6

Qualitative research: its nature and approaches

> *Qualitative research helps the marketer to understand the richness, depth and complexity of consumers.*

Objectives

After reading this chapter, you should be able to:

1 explain the difference between qualitative and quantitative research in terms of the objectives, sampling, data collection and analysis, and outcomes;

2 describe why qualitative research is used in marketing research;

3 understand the basic philosophical stances that underpin qualitative research;

4 understand the nature and application of ethnographic approaches;

5 understand how qualitative researchers develop theory through a grounded theory approach;

6 explain the potential of action research to qualitative marketing researchers;

7 discuss the considerations involved in collecting and analysing qualitative data collected from international markets;

8 understand the ethical issues involved in collecting and analysing qualitative data.

STAGE 1
Problem definition

STAGE 2
Research approach developed

STAGE 3
Research design developed

STAGE 4
Fieldwork or data collection

STAGE 5
Data preparation and analysis

STAGE 6
Report preparation and presentation

Overview

Qualitative research forms a major role in supporting marketing decision making, primarily as an exploratory design but also as a descriptive design. Researchers may undertake qualitative research to help define a research problem, to support quantitative, descriptive or causal research designs or as a design in its own right. Qualitative research is often used to generate hypotheses and identify variables that should be included in quantitative approaches. It may be used after or in conjunction with quantitative approaches where illumination of statistical findings is needed. In some cases qualitative research designs are adopted in isolation, after secondary data sources have been thoroughly evaluated or even in an iterative process with secondary data sources.

In this chapter, we discuss the differences between qualitative and quantitative research and the role of each in marketing research. We present reasons for adopting a qualitative approach to marketing research (Stage 2 of the marketing research process). These reasons are developed by examining the basic philosophical stances that underpin qualitative research. The concept of ethnographic techniques is presented, with illustrations of how such techniques support marketing decision-makers. The concept of grounded theory is presented, illustrating its roots, the steps involved and the dilemmas for researchers in attempting to be objective and sensitive to the expressions of participants. Action research is an approach to conducting research that has been adopted in a wide variety of social and management research settings. Action research is developing in marketing research and offers great potential for consumers, decision-makers and researchers alike. The roots of action research are presented, together with the iterative stages involved and the concept of action research teams. The considerations involved in conducting qualitative research when researching international markets are discussed, especially in contrasting approaches between the USA and Europe. Several ethical issues that arise in qualitative research are identified.

Before the chapter moves on to the substantive issues, one key point to note in the application of qualitative research is the name applied to the individuals who take part in interviews and observations. Note the emphasis in the following example.

Example **'Research is War'[1]**

Dutch agency MARE is calling for respondents to be promoted to the status of participants in research. The method that it has been developing puts the respondent in the position of participant rather than a passive reactive pawn in research. We take two participants, show them an image or commercial, and then invite one participant to ask the other what he or she just saw. This results in a conversation that is not directed by researchers, which is an important aspect. Our intervention is mostly focused on finding a good match between two participants who can communicate with one another. The method reveals how a consumer absorbs information and reports about it to fellow consumers, and it shows the client which elements of a commercial message work and which elements do not. Clients were reluctant to use this approach when it was first used in 1995. MARE senses there is a market for it now, so with an amount of refining, adjusting and testing, it ran from September 2005. A multinational in the Netherlands which has young marketers will apply it in research among young consumers.

This example illustrates the creative thinking necessary to get the most from qualitative research and the respect that should be given to individuals who may be asked to engage in a process that sometimes goes way beyond simple questioning. Embracing this attitude, the term 'participant' rather than 'respondent' or 'informant' is used throughout Chapters 6 to 9, i.e. the core qualitative research chapters of the text.

We now move on to the nature of qualitative research with three examples. Given the nature of its products and competitive environment, the first example illustrates why L'Oréal feels that qualitative research is of importance to it. The second example illustrates how Philips uses qualitative techniques to support its trend forecasting and product design. Note in this example the use of an analytical framework to help researchers and decision-makers gain insight from the data they collect. In the third example, Sports Marketing Surveys uses qualitative brainstorming techniques and focus groups as part of a research design to support the development of rugby league. These examples illustrate the rich insights into the underlying behaviour of consumers that can be obtained by using qualitative techniques.

Example

A research commitment more than skin deep[2]

L'Oréal is the largest supplier of toiletries and cosmetics in the world. The group tucks under its umbrella some of the best known brands and companies in the beauty business: cosmetics houses Lancôme, Vichy and Helena Rubenstein, and fragrance houses Guy Laroche, Cacharel and Ralph Lauren. Given the French penchant for qualitative research, and given the nature of the cosmetics industry, Anne Murray, Head of Research, was asked which type of research she favoured.

We're not particularly pro-quantitative or qualitative. Nevertheless, I do think qualitative in our area is very important. There are many sensitive issues to cover – environmental concerns, animal testing, intimate personal products. And increasingly, we have given to us very technical propositions from the labs, and what is a technical breakthrough to a man in a white coat is not necessarily so to a consumer. So the research department has to be that interface between the technical side and the consumer.

Example

Trend forecasting at Philips[3]

Marco Bevolo is in the future business. At Philips Design, the design department of the electronics multinational, he is responsible for identifying short-term trends in popular culture and aesthetics design. Marco believes his job has a lot in common with marketing research. Trend forecasting at Philips is carried out through a model developed by Marco and his team called CultureScan. The theoretical background of their approach comes from the Birmingham school of popular culture analysis as well as from the kind of cultural analysis performed by scholars who study phenomena such as 'punks' in Western cities as if they were a tribe in New Guinea. Rather than hinting at tangible design solutions – colour, 'touch and feel' or shape – of TVs, MP3 players or other specific products, CultureScan is supposed to provide an insight into the broader, longer term undercurrents in popular culture and aesthetics design all over the world. These broad trends are then customised by Philips decision teams. CultureScan uses both an internal and external network of experts to collect information on a wide variety of trends. These insights are then filtered by objective tools in order to validate the outcomes and make them actionable. The predictive horizon of CultureScan is 18 to 36 months with the trends refined every two or three years.
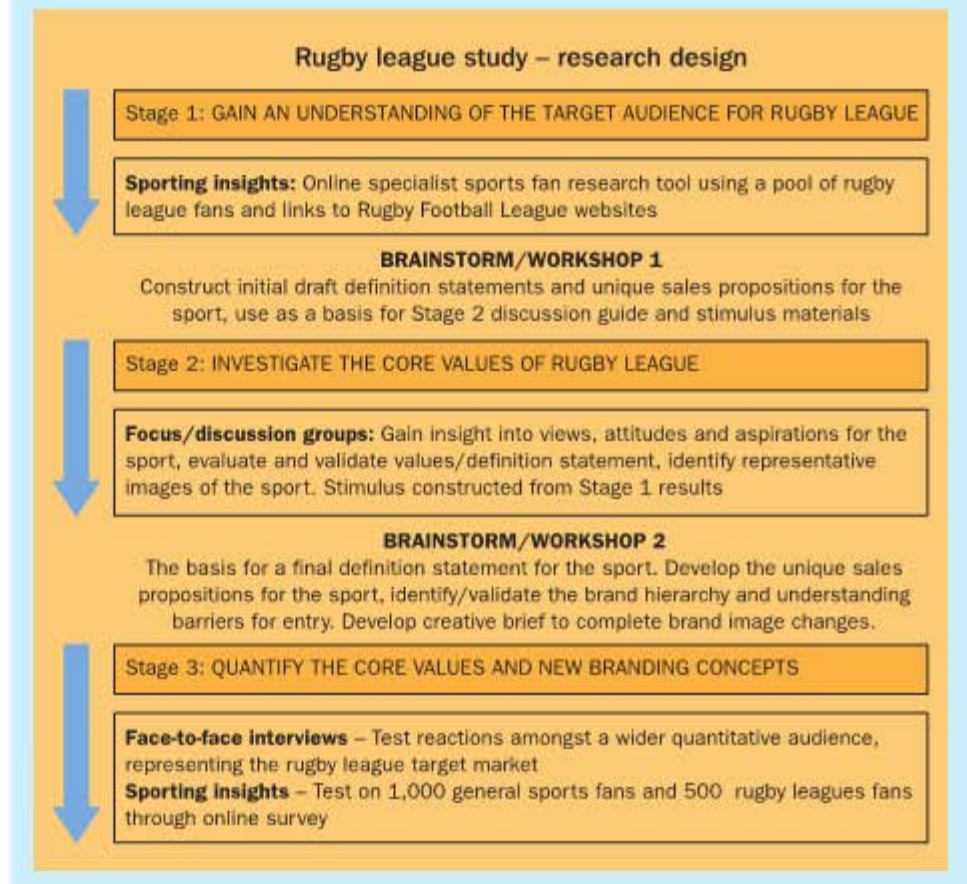
Focus on Sports Marketing Surveys

Rugby league study

Sports Marketing Surveys was commissioned by the Rugby Football League (the governing body of rugby league in the UK) to:

- gain an understanding of the target audience for rugby league;
- investigate the core values of rugby league;
- verify the core values and quantify the new branding concepts.

The figure below sets out the research design adopted for the project, setting out the research objectives, the qualitative and quantitative techniques used, and how each stage feeds the development of subsequent stages.

Rugby league study – research design

Stage 1: GAIN AN UNDERSTANDING OF THE TARGET AUDIENCE FOR RUGBY LEAGUE

Sporting insights: Online specialist sports fan research tool using a pool of rugby league fans and links to Rugby Football League websites

BRAINSTORM/WORKSHOP 1
Construct initial draft definition statements and unique sales propositions for the sport, use as a basis for Stage 2 discussion guide and stimulus materials

Stage 2: INVESTIGATE THE CORE VALUES OF RUGBY LEAGUE

Focus/discussion groups: Gain insight into views, attitudes and aspirations for the sport, evaluate and validate values/definition statement, identify representative images of the sport. Stimulus constructed from Stage 1 results

BRAINSTORM/WORKSHOP 2
The basis for a final definition statement for the sport. Develop the unique sales propositions for the sport, identify/validate the brand hierarchy and understanding barriers for entry. Develop creative brief to complete brand image changes.

