

# Qualitative Marketing Research

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and Kjell Gronhaug 2001

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## Preface

There have been many books describing and extolling the virtues of qualitative research methods in social sciences. Indeed, some of the leading texts have been published by Sage, who can be considered as pioneers in disseminating social science research and methodologies, particularly in relation to qualitative research.

This book is one of the latest in this lineage, and it attempts to bring different perspectives to the descriptions of qualitative research methods. Whilst it acknowledges its origins in social science research, it purposefully focuses upon what may be called management studies and most specifically the marketing domain.

Many of the foundations of marketing decision making are based on findings from market research. Recognition that markets and consumers represent a complex variety of views and perspectives led to the development of market research as a business function. Marketing learned to cope with increased market complexity by researching it in order to identify key issues and to try to anticipate and satisfy market requirements.

Early marketers, most notably those working in the advertising industry, used a simple format for researching consumers, through friendly/informal questioning and trials combined with some observation. As the perceived value of researching the market to aid marketing related decisions grew so too did the need for more formal techniques of research. The information requirement moved from intuitive trial and testing to seeking findings with a foundation of accuracy, dependability and reliability. Marketing is an *applied* social science and as such attracted many trained social scientists as market researchers. Coupled with the growth in the importance and contribution of marketing to business success was the growth of the 'science' of market research.

For many years market research was dominated by scientific approaches. Examples of this can be found in consumer opinion surveys employed for a wide range of reasons from assessing voter opinions and attitudes to monitoring consumer and economic trends in society. Research training for industry graduates was constructed around a curriculum displaying the best traditions of social science research, that of the 'one best method' which provided validity and reliability and demonstrated clear cause and effect. Indeed, any self-respecting researcher would naturally emphasize the dependability of their research by providing comprehensive descriptions of the methods used to gather the findings.

The place of qualitative research in this process was in the context of traditional social science research. Traditionally social scientists, when faced with a new phenomenon employed qualitative research methods such as in-depth interviews with key informants (people who know about or work within the domain of the phenomenon in question), and/or focus groups with people likely to be affected by the phenomenon. In this way the research issues and parameters were determined. Out of such findings, social science researchers would construct appropriate questions for surveying a wider audience. The expected outcomes would provide statements of generalization about a population as a whole. Thus the market research industry has developed 'tried and trusted' methods and tools for performing tasks with accuracy and reliability.

A significant characteristic of marketing is its peculiar and sometimes unique requirements. Marketing as a concept and function is unique in that it 'faces-out' from a business. Its purpose is to take things to the market and bring information and ideas back from the market. Because of the dynamics of any market, marketing activities and ideas are continuously changing and revising. Marketing for enterprises today will be different to yesterday's marketing and will change to something different again in the future. Because of this dynamic, marketing and marketers must constantly seek and gather information. Most enterprises have established information flows, whereby statistics on sales and fluctuations in these will be continuously monitored. However, such statistical information flows are not enough: marketers gather information and market intelligence intuitively and continuously as an everyday occurrence in doing business. This in turn contributes to and sometimes shapes the constant marketing flux. As the value of marketing to business grows and as new concepts and applications of marketing emerge and evolve, so to does the need for up to date market intelligence. Thus marketers' need for deep and detailed qualitative research becomes more crucial. Its importance lies in the need to *understand* phenomena and to gain meaningful insights into circumstances and changes. The contribution that qualitative research can make to this understanding and insight is immense, hence the rationale for this book.

The book is organized into three parts. Part I focuses on social science research and marketing. Chapter 1 outlines a philosophy of marketing in the context of science or art (activity). The chapter also considers the methodological implications of the choice of a philosophy. In addressing some of the social science research terminology we have been conscious of the danger of confusing the uninitiated reader by the use of this 'language'. To social science research scholars our discussions on types of research position, and the descriptive terms used in this position, would appear simplistic in many ways. We make no apology for this; instead we hope that scholars will recognize that we are trying to explain with brevity some quite complex terminology so that the new social science researcher might gain an appreciation of it. Also in regard to brevity, we have used