Stage 3: QUANTIFY THE CORE VALUES AND NEW BRANDING CONCEPTS

Face-to-face interviews – Test reactions amongst a wider quantitative audience, representing the rugby league target market
Sporting insights – Test on 1,000 general sports fans and 500 rugby leagues fans through online survey

In qualitative research, research agencies and companies are continually looking to find better ways to understand consumers' thought processes and motivations. This has led to a wealth of research approaches, including techniques borrowed from anthropology, ethnography, sociology and psychology. For example, Intel has a specialist team of researchers, including ethnographers, anthropologists and psychologists, whose principal form of research is in the home. 'People don't tell you things because they don't think you'll be interested. By going into their homes you can see where and how they use their computers,' says Wendy March, Intel's interaction designer of Intel Architecture.[4]

Primary data: qualitative versus quantitative research

As explained in Chapter 4, primary data are originated by the researcher for the specific purpose of addressing the problem at hand. Primary data may be qualitative or quantitative in nature, as shown in Figure 6.1.

Dogmatic positions are often taken in favour of either **qualitative research** or **quantitative research** by marketing researchers and decision-makers alike. The positions are founded upon which approach is perceived to give the most accurate understanding of consumers. The extreme stances on this issue mirror each other. Many quantitative researchers are apt to dismiss qualitative studies completely as giving no valid findings – indeed as being little better than journalistic accounts. They assert that qualitative researchers ignore representative sampling, with their findings based on a single case or only a few cases. Equally adamant are some qualitative researchers who firmly reject statistical and other quantitative methods as yielding shallow or completely misleading information. They believe that to understand cultural values and consumer behaviour requires interviewing or intensive field observation. Qualitative techniques they see as being the only methods of data collection sensitive enough to capture the nuances of consumer attitudes, motives and behaviour.[5]

There are great differences between the quantitative and qualitative approaches to studying and understanding consumers. The arguments between qualitative and quantitative marketing researchers about their relative strengths and weaknesses are of real practical value. The nature of marketing decision making encompasses a vast array of problems and types of decision-maker. This means that seeking a singular and uniform approach to supporting decision-makers by focusing on one approach is futile. Defending qualitative approaches for a particular marketing research problem through the positive benefits it bestows and explaining the negative alternatives of a quantitative approach is healthy – and vice versa. Business and marketing decision-makers use both approaches and will continue to need both.[6]

The distinction between qualitative and quantitative research can be in the context of research designs as discussed in Chapter 3. There is a close parallel in the distinctions between 'exploratory and conclusive research' and 'qualitative and quantitative research'. There is a parallel, but the terms are not identical. There are circumstances where qualitative research can be used to present detailed descriptions that cannot be measured in a quantifiable manner: for example, in describing characteristics and styles of music that may be used in an advertising campaign or in describing the interplay of how families go through the process of choosing, planning and buying a holiday.

Conversely, there may be circumstances where quantitative measurements are used conclusively to answer specific hypotheses or research questions using descriptive or experimental techniques. Beyond answering specific hypotheses or research questions, there may
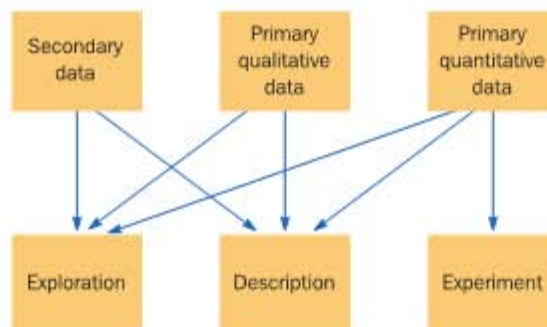
Figure 6.1
A classification of
marketing research
data

be sufficient data to allow data mining or an exploration of relationships between individual measurements to take place. The concept of data mining illustrated in Chapter 5 allows decision-makers to be supported through exploratory quantitative research.

The nature of qualitative research

Qualitative research encompasses a variety of methods that can be applied in a flexible manner, to enable participants to reflect upon and express their views or to observe their behaviour. It seeks to encapsulate the behaviour, experiences and feelings of participants in their own terms and context; for example, when conducting research on children, an informality and child-friendly atmosphere is vital, considering features such as the decoration of the room with appropriately themed posters.[7]

Qualitative research is based on at least two intellectual traditions.[8] The first and perhaps most important is the set of ideas and associated methods from the broad area of depth psychology.[9] This movement was concerned with the less conscious aspects of the human psyche. It led to a development of methods to gain access to individuals' subconscious and/or unconscious levels. So, while individuals may present a superficial explanation of events to themselves or to others, these methods sought to dig deeper and penetrate the superficial.

The second tradition is the set of ideas and associated methods from sociology, social psychology and social anthropology, and the disciplines of ethnography, linguistics and semiology. The emphases here are upon holistic understanding of the world-view of people. The researcher is expected to 'enter' the hearts and minds of those they are researching, to develop an empathy with their experiences and feelings.

Both traditions have a concern with developing means of communication between the researcher and those being researched. There can be much interaction between the two broad traditions, which in pragmatic terms allows a wide and rich array of techniques and interpretations of collected data.

Qualitative research is a significant contributor to the marketing research industry, accounting for substantial expenditure (around 16% of all spending on marketing research methods),[10] and is growing. In commercial terms, it is a billion-euro-plus global industry. However, it is not just a matter of business value. Qualitative thinking has had a profound effect upon marketing and the marketing research industry as a whole.

Rationale for using qualitative research

It is not always possible, or desirable, to use structured quantitative techniques to obtain information from participants or to observe them. Thus, there are several reasons to use qualitative techniques. These reasons, either individually or in any combination, explain why certain marketing researchers adopt a particular approach (Stage 2 of the marketing research process) to how they conduct research, analyse data and interpret their findings.

1 *Preferences and/or experience of the researcher.* Some researchers are more oriented and temperamentally suited to do this type of work. Just as some researchers enjoy the challenge of using statistical techniques, there are researchers who enjoy the challenges of qualitative techniques and the interpretation of diverse types of data. Such researchers have been trained in particular disciplines (e.g. anthropology) and philosophies (e.g. hermeneutics) that traditionally make use of qualitative research designs and techniques.

2 *Preferences and/or experience of the research user.* Some decision-makers are more oriented to receiving support in a qualitative manner. This orientation could come from their training but it could also be due to the type of marketing decisions they have to

take. Decision-makers working in a creative environment of advertising copy or the development of brand 'personalities', for example, may have a greater preference for data that will feed such 'artistic' decisions. In the following example, consider how decision-makers would get to understand and represent the language used by teenagers. Consider also the implications for a brand if marketers do not fully understand the language and values of their target markets.

Example	First get the language right, then tell them a story[11]

Teenagers immediately recognise a communication in their language and are very quick to judge whether advertisers have got it right. They see ads and like them, reject them, ignore them or, in many cases, discuss them. Teenagers are so fluent in 'marketing speak' because marketing and advertising are perceived by them to be the kind of work which can be creative, interesting and acceptable. They discuss with one another the advertising which they perceive to be targeting them.

Pelgram Walters International conducted a study called Global Village. The main contention of the study was that teenagers around the world have a common language, which speaks to them in the filmed advertising medium. Part of the study consisted of focus group discussions of 12–18 year olds. Pepsi's Next Generation advertisement was criticised by more media-literate teenage markets (the UK, Germany and the USA) for stereotyping teens and misunderstanding who they are. The ad was a montage of very hip skateboarding teens, male teens wearing make-up, perhaps implying that Pepsi is for the next generation which looks thus. The main complaint was 'we don't look like that', the teens saying that they were not all the same as one another. By aligning the brand image with these extreme images, the commercial was less appealing to mainstream teen consumers.

3 *Sensitive information.* Participants may be unwilling to answer or to give truthful answers to certain questions that invade their privacy, embarrass them, or have a negative impact on their ego or status. Questions that relate to sanitary products and contraception are examples of personally sensitive issues. In industrial marketing research, questions that relate to corporate performance and plans are examples of commercially sensitive issues. Techniques that build up an amount of rapport and trust, that allow gentle probing in a manner that suits individual participants, can help researchers get close to participants, and may allow sensitive data to be elicited.

4 *Subconscious feelings.* Participants may be unable to provide accurate answers to questions that tap their subconscious. The values, emotional drives and motivations residing at the subconscious level are disguised from the outer world by rationalisation and other ego defences. For example, a person may have purchased an expensive sports car to overcome feelings of inferiority. But if asked 'Why did you purchase this sports car?' that person may say 'I got a great deal', 'My old car was falling apart', or 'I need to impress my customers and clients.' The participants do not have to put words to their deeper emotional drives until researchers approach them! In tapping into those deeper emotional drives, qualitative research can take a path that evolves and is right for the participant.

5 *Complex phenomena.* The nature of what participants are expected to describe may be difficult to capture with structured questions. For example, participants may know what brands of wine they enjoy, what types of music they prefer or what images they regard as being prestigious. They may not be able to clearly explain why they have these feelings or where these feelings are coming from.

6 *The holistic dimension.* The object of taking a holistic outlook in qualitative research is to gain a comprehensive and complete picture of the whole context in which the phenomena of interest occur. It is an attempt to describe and understand as much as possible

about the whole situation of interest. Each scene exists within a multi-layered and inter-related context and it may require multiple methods to ensure the researcher covers all angles. This orientation helps the researcher discover the interrelationships among the various components of the phenomenon under study. In evaluating different forms of consumer behaviour, the researcher seeks to understand the relationship of different contextual environments upon that behaviour. Setting behaviour into context involves placing observations, experiences and interpretations into a larger perspective.[12] An example of this may be of measuring satisfaction with a meal in a restaurant. A questionnaire can break down components of the experience in the restaurant and quantify the extent of satisfaction with these. But what effect did the 'atmosphere' have upon the experience? What role did the type of music, the colour and style of furniture, aromas coming from the kitchen, other people in the restaurant, the mood when entering the restaurant, feelings of relaxation or tension as the meal went on, contribute to the feeling of atmosphere? Building up an understanding of the interrelationship of the context of consumption allows the qualitative researcher to build up this holistic view. This can be done through qualitative observation and interviewing.

7 *Developing new theory.* This is perhaps the most contentious reason for conducting qualitative research. Chapter 11 details how causal research design through experiments helps to generate theory. Qualitative researchers may argue that there are severe limitations in conducting experiments upon consumers and that quantitative approaches are limited to elaborating or extending existing theory. The development of 'new' theory through a qualitative approach is called 'grounded theory', which will be addressed later.

8 *Interpretation.*[13] Qualitative techniques often constitute an important final step in research designs. Large-scale surveys and audits often fail to clarify the underlying reasons for a set of findings. Using qualitative techniques can help to elaborate and explain underlying reasons in quantitative findings.

Philosophy[14] and qualitative research

Positivist perspectives

Theory
A conceptual scheme based on foundational statements, or axioms, that are assumed to be true.

Operationalised
The derivation of measurable characteristics to encapsulate marketing phenomena, e.g. the concept of 'customer loyalty' can be operationalised through measurements such as the frequency of repeat purchases or the number of years that a business relationship has existed.

Empiricism
A theory of knowledge. A broad category of the philosophy of science that locates the source of all knowledge in experience.

Positivism
A philosophy of language and logic consistent with an empiricist philosophy of science.

In Chapter 2 we discussed the vital role that **theory** plays in marketing research. Researchers rely on theory to determine which variables should be investigated, how variables should be **operationalised** and measured, and how the research design and sample should be selected. Theory also serves as a foundation on which the researcher can organise and interpret findings. Good marketing research is founded upon theory and contributes to the development of theory to improve the powers of explanation, prediction and understanding in marketing decision-makers.[15]

The dominant perspective of developing new theory in marketing research has been one of **empiricism** and more specifically **positivism**. The central belief of a positivist position is a view that the study of consumers and marketing phenomena should be 'scientific' in the manner of the natural sciences. Marketing researchers of this persuasion adopt a framework for investigation akin to the natural scientist. For many, this is considered to be both desirable and possible. A fundamental belief shared by positivists is the view that the social and natural worlds 'conform to certain fixed and unalterable laws in an endless chain of causation'.[16] The main purpose of a scientific approach to marketing research is to establish causal laws that enable the prediction and explanation of marketing phenomena. To establish these laws, a scientific approach must have, as a minimum, reliable information or 'facts'. The emphasis on facts leads to a focus upon objectivity, rigour and measurement.

Paradigm
A set of assumptions consisting of agreed-upon knowledge, criteria of judgement, problem fields, and ways to consider them.

As an overall research approach (using the description of a **paradigm** or research approach as developed in Chapter 2) qualitative research does not rely upon measurement or the establishment of 'facts' and so does not fit with a positivist perspective. However, if qualitative research is just seen as a series of techniques, they can be used to develop an understanding of the nature of a research problem, and to develop and pilot question-naires. In other words, the positivist perspective of qualitative research is to see it as a set of techniques, applied as preliminary stages to more rigorous techniques that measure, i.e. surveys and questionnaires. This use of qualitative techniques is fine but may be limiting. To conduct in-depth interviews, focus groups or projective techniques, to understand the language and logic of target questionnaire participants makes good sense. However, using qualitative techniques just to develop quantitative techniques can affect how those tech-niques are used. As an illustration, we will examine how focus groups may be conducted.

The term 'focus group discussion' is commonly used across all continents, yet it sub-sumes different ways of applying the technique. There are two main schools of thought, which may be termed 'cognitive' and 'conative'.

1 *Cognitive.* American researchers generally follow this tradition, which largely follows a format and interviewing style as used in quantitative studies. 'American-style groups' is shorthand in Europe for large groups (10 participants on average), a structured proce-dure and a strong element of external validation. Within the cognitive approach, the analysis or articulation has been worked on before, and so the interviews are largely meant to confirm or expand on known issues.
2 *Conative.* European researchers generally follow this tradition. This style assumes a dif-ferent starting point, one that emphasises exploration, with analysis taking place during and after the group. There is less structure to the questions, with group members being encouraged to take their own paths of discussion, make their own connections and let the whole process evolve.

Table 6.1 summarises the differences between the American (cognitive) and European (conative) approaches to conducting focus groups. Note the longer duration of the European approach to allow the exploration to develop. To maintain the interest and motivation of participants for this time period, the interview experience must be stimu-lating and enjoyable.

International marketers have always been aware that qualitative research as it developed in the USA and Europe involves quite different practices, stemming from different prem-ises and yielding different results. American-style qualitative research started from the same evaluative premise as quantitative research but on a smaller scale. This made it cheaper, quicker and useful for checking out the less critical decisions. European-style qualitative research started from the opposite premise to quantitative research: it was developmental, exploratory and creative rather than evaluative. It was used as a tool of understanding, to get underneath consumer motivation.[17]

The American style uses a detailed discussion guide which follows a logical sequence and is usually strictly adhered to. The interviewing technique involves closed questions and straight answers. This type of research is used primarily to inform about behaviour and to confirm hypotheses already derived from other sources. For this reason, clients who have attended groups often feel they do not need any further analysis; the group interaction supplies the answers. Transcripts are rarely necessary and reports are often summarised or even done away with altogether.

The European style is used primarily to gain new insight; it also works from a discus-sion guide, but in a less structured way. The interviewing technique is opportunistic and probing. Projective techniques are introduced to help researchers understand underlying motivations and attitudes. Because the purpose is 'understanding', which requires a cre-ative synthesis of (sometimes unconscious) consumer needs and brand benefits, analysis is time consuming and usually involves full transcripts.

Table 6.1 The two schools of thought about 'focus group discussions'[18]

Characteristics	Cognitive	Conative
Purpose	Demonstration	Exploration
Sample size	10–12	6–8
Duration	1.5 hours	1.5 to 6 hours
Interviewing	Logical sequence	Opportunistic
Questions	Closed	Open
Techniques	Straight question, questionnaires, hand shows, counting	Probing, facilitation, projectives, describing
Response required	Give answers	Debate issues
Interviewer	Moderator	Researcher
Observer's role	To get proof	To understand
Transcripts	Rarely necessary	Usually full
Analysis	On the spot	Time-consuming
Focus of time	Preplanning	Post-fieldwork
Accusations against other style	'Formless'	'Over-controlling'
Suited for	Testing or proving ideas	Meaning or understanding
Output	To be confirmed in quantitative studies	Can be used in its own right to support decision-makers

In the above descriptions of American and European traditions of applying qualitative techniques, it is clear to see that the American perspective is positivist, i.e. aims to deliver a 'factual' impression of consumers. The facts may be established, but they may not be enough – they may not provide the richness or depth of understanding that certain marketing decision-makers demand. So, although a positivist perspective has a role to play in developing explanations, predictions and understanding of consumers and marketing phenomena, it has its limitations and critics. The following quote from the eminent qualitative practitioner Peter Cooper cautions us of what we really mean by the term 'qualitative':

> *There is much qualitative research that still hangs on the positivist model or is little more than investigative journalism. Competition also comes from the media with increasing phone-ins and debates described as 'research'. We need to be careful about the abuse of what goes under the title 'qualitative'.*[19]

The dominance of positivist philosophy in marketing research has been and is being challenged by other philosophical perspectives, taken and adapted from disciplines such as anthropology and sociology. These perspectives have helped marketing researchers to develop richer explanations and predictions and especially an understanding and a meaning as seen through the eyes of consumers.

Interpretivist perspectives

In general there are considered to be two main research paradigms that are used by marketing researchers.[20] These are the positivist paradigm and the interpretivist paradigm (though these are by no means the only research paradigms that may be adopted by marketing researchers).[21] Table 6.2 presents alternative names that may be used to describe these paradigms.

Table 6.2 Alternative paradigm names[22]

Positivist	Interpretivist
Quantitative	Qualitative
Objectivist	Subjectivist
Scientific	Humanistic
Experimentalist	Phenomenological
Traditionalist	Revolutionist

Whilst it may be easier to think of these as quite clear, distinct and mutually exclusive perspectives of developing valid and useful marketing knowledge, the reality is somewhat different. There is a huge array of versions of these paradigms, presented by philosophers, researchers and users of research findings. These versions change depending upon the assumptions of researchers and the context and subjects of their study, i.e. the ultimate nature of the research problem. It has long been argued[23] that both positivist and interpretivist paradigms are valid in conducting marketing research and help to shape the nature of techniques that researchers apply.

In order to develop an understanding of what an interpretivist paradigm means, Table 6.3 presents characteristic features of the two paradigms.

Table 6.3 Paradigm features[24]

Issue	Positivist	Interpretivist
Reality	Objective and singular	Subjective and multiple
Researcher–participant	Independent of each other	Interacting with each other
Values	Value free = unbiased	Value laden = biased
Researcher language	Formal and impersonal	Informal and personal
Theory and research design	Simple determinist Cause and effect Static research design Context free Laboratory Prediction and control Reliability and validity Representative surveys Experimental design Deductive	Freedom of will Multiple influences Evolving design Context bound Field/ethnography Understanding and insight Perceptive decision making Theoretical sampling Case studies Inductive

Comparison of positivist and interpretivist perspectives

The paradigms can be compared through a series of issues. The descriptions of these issues do not imply that any particular paradigm is stronger than the other. In each issue there are relative advantages and disadvantages specific to any research question under investigation. The issues are dealt with in the following subsections.

Reality. The positivist supposes that reality is 'out there' to be captured. It thus becomes a matter of finding the most effective and objective means possible to draw together infor-

mation about this reality. The interpretivist stresses the dynamic, participant-constructed and evolving nature of reality, recognising that there may be a wide array of interpretations of realities or social acts.

Researcher–participant. The positivist sees the participant as an 'object' to be measured in a consistent manner. The interpretivist may see participants as 'peers' or even 'companions', seeking the right context and means of observing and questioning to suit individual participants. Such a view of participants requires the development of rapport, an amount of interaction and evolution of method as the researcher learns of the best means to elicit information.

Values. The positivist seeks to set aside his or her own personal values. The positivist's measurements of participants are being guided by established theoretical propositions. The task for the positivist is to remove any potential bias. The interpretivist recognises that his or her own values affect how he or she questions, probes and interprets. The task for interpretivists is to realise the nature of their values and how these affect how they question and interpret.

Researcher language. In seeking a consistent and unbiased means to measure, the positivist uses a language in questioning that is uniformly recognised. This uniformity may emerge from existing theory (to allow comparability of findings) or from the positivist's vision of what may be relevant to the target group of participants. Ultimately, the positivist imposes a language and logic upon target participants in a consistent manner. The interpretivist seeks to draw out the language and logic of target participants. The language used may differ between participants and develop in different ways as the interpretivist learns more about a topic and the nature of participants.

Causality
Causality applies when the occurrence of X increases the probability of the occurrence of Y.

Extraneous variables
Variables other than dependent and independent variables which may influence the results of an experiment.

Determinism
A doctrine espousing that everything that happens is determined by a necessary chain of causation.

Target population
The collection of elements or objects that possess the information sought by the researcher and about which inferences are made.

Reliability
The extent to which a measurement reproduces consistent results if the process of measurement were to be repeated.

Validity
The extent to which a measurement represents characteristics that exist in the phenomenon under investigation.

Case study
A detailed study based upon the observation of the intrinsic details of individuals, groups of individuals and organisations.

Theory and research design. In the development of theory, the positivist seeks to establish **causality** (discussed in detail in Chapter 11) through experimental methods. Seeking causality helps the positivist to explain phenomena and hopefully predict the recurrence of what has been observed in other contexts. There are many **extraneous variables** that may confound the outcome of experiments, hence the positivist will seek to control these variables and the environment in which an experiment takes place. The ultimate control in an experiment takes place in a laboratory situation. In establishing causality through experiments, questions of causality usually go hand in hand with questions of **determinism**, i.e. if everything that happens has a cause, then we live in a determinist universe.

The positivist will go to great pains to diagnose the nature of a research problem and establish an explicit and set research design to investigate the problem. A fundamental element of the positivist's research design is the desire to generalise findings to a **target population**. Most targeted populations are so large that measurements of them can only be managed through representative sample surveys. The positivists use theory to develop the consistent and unbiased measurements they seek. They have established rules and tests of the **reliability** and **validity** of their measurements and continually seek to develop more reliable and valid measurements.

In the development of theory, the interpretivist seeks to understand the nature of multiple influences of marketing phenomena through **case studies**. The search for multiple influences means focusing upon the intrinsic details of individual cases and the differences between different classes of case. This helps the interpretivist to describe phenomena and hopefully gain new and creative insights to understand ultimately the nature of consumer behaviour in its fullest sense. The consumers that interpretivists focus

upon, live, consume and relate to products and services in a huge array of contexts, hence the interpretivist will seek to understand the nature and effect of these contexts on the chosen cases. The contexts in which consumers live and consume constitute the field in which interpretivists immerse themselves to conduct their investigations. In understanding the nature and effect of context upon consumers, the interpretivist does not consider that *everything* that happens has a cause and that we live in a determinist universe. There is a recognition and respect for the notion of free will.

The interpretivist will go to great pains to learn from each step of the research process and adapt the research design as his or her learning develops. The interpretivist seeks to diagnose the nature of a research problem but recognises that a set research design may be restrictive and so usually adopts an **evolving research design**. A fundamental element of the interpretivist's research design is the desire to generalise findings to different contexts, such as other types of consumer. However, rather than seeking to study large samples to generalise to target populations, the interpretivist uses **theoretical sampling**. This means that the data gathering process for interpretivists is driven by concepts derived from evolving theory, based on the notion of seeking out different situations and learning from the comparisons that can be made. The purpose is to go to places, people or events that will maximise opportunities to discover variations among concepts. Interpretivists use theory initially to help guide which cases they should focus upon, the issues they should observe and the context of their investigation. As their research design evolves they seek to develop new theory and do not wish to be 'blinkered' or too focused on existing ideas. They seek multiple explanations of the phenomena they observe and create what they see as the most valid relationship of concepts and, ultimately, theory. Interpretivists seek to evaluate the strength of the theory they develop. The strongest means of evaluating the strength of interpretivist theory lies in the results of decision making that is based on the theory. Interpretivists continually seek to evaluate the worth of the theories they develop. A principal output of research generated by an interpretivist perspective should therefore be findings that are accessible and intended for use. If they are found to be meaningful by decision-makers and employed successfully by them, this may constitute further evidence of the theory's validity. If employed and found lacking, questions will have to be asked of the theory, about its comprehensibility and comprehensiveness and about its interpretation. If it is not used, the theory may be loaded with validity but have little value.

Evolving research design
A research design where particular research techniques are chosen as the researcher develops an understanding of the issues and participants.

Theoretical sampling
Data gathering driven by concepts derived from evolving theory and based on the concept of 'making comparisons'.

Summarising the broad perspectives of positivism and interpretivism

The positivist seeks to establish the legitimacy of his or her approach through **deduction**. In a deductive approach, the following process unfolds:

Deduction
A form of reasoning in which a conclusion is validly inferred from some premises, and must be true if those premises are true.

- An area of enquiry is identified, set in the context of well-developed theory, which is seen as vital to guide researchers, ensuring that they are not naive in their approach and do not 'reinvent the wheel'.
- The issues to focus an enquiry upon emerge from the established theoretical framework.
- Specific variables are identified that the researchers deem should be measured, i.e. hypotheses are set.
- An 'instrument' to measure specific variables is developed.
- Participants give answers to set and specific questions with a consistent language and logic.
- The responses to the set questions are analysed in terms of a prior established theoretical framework.
- The researchers test theory according to whether their hypotheses are accepted or rejected. From testing theory in a new context, they seek to develop existing theory incrementally.

Such a process means that positivists reach conclusions based upon agreed and measurable 'facts'. The building and establishment of 'facts' forms the premises of deductive arguments. Deductive reasoning starts from general principles from which the deduction is to be made, and proceeds to a conclusion by way of some statement linking the particular case in question.

A deductive approach has a well-established role for existing theory: it informs the development of hypotheses, the choice of variables and the resultant measures.[25] Whereas the deductive approach starts with theory expressed in the form of hypotheses, which are then tested, an inductive approach avoids this, arguing that it may prematurely close off possible areas of enquiry.[26]

The interpretivist seeks to establish the legitimacy of his or her approach through **induction**. In an inductive approach, the following process unfolds:

Induction
A form of reasoning that usually involves the inference that an instance or repeated combination of events may be universally generalised.

- An area of enquiry is identified, but with little or no theoretical framework. Theoretical frameworks are seen as restrictive, narrowing the researcher's perspective, and an inhibitor to creativity.
- The issues to focus an enquiry upon are either observed or elicited from participants in particular contexts.
- Participants are aided to explain the nature of issues in a particular context.
- Broad themes are identified for discussion, with observation, probing and in-depth questioning to elaborate the nature of these themes.
- The researchers develop their theory by searching for the occurrence and interconnection of phenomena. They seek to develop a model based upon their observed combination of events. Such a process means that interpretivists reach conclusions without 'complete evidence'.

With the intense scrutiny of individuals in specific contexts that typify an interpretivist approach, tackling large 'representative' samples is generally impossible. Thus, the validity of the interpretivist approach is based upon 'fair samples'. Interpretivists should not seek only to reinforce their own prejudice or bias, seizing upon issues that are agreeable to them and ignoring those that are inconvenient. If they are to argue reasonably they should counteract this tendency by searching for conflicting evidence.[27] Their resultant theory should be subject to constant review and revision.

Ethnographic research

It is clear that an interpretive approach does not set out to test hypotheses but to explore the nature and interrelationships of marketing phenomena. The focus of investigation is a detailed examination of a small number of cases rather than a large sample. The data collected are analysed through an explicit interpretation of the meanings and functions of consumer actions. The product of these analyses takes the form of verbal descriptions and explanations, with quantification and statistical analysis playing a subordinate role. These characteristics are the hallmark of a research approach that has developed and been applied to marketing problems over many years in European marketing research. This research approach is one of ethnographic research.

Ethnography
A research approach based upon the observation of the customs, habits and differences between people in everyday situations.

Ethnography as a general term includes observation and interviewing and is sometimes referred to as participant observation. It is, however, used in the more specific case of a method which requires a researcher to spend a large amount of time observing a particular group of people, by sharing their way of life.[28] Ethnography is the art and science of describing a group or culture. The description may be of a small tribal group in an exotic land or a classroom in middle-class suburbia. The task is much like the one taken on by the investigative reporter, who interviews relevant people, reviews records, weighs

the credibility of one person's opinions against another's, looks for ties to special interests and organisations and writes the story for a concerned public and for professional colleagues. A key difference between the investigative reporter and the ethnographer, however, is that whereas the journalist seeks out the unusual, the murder, the plane crash, or the bank robbery, the ethnographer writes about the routine daily lives of people. The more predictable patterns of human thought and behaviour are the focus of enquiry.[29]

The origins of ethnography are in the work of nineteenth-century anthropologists who travelled to observe different pre-industrial cultures. An example in a more contemporary context could be the study of death rituals in Borneo, conducted over two years by the anthropologist Peter Metcalf.[30] Today, 'ethnography' encompasses a much broader range of work, from studies of groups in one's own culture, through experimental writing, to political interventions. Moreover, ethnographers today do not always 'observe', at least not directly. They may work with cultural artefacts such as written texts, or study recordings of interactions they did not observe at first hand,[31] or even, as in the following example, the observations of a refrigerator.

Example   ### The Electrolux 'screen fridge'

Electrolux and Ericsson joined forces to test new products using ethnographic methods. They provided a group of Swedish consumers with 'screen fridges' which download recipes from the Internet, store shopping lists and have a built-in video camera to record messages. By putting the fridges in people's homes Electrolux could see how the technology was actually used and find out whether participants would be prepared to pay for it. This type of research is relatively expensive, but it gives in-depth information that could not be generated from a focus group or one-to-one interview.

Before developing an understanding of the ethnography in marketing research, it is worth summarising the aims of ethnographic research:

- *Seeing through the eyes of others.* Viewing events, actions, norms and values from the perspective of the people being studied.
- *Description.* Attending to mundane detail to help understand what is going on in a particular context and to provide clues and pointers to other layers of reality.

Source: © Alamy

- *Contextualism.* The basic message that ethnographers convey is that whatever the sphere in which the data are being collected, we can understand events only when they are situated in the wider social and historical context.
- *Process.* Viewing social life as involving an interlocking series of events.
- *Avoiding early use of theories and concepts.* Rejecting premature attempts to impose theories and concepts which may exhibit a poor fit with participants' perspectives.[32] This will be developed further in this chapter when we examine grounded theory.
- *Flexible research designs.* Ethnographers' adherence to viewing social phenom-

ena through the eyes of their subjects has led to a wariness regarding the imposition of prior and possibly inappropriate frames of reference on the people they study. This leads to a preference for an open and unstructured research design which increases the possibility of coming across unexpected issues.

This final point is illustrated in the following example. This example can be explored in more depth by actually viewing the reviewed film.

Example

Kitchen Stories[33]

Kitchen Stories was an unlikely contender for one of the best movies of 2004. Kitchen Stories (Salmer Fra Kjokkenet), a Norwegian/Swedish co-production, is about an ethnographic study of the 1950s into the kitchen routines of single Norwegian men. Beneath the light humour, the film seeks to make a more serious point about whether the rules governing research stand in the way of reaching a true understanding of people. The film is based upon the real-life story of a team of Swedish researchers who set out to design the perfect kitchen. The researcher, Folke, finds himself partnered with the participant from hell: the doddering, grumpy recluse, Isak. Assuming his position on a shaky high chair stuck in the corner of the kitchen, it quickly dawns on Folke that Isak is determined to make his stay as difficult as possible. Both men are under strict instructions not to communicate and in these circumstances, much humour is wrought from Isak's petty behaviour such as leaving a tap dripping in an attempt to infuriate the well-mannered researcher. Folke's flouting of the rules marks him out as a less than perfect researcher. The film does not judge Folke but the method he has to work with. The objective nature of the research translates on screen as cold, dispassionate voyeurism. Ethnography in *Kitchen Stories* is not the science of observing but a clumsy foolish exercise that imposes rules on both men. It is only when Folke climbs down from his 'pedestal' that he truly begins to understand Isak. Both the formal impartiality adopted by Folke and Isak's bizarre behaviour cease, and the two are no longer 'researcher' and 'participant' – simply friends.

The use of ethnographic approaches has rapidly developed in marketing research. Decision-makers are finding great support from the process and findings, as the following example illustrates.

Example

Demonstrating the value of air time[34]

Capital Radio has been looking at the way the radio affects people's lives. It wanted to show advertisers how listeners relate to the brand and to demonstrate the value of air time. It teamed up with the Henley Centre for a project called Modal Targeting, which highlighted different modes that listeners go through during the day. The intention was to establish when they were most susceptible to certain advertisements. On six occasions it sent researchers to observe listeners for three days at a time. They do not stay overnight, and they do not tell the people what they are looking for because that might affect the way they behave. The skill is that they blend into the background and almost become part of the fixtures and fittings. The study showed that there can be a greater difference between how one consumer feels at the start of the day and the end of the day than how two consumers feel at the same time of the day. Advertisers will now be able to be more effective as they know what 'mode' listeners are in. They should not be aiming to sell financial products when people are rushing for a train in the morning.

Ethnography cannot reasonably be classified as just another single method or technique.[35] In essence, it is a research discipline based upon culture as an organising concept and a mix of both observational and interviewing tactics to record behavioural dynamics. Above all, ethnography relies upon entering participants' natural life worlds – at home, while shopping, at leisure and in the workplace. The researcher essentially becomes a naive visitor in that world by engaging participants during realistic product usage situations in the course of daily life.

Whether called on-site, observational, naturalistic or contextual research, ethnographic methods allow marketers to delve into actual situations in which products are used, services are received and benefits are conferred. Ethnography takes place not in laboratories but in the real world. Consequently, clients and practitioners benefit from a more holistic and better nuanced view of consumer satisfactions, frustrations and limitations than in any other research method.[36]

A growing trend is for marketers to apply ethnographic methods in natural retail or other commercial environments. There are several objectives that lie behind these studies, one of which is orientated towards a detailed ecological analysis of sales behaviour. In other words, all of the elements that comprise retail store environments – lighting, smells, signage, display of goods, the location, size and orientation of shelving – have an impact upon the consumers' experience and their ultimate buying behaviour. The ethnographer's role is to decode the meaning and impact of these ecological elements. Often, these studies utilise time-lapse photography as a tool for behavioural observation and data collection over extensive periods of time and avoid actual interaction with consumers, as illustrated in the following example.[37]

Example **Top of the Pops[38]**

The point of purchase (POP) is a manufacturer's last opportunity to have an effect on the customers' decisions. Awareness of the crucial role of in-store influences is growing, and several POP companies have started offering detailed research on how customers react at the point of sale. To achieve this awareness, Electronic Surveillance of Behaviour (ESOB) gives a detailed understanding of how consumers behave in a shop. Kevin Price, Managing Director of Coutts Design, has formed a partnership with The In-Store Audit to utilise ESOB. Says Kevin:

with ESOB, shoppers are tracked remotely on video around the store and their movements and actions are followed. Because this technique is fairly unobtrusive, we are able to capture natural shopper behaviour as people are not being followed around by a researcher.

He goes on to explain the complexity of the computer software:

The cameras are specially modified and they record a large sample size. They can measure consumer behaviour from entry to exit, following customers around the store and noting the items they touch and the visual cues that they give and get. The cameras may operate for between 10 and 14 days. The information is then analysed and the key clips from the video are used to reinforce the key points that have emerged from the analysis.

One of the key elements of the above example is the context in which the consumer is behaving. The researcher observes shoppers, taking in and reacting to their retail experience, behaving naturally in the set context. The context of shoppers does not just mean the retail outlet they visit. The processes of choosing and buying products, of using products or giving them as gifts, of reflecting upon and planning subsequent purchases, are all affected by contextual factors. Context operates on several levels, including the immediate

physical and situational surroundings of consumers, as well as language, character, culture and history. Each of these levels can provide a basis for the meaning and significance attached to the roles and behaviour of consumption.

'Can we divorce the ways we buy, use and talk about products from the cultural and linguistic context within which economic transitions occur? The answer is an emphatic *no*.'[39]

The ethnographer may observe the consumer acting and reacting in the context of consumption. The ethnographer may see a shopper spending time reading the labels on cat food, showing different brands to his or her partner, engaged in deep conversation, pondering, getting frustrated and putting tins back on the shelf. The ethonographer may see the same shopper more purposefully putting an expensive bottle of cognac into a shopping trolley without any discussion and seemingly with no emotional attachment to the product. The ethnographer may want to know what is going on. How may the consumer explain his or her attitudes and motivations behind this behaviour? This is where the interplay of observation and interviewing helps to build such a rich picture of consumers. In questioning the shopper in the above example, responses of 'we think that Rémy Martin is the best' or 'we always argue about which are the prettiest cat food labels' would not be enough. The stories and contexts of how these assertions came to be would be explored. The ethnographer does not tend to take simple explanations for activities that in many circumstances may be habitual to consumers. Ethnographic practice takes a highly critical attitude towards expressed language. It challenges our accepted words and utterances at face value, searching instead for the meanings and values that lie beneath the surface. In interviewing situations, typically this involves looking for gaps between expressed and non-verbal communication elements. For example, if actual practices and facial and physical gestures are inconsistent with a subject's expressed attitudes towards the expensive cognac, we are challenged to discover both the reality behind the given answer and the reasons for the 'deception'.

Ethnographic research is also effective as a tool for learning situationally and culturally grounded language, the appropriate words for everyday things as spoken by various age or ethnic groups. Copywriters and strategic thinkers are always pressed to talk about products and brands in evocative and original ways. Ethnography helps act as both a discovery and an evaluation tool.[40] To summarise, ethnographic approaches are useful when the marketing research objectives call for:[41]

1 *High-intensity situations.* To study high-intensity situations, such as a sales encounter, meal preparation and service, or communication between persons holding different levels of authority.
2 *Behavioural processes.* To conduct precise analyses of behavioural processes, e.g. radio listening behaviour, home computer purchasing decisions or home cleaning behaviour.
3 *Memory inadequate.* To address situations where the participant's memory or reflection would not be adequate. Observational methods can stand alone or can complement interviewing as a memory jog.
4 *Shame or reluctance.* To work with participants who are likely to be ashamed or reluctant to reveal actual practices to a group of peers. If they were diabetic, for example, participants may be reluctant to reveal that they have a refrigerator full of sweet snacks, something that an ethnographic observer would be able to see without confronting the subject.

In these applications, the ethnographer is expected to analyse critically the situations observed. The critique or analysis can be guided by theory but in essence the researcher develops a curiosity, thinks in an abstract manner and at times steps back to reflect and see how emerging ideas connect. By reacting to the events and participants as they face them, to draw out what they see as important, ethnographers have the ability to create

new explanations and understandings of consumers. This ability to develop a new vision, to a large extent unrestricted by existing theory, is the essence of a grounded theory approach, which is explained and illustrated in the next section.

Grounded theory

Grounded theory
Theory derived from data, systematically gathered and analysed.

The tradition of **grounded theory** was developed by Glaser and Strauss in the late 1950s and published in their seminal work in 1967.[42] At that time, qualitative research was viewed more as impressionistic or anecdotal, little more than 'soft science' or journalism.[43] It was generally believed that the objective of sociology should be to produce scientific theory, and to test this meant using quantitative methods.[44] Qualitative research was seen to have a place, but only to the extent to which it developed questions which could then be verified using quantitative techniques. Glaser and Strauss accepted that the study of people should be scientific, in the way understood by quantitative researchers. This meant that it should seek to produce theoretical propositions that were testable and verifiable, produced by a clear set of replicable procedures. Glaser and Strauss defined theory as follows:

> theory in sociology is a strategy for handling data in research, providing modes of conceptualization for describing and explaining. The theory should provide clear enough categories and hypotheses so that crucial ones can be verified in present and future research; they must be clear enough to be readily operationalized in quantitative studies when these are appropriate.[45]

The focus upon developing theory was made explicit in response to criticisms of ethnographic studies that present lengthy extracts from interviews or field observations. Strauss sought to reinforce his view of the importance of theory, illustrated by the following quote:

> much that passes for analysis is relatively low level description. Many quite esteemed and excellent monographs use a great deal of data, quotes or field note selections. The procedure is very useful when the behavior being studied is relatively foreign to the experiences of most readers or when the factual assertions being made would be under considerable contest by skeptical and otherwise relatively well-informed readers. Most of these monographs are descriptively dense, but alas theoretically thin. If you look at their indexes, there are almost no new concepts listed, ones that have emerged in the course of research.[46]

In contrast to the perhaps casual manner in which some ethnographers may be criticised for attempts at developing theory, the grounded theorist follows a set of systematic procedures for collecting and analysing data. This systematic procedure is used to encourage researchers to use their intellectual imagination and creativity to develop new theories, to suggest methods for doing so, to offer criteria to evaluate the worth of discovered theory, and to propose an alternative rhetoric of justification.[47] The most distinctive feature of grounded theory is its commitment to 'discovery' through direct contact with the social phenomena under study, coupled with a rejection of a priori theorising. This feature does not mean that researchers should embark on their studies without any general guidance provided by some sort of theoretical understanding. It would be nigh on impossible for a researcher to shut out the ideas in the literature surrounding a particular subject. However, Glaser and Strauss argued that preconceived theories should be rejected as they obstruct the development of new theories by coming between researchers and the subjects of their study. In other words, the strict adherence to developing new theory built upon an analytical framework of existing theory can result in 'narrow-minded' researchers who do not explore a much wider range of explanations and possibilities. With the rejection of *a priori* theorising and a commitment to imaginative and creative discovery comes a conception of knowledge as emergent. This knowledge is created by researchers in the context

of investigative practices that afford them intimate contact with the subjects and phenomena under study.[18]

The following example illustrates the use of grounded theory in the development of theory related to the marketing of health visitors. The example is then followed by a description of the process involved in developing theory through a grounded theory process.[49]

Example | **Grounded theory and the marketing of health visitors[50]**

Grounded theory was used to conduct a study into the effectiveness of marketing related to health visiting. The collection and analysis of data were conducted simultaneously as the study worked through interviews and observations, all guided through theoretical sampling. There was a line-by-line analysis of interview transcripts with concepts drawn from these to describe events. Categories based on attitudes, behaviour and the characteristics of informants were built through constantly comparing the data in the transcripts and the emerging concepts. The theory that emerged from this process was further guided by a contextual knowledge of the *conditions* under which any interactions took place, the nature of the interactions between the informants and health visitors, and the *consequences* of the actions and *interactions* undertaken by the informants. In addition, memos gathered throughout the process played a crucial part in developing the theory.

The findings and emergent theory centred around the attitudes of the health visitors' clients. The theory identified tactics which could enhance 'selling' in health visiting, strategies for gaining new clientele and methods for influencing behaviour in order to encourage the prevention of illness. The study addressed the nature of the 'process' of health visiting, and the need to promote the service through personal presentations and advertising. Further practical implications emerged from the study by identifying tactics for raising awareness by getting clients to recognise problems early.[51]

Attempting to gain an objective viewpoint

For the grounded theorist, data collection and analysis occur in alternating sequences. Analysis begins with the first interview and observation, which leads to the next interview or observation, followed by more analysis, more interviews or fieldwork, and so on. It is the analysis that drives the data collection. Therefore there is a constant interplay between the researcher and the research act. Because this interplay requires immersion in the data, by the end of the enquiry the researcher is shaped by the data, just as the data are shaped by the researcher. The problem that arises during this mutual shaping process is how one can become immersed in the data and still maintain a balance between objectivity and sensitivity. Objectivity is necessary to arrive at an impartial and accurate interpretation of events. Sensitivity is required to perceive the subtle nuances and meanings of data and to recognise the connections between concepts. Both objectivity and sensitivity are necessary for making discoveries. Objectivity enables the researcher to have confidence that the findings are a reasonable, impartial representation of a problem under investigation, whereas sensitivity enables creativity and the discovery of new theory from data.[52]

During the analytic process, grounded researchers attempt to set aside their knowledge and experience to form new interpretations about phenomena. Yet, in their everyday lives, they rely on knowledge and experience to provide the means for helping them to understand the world in which they live and to find solutions to problems encountered. Most researchers have learned that a state of complete objectivity is impossible and that in every piece of research, quantitative or qualitative, there is an element of subjectivity. What is important is to recognise that subjectivity is an issue and that researchers should take appropriate measures to minimise its intrusion into their investigations and analyses.

In qualitative research, objectivity does not mean controlling the variables. Rather it means an openness, a willingness to listen and to 'give voice' to participants, be they individuals or organisations. Though this may seem odd, listening is not necessarily a quality that some researchers possess. The following example illustrates the challenges of 'listening'.

Example   **Listening is not the same as researching[53]**

According to the Coca-Cola Retail Research Group study, the German discount supermarket Aldi is now the strongest retail brand in Europe. Dieter Brandes was an architect of Aldi's success, and contends that in reaching this position, Aldi never had a 'grand' strategy. 'We just groped our way forward. It was a dynamic process driven by intuition, incremental adjustments and decisions, whose consequences were not always foreseeable.' This approach is one of being endlessly curious and being confident to take an experimental approach with much thinking and reflection. The essence of this curiosity is listening. Listening is not the same as researching. Research pursues a pre-identified agenda, that of the researcher. Listening gives other people's agendas top priority. Because it can pick up looming dangers and new opportunities, listening lies at the heart of effective innovation. But it is very hard to do.

Thus, good qualitative research means hearing what others have to say, seeing what others do and representing these as accurately as possible. It means developing an understanding of those they are researching, whilst recognising that researchers' understandings are often based on the values, culture, training and experiences that they bring from all aspects of their lives; these can be quite different from those of their participants.[54] As well as being open to participants, qualitative researchers reflect upon what makes them, as observers, 'see' and 'listen' in particular ways. This usually means that, while working on a particular project, the researcher keeps a diary or journal. This diary is used to make notes about the conditions of interviews and observations, of what worked well and what did not, of what questions the researcher would have liked to ask but did not think of at the time. As the researcher reads through the diary in the analysis process, the entries become part of the narrative explored, and reveal to the researcher and to others the way the researcher has developed their 'seeing' and 'listening'. Research diaries will be covered in more detail in examining qualitative data analysis in Chapter 9.

Developing a sensitivity to the meanings in data

Having sensitivity means having insight into, and being able to give meaning to, the events and happenings in data. It means being able to see beneath the obvious to discover the new. This quality of the researcher occurs as they work with data, making comparisons, asking questions, and going out and collecting more data. Through these alternating processes of data collection and analysis, meanings that are often elusive at first later become clearer. Immersion in the data leads to those sudden insights.[55] Insights do not just occur haphazardly; rather, they happen to prepared minds during interplay with the data. Whether we want to admit it or not, we cannot completely divorce ourselves from who we are and what we know. The theories that we carry around in our heads inform our research in multiple ways, even if we use them quite unselfconsciously.[56]

Ultimately, a grounded theory approach is expected to generate findings that are meaningful to decision-makers, and appropriate to the tasks they face. As with other interpretivist forms of research, if it is found meaningful by decision-makers and employed successfully by them, there is further evidence of the theory's validity. Another qualitative approach that is absolutely meaningful to decision-makers in that its primary focus is to deliver actionable results is called action research.

Action research

Background

The social psychologist Kurt Lewin had a main interest in social change and specifically in questions of how to conceptualise and promote social change. Lewin is generally thought to be the person who coined the term **action research** and gave it meanings that are applicable today.[57] In action research, Lewin envisaged a process whereby one could construct a social experiment with the aim of achieving a certain goal.[58] For example, in the early days of the Second World War, Lewin conducted a study, commissioned by the US authorities, on the use of tripe as part of the regular daily diet of American families. The research question was: 'To what extent could American housewives be encouraged to use tripe rather than beef for family dinners?' Beef was scarce and was destined primarily for the troops.

Lewin's approach to this research was to conduct a study in which he trained a limited number of housewives in the art of cooking tripe for dinner. He then surveyed how this training had an effect on their daily cooking habits in their own families. In this case, action research was synonymous with a 'natural experiment', meaning that the researchers in a real-life context invited participants into an experimental activity. This research approach was very much within the bounds of conventional applied social science with its patterns of authoritarian control, but it was aimed at producing a specific, desired social outcome.

The above example can be clearly seen from a marketing perspective. It is easy to see a sample survey measuring attitudes to beef, to tripe, to feeding the family and to feelings of patriotism. From a survey, one can imagine advertisements extolling the virtues of tripe, how tasty and versatile it is. But would the campaign work? Lewin's approach was not just to understand the housewives' attitudes but to engage them in the investigation and the solution – to *change* attitudes and behaviour.

Lewin is credited with coining a couple of important slogans within action research that hold resonance with the many action researchers that practise today. The first is 'nothing is as practical as a good theory' and the second is 'the best way to try to understand something is to change it'. In action research it is believed that the way to 'prove' a theory is to show how it provides an in-depth and thorough understanding of social structures, understanding gained through planned attempts to invoke change in particular directions. The appropriate changes are in the proof.

Lewin's work was a fundamental building block to what today is called action research. He set the stage for knowledge production based on solving real-life problems. From the outset, he created a new role for researchers and redefined criteria for judging the quality of the enquiry process. Lewin shifted the researcher's role from being a distant observer to involvement in concrete problem solving. The quality criteria he developed for judging a theory to be good focused on its ability to support practical problem solving in real-life situations.[59]

From Lewin's work has developed a rich and thriving group of researchers who have developed and applied his ideas throughout the world. In management research, the study of organisational change with the understanding and empowerment of different managers and workers has utilised action research to great effect. There has been little application of action research in marketing research, though that is changing. Marketing researchers and marketing decision-makers alike are learning of the nature of action research, the means of implementing it and the benefits it can bestow.

Action research
A team research process, facilitated by a professional researcher(s), linking with decision-makers and other stakeholders who together wish to improve particular situations.

Approach

The term 'action research' includes a whole range of approaches and practices, each grounded in different traditions, in different philosophical and psychological assumptions, sometimes pursuing different political commitments. Sometimes it is used to describe a positivist approach in a 'field' context, or where there is a trade-off between the theoretical interests of researchers and the practical interests of organisation members. Sometimes it is used to describe relatively uncritical consultancy based on information gathering and feedback.[60] It is beyond the scope of this text to develop these different traditions, so the following describes an approach that is grounded in the Lewin foundations of the approach, and, like his work, is applicable to marketing.

Action research is a team research process, facilitated by one or more professional researchers linking with decision-makers and other stakeholders who together wish to change or improve particular situations. Together, the researcher and decision-makers or stakeholders define the problems to be examined, generate relevant knowledge about the problems, learn and execute research techniques, take actions, and interpret the results of actions based on what they have learned.[61] There are many iterations of problem definition, generating knowledge, taking action and learning from those actions. The whole process of iteration evolves in a direction that is agreed by the team.

Action researchers accept no a priori limits on the kinds of research techniques they use. Surveys, statistical analyses, interviews, focus groups, ethnographies and life histories are all acceptable, if the reason for deploying them has been agreed by the action research collaborators and if they are used in a way that does not oppress the participants.

Action research is composed of a balance of three elements. If any one of the three is absent, then the process is not action research.

1 *Research.* Research based on any quantitative or qualitative techniques, or combination of them, generates data and, in the analyses and interpretation of the data there is shared knowledge.
2 *Participation.* Action research involves trained researchers who serve as facilitators and 'teachers' to team members. As these individuals set their action research agenda, they generate the knowledge necessary to transform the situation and put the results to work. Action research is a participatory process in which everyone involved takes some responsibility.
3 *Action.* Action research aims to alter the initial situation of the organisation in the direction of a more self-managed and more rewarding state for all parties.

An example of an action research team in marketing terms could include:

- *Marketing researchers*: trained in a variety of qualitative and quantitative research techniques, and with experience of diagnosing marketing and research problems.
- *Strategic marketing managers*: decision-makers who work at a strategic level in the organisation and have worked with researchers, as well as those who have no experience of negotiating with researchers.
- *Operational marketing managers*: decision-makers who have to implement marketing activities. These may be the individuals who meet customers on a day-to-day basis and who really feel the impact and success of marketing ideas.
- *Advertising agency representatives*: agents who have worked with strategic decision-makers. They may have been involved in the development of communications campaigns to generate responses from target groups of consumers.
- *Customers*: existing customers who may be loyal and have had many years of experience of the company (initiating and funding the action research) its products and perhaps even its personnel.
- *Target customers*: potential customers who may be brand switchers or even loyal customers to competitive companies.

Figure 6.2[62] illustrates how action research may be applied. This model of action research is taken from the subject area of the management of change, which is relevant to many of the problems faced by marketing decision-makers. The process aims to create a learning community in a team such as that above. The team develops an understanding of issues to the extent that it makes sound judgements and takes effective action to implement the changes it wishes to make.

The process in Figure 6.2 can be described as follows.

- *Diagnosis.* The present state of affairs would be set out, including the perceived barriers to change and an initial broad statement of desired direction for the organisation. Diagnosis would include documenting the change process and all data gathering activities such as secondary data gathering, surveys, interviews or observations.
- *Analysis.* An initial interpretation of data gathered would be made. From this the issues to be tackled would be identified. Summary findings and the development of a framework, with set tasks for team members in subsequent data gathering, would be drawn up.
- *Feedback.* Data analyses would be fed back for examination and discussion in the team. 'Ownership' of the diagnosis would be developed to formulate a commitment to action.
- *Action.* Individual courses of action and the development of broader strategies would be formulated.
- *Evaluation.* There would be an ongoing review of methods and outcomes. The effectiveness of any action would be evaluated against agreed criteria and critical success factors.

All of these stages are interrelated, so there is no definitive path that the team would take. In subsequent iterations of activities, the team could move around the stages in any order that suits its needs.

The process is illustrated in the following example where action research was used to evaluate a youth Drop-In Centre. The detail of the case is limited, but there is sufficient to see action research being successfully practised in an area that could be considered as a marketing research challenge. It also presents the challenge of what other research designs could have worked in these circumstances?

Figure 6.2
The action research approach

Example

Creating 'The Kit'[63]

A Drop-In Centre for street-involved youth, in a Canadian city, had been running for four years and it was time to evaluate its services. The Centre's mission and clientele were controversial. Some people felt that a safe place to 'hang out' met the initial needs of street-involved youth and allowed staff to reach out informally, build trust, and intervene effectively in crises. Others wanted more structured activities and stricter rules, whilst others thought the Centre attracted 'high-risk' youth to the area and wanted it shut down completely. The evaluation, identified four objectives:

1 To involve youth in designing and implementing an evaluation to measure the impact of Drop-In services.
2 To improve service delivery to youth.
3 To collaborate with community members on long-term solutions to help integrate street youth into the community.
4 To make the evaluation instrument available to other youth centres.

A team was built of six youth, two staff members and one outside professional researcher. The group met two afternoons per week at the Drop-In. The evaluation began with the team considering three questions: 'What do we want to know?', 'How will we find out?' and 'Who do we need to talk to?' The team worked together and in small groups to develop the initial questionnaire. Framing questions that would get the information it wanted was a lengthy process, with many drafts and redrafts. The team moved on to try alternative methods with the youth working together to develop tools that would fit the Centre milieu and engage other street-involved youth. When the tools were ready, each session was advertised in the Drop-In, with pizza as an incentive for participation. An iterative process was established for data analysis, 'walking through' responses to open-ended questions to learn the principles and techniques of analysis. The youth worked in pairs to describe and summarise the data. The team produced a formal report, a 'Kit' and participated in community and academic presentations about its work. The formal written report was produced by everyone brainstorming the contents, the professional researcher drafting each section, submitting it for feedback to the team and redrafting. The result was a thorough, well-crafted document. The youth took the main role in community and academic presentations. Sharing their expertise publicly helped them gain confidence and pride in their hard work and impressive results. Perhaps the most interesting reporting mechanism was 'The Kit', a colourful guide for other youth evaluators. 'The Kit' was designed and produced entirely by the youth team members.

Ethics in marketing research

The researcher and the client must respect participants when conducting qualitative research. This should include protecting the anonymity of participants, not misleading or deceiving them, conducting research in a way not to embarrass or harm the participants, and using the research results in an ethical manner.[64]

The above advice from the Market Research Society contrasts sharply with a controversial approach to retail research that sometimes goes by the name of 'guerrilla ethnography' or 'street research'. This involves observing and talking with consumers in their natural habitats. Researchers in this case commonly do not identify their role as a researcher, nor do they formally state the objectives behind their interaction with consumers. Instead, through the normal course of chatting with fellow customers or sales personnel, an attempt is made to glean information about customer preferences, sales cues and customer language. The benefit here is that the social distance and formal barriers between researcher and subject are broken down and interaction is more 'natural' and

less subject to contrivance. The main objection expressed by critics is the potential invasion of privacy and somewhat manipulative structure of interaction, and the confusion that may be caused by not being absolutely open to those being observed or questioned.[65]

In 1994, addressing the ESOMAE Annual Conference, Karl Vorsteen, chairman of Heineken exhorted the virtues of observing consumers. He positively encouraged his managers to visit bars to see consumers enjoying their products in their natural context. This he saw as part of a natural curiosity that decision-makers should have of their customers. Decision-makers naturally meet many of their customers on a day-to-day basis, especially sales personnel, and much is to be learned from these encounters. As long as these encounters respect the anonymity of participants, do not mislead or deceive them, and in no way embarrass or harm them, these encounters are a healthy part of conducting business.

It is up to the researcher to be aware of the harm that participants may suffer and the damage such harm will inflict on all parties involved in an investigation. A reminder of why researchers must be aware of the potential for harm is presented in the following example.

Example

The need to pay greater attention to issues of the balance of power, to ensure public cooperation[66]

There are two primary reasons why researchers must be aware of the potential harm to participants and the need to foster a continual willingness to cooperate in research:

1 Qualitative research is doubly dependent on public cooperation. Not only do we rely on participants' cooperation in taking part, but the non-directive and open-ended nature of qualitative questioning techniques means that we also rely on their being positively engaged by the process, willing and eager to apply their minds, and happy to reveal their thoughts.
2 The nature of qualitative interviews and groups means that moderators will always try to encourage participants to reveal more. This brings with it a responsibility to ensure that safeguards are in place, to deter coercion and avoid the potential danger of abuse of power and control over participants in qualitative research.

Internet and computer applications

The Internet presents huge opportunities for the qualitative researcher. Computer-mediated communication (CMC) can be used to run online versions of semi-structured or in-depth interviews, 'observation' of virtual communities, the collection of personal documents, and focus groups. Applying these techniques using the Internet rather than face to face presents a whole array of advantages and challenges.[67] These may be summarised as follows.

Advantages

- *Extending access to participants.* Provided that potential participants have access to the technology, researchers can cross time and space barriers. They can reach a much wider geographical span of participants, and also populations that are normally hard to reach, such as people with disabilities.

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- *Sensitive subjects.* For some participants the sensitivity of the subject being studied may mean that they would not discuss it in a face-to-face manner. The anonymity and distance can help to draw out views from such participants.
- *Interest groups.* A variety of online formats, such as chat rooms, mailing lists and conferences, focus on specific topics, drawing together geographically dispersed participants who may share interests, experiences or expertise.
- *Cost and time savings.* Issues such as the time and travelling expenses of researchers, the hire of venues and the costs of producing transcripts can make face-to-face interviewing an expensive option for many researchers, especially if they are using qualitative approaches for the first time. The Internet dramatically reduces or eliminates many of these costs and thus makes qualitative approaches more accessible to a wider array of companies and decision-makers.
- *Handling transcripts.* As interviews or observations are built up through dialogue on the Internet, many of the potential biases or mistakes that occur through audio recordings can be eliminated.

Challenges

- *Computer literacy for the researcher.* Applying qualitative research on the Internet means that some degree of technical expertise is required of the researcher. The extent of expertise depends upon which techniques are being used. For example, moderators of focus groups online will have to learn about the capabilities of the chosen software for running a focus group. They will also have to learn about the specific skills in making the group experience work well online, perhaps by participating in online research conferences or gaining exposure to alternative discussion practices online.
- *Making contact and recruitment.* Establishing contact online requires a mutual exchange of email addresses. There is an array of techniques that can encourage potential participants to reveal their address (which will be developed in Chapters 7 and 8) but in essence the researcher has to develop rapport and trust to draw the most out of participants.
- *Interactive skills online.* Even if the researcher develops his or her skills online, it must be remembered that participants use their computing equipment with varying degrees of expertise.
- *Losing access.* A key challenge for online studies is to sustain electronic connection with participants for the whole period of the qualitative research process. This is a reminder that, unlike a survey which may be a short, one-off contact with a participant, qualitative techniques may unfold and evolve over time and involve returning to participants as issues develop and theory emerges.

The issues above lay out the broad advantages and challenges of the Internet for the qualitative researcher. As we develop more detailed descriptions and evaluations of qualitative techniques in Chapters 7 to 9, we will examine these points in more detail as there are many rapid innovations occurring to support qualitative researchers.

The impact of the Internet has had a profound effect upon how qualitative research is conducted, especially the geographic extent, the nature of data that can be gathered and the sharing and communicating of its analysis. The following example is an illustration of this impact. It is just one of the means that the Internet and mobile phone technology can significantly improve qualitative data gathering and analysis.

Example   **Red Bull re-energising its customer feedback teams[68]**

Red Bull was facing an 'administrative nightmare'. Its energy teams – roving groups of employees who meet directly with consumers to discuss the product and collect customer feedback – were having to fax details of their meetings with consumers through to head office. They were getting stacks of paper through that took a lot of time to compile into anything worthwhile. What they wanted was a system that gave them 'real-time' results. Blue Trail (**www.bluetrail.co.uk**), a mobile technology specialist, was chosen to implement a new system. Each of Red Bull's 30 energy teams (consisting of 4 people each) was given an IPAQ pocket PC which was used to store customer responses. Information was then uploaded via Orange mobile phones to a Red Bull web page, hosted by Blue Trail. The programme drives a workforce that can be used for multiple tasks, including trade audits and customer research. Most recently, the IPAQs were equipped with Nexicam digital camera attachments. The energy teams have always been asked to produce photographic diaries, but the use of the Nexicam enables the images to be used for a fraction of the cost of conventional photography.

Summary

Qualitative and quantitative research should be viewed as complementary. Unfortunately, many researchers and decision-makers do not see this, taking dogmatic positions in favour of either qualitative or quantitative research. The defence of qualitative approaches for a particular marketing research problem, through the positive benefits it bestows and through explaining the negative alternatives of a quantitative approach, should be seen as healthy, as should the defence of quantitative approaches. Business and marketing decision-makers use both approaches and will continue to need both.

Qualitative and quantitative approaches to marketing research are underpinned by two broad philosophical schools, namely positivism and interpretivism. The central belief of a positivist position is a view that the study of consumers and marketing phenomena should be 'scientific' in the manner of the natural sciences. Marketing researchers of this persuasion adopt a framework for investigation akin to that of the natural scientist. The interpretivist researcher does not set out to test hypotheses but to explore the nature and interrelationships of marketing phenomena. The focus of investigation is a detailed examination of a small number of cases rather than a large sample. The data collected are analysed through an explicit interpretation of the meanings and functions of consumer actions. The product of these analyses takes the form of verbal descriptions and explanations, with quantification and statistical analysis playing a subordinate role.

In examining qualitative approaches, ethnography as a general term includes observation and interviewing and is sometimes referred to as participant observation. It is, however, used in the more specific case of a method which requires a researcher to spend a large amount of time observing a particular group of people, by sharing their way of life. The ethnographer is expected to analyse critically the situations observed. The critique and the analysis can be guided by theory but in essence the researcher develops a curiosity, thinks in an abstract manner and at times steps back to reflect and see how emerging ideas connect. By reacting to the events and participants as they face them, to draw out what they see as important, ethnographers have the ability to create new explanations and understandings of consumers.

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Some ethnographers may be criticised in their attempts at developing theory. In response, the grounded theorist follows a set of systematic procedures for collecting and analysing data. A distinctive feature of a grounded theory approach is that the collection of data and its analysis take place simultaneously, with the aim of developing general concepts, to organise data and integrate these into a more general, formal set of categories.

Ethnographic techniques and a grounded theory approach can be applied in an action research framework. Action research is a team research process, facilitated by one or more professional researchers, linking with decision-makers and other stakeholders who together wish to improve particular situations. Together, the researcher and decision-makers or stakeholders define the problems to be examined, generate relevant knowledge about the problems, learn and execute research techniques, take actions, and interpret the results of actions based on what they have learned. There are many iterations of problem definition, generating knowledge, taking action and learning from those actions. The whole process of iteration evolves in a direction that is agreed by the team.

The Internet presents huge opportunities for the qualitative researcher. Computer-mediated communication (CMC) can be used to run online versions of semi-structured or in-depth interviews, 'observation' of virtual communities, the collection of personal documents, and focus groups. Being able to conduct such techniques online offers great opportunities to the qualitative marketing researcher and also many challenges.

When conducting qualitative research, the researcher and the client must respect participants. This should include protecting the anonymity of participants, honouring all statements and promises used to ensure participation, and conducting research in a way not to embarrass or harm the participants.

Questions

1   What criticisms do qualitative marketing researchers make of the approaches adopted by quantitative marketing researchers, and vice versa?

2   Why is it not always possible or desirable to use quantitative marketing research techniques?

3   Evaluate the differences between a European and an American approach to qualitative research.

4   Describe the characteristics of positivist and interpretivist marketing researchers.

5   In what ways may the positivist and the interpretivist view potential research participants?

6   What role does theory play in the approaches adopted by positivist and interpretivist marketing researchers?

7   What does ethnographic research aim to achieve in the study of consumers?

8   Why may marketing decision-makers wish to understand the context of consumption?

9   Describe and illustrate two research techniques that may be utilised in ethnographic research.

10 What stages are involved in the application of a grounded theory approach?

11 Is it possible for marketing researchers to be objective?

12 Why may the Kurt Lewin case of action research be deemed an application of marketing research?

13 Describe the key elements to be balanced in the application of action research.

14 Describe the five interrelated phases of an action research approach.

15 What do you see as the key advantages and challenges of conducting qualitative research using the Internet?

Exercises

1. An advertising agency has selected three pieces of music that it could use in a new advertising campaign. It has come to you as a marketing researcher to help in making the case for selecting the right piece of music for the campaign. What would be the case for using qualitative techniques for this task?

2. Would a 12-year-old schoolchild who has not been exposed to any academic theories about 'service delivery quality' be more creative and open-minded, and thus better suited to conduct a grounded theory approach, compared with a 22-year-old business studies graduate? Would your view change in any way if the study were about a game or toy that was specifically targeted at 12 year olds?

3. You are a brand manager for Lynx deodorant. You wish to invest in an ethnographic study of young men. Ask another student to play the role of marketing director. What case would you make to the marketing director about the value of investing in an ethnographic study?

4. In the above case of an ethnographic study of young men for Lynx deodorant, what would you feel to be appropriate contexts or circumstances to conduct this work?

5. In a small group discuss the following issues: 'Quantitative research is more important than qualitative research because it generates conclusive findings' and 'Qualitative research should always be followed by quantitative research to confirm the qualitative findings'.

Video Case Exercise: Wild Planet

What does ethnographic research mean for Wild Planet? How do they conduct ethnographic techniques? What challenges do they face in conducting these techniques?

video case
download from
www.pearsoned.co.uk/
malhotra_euro

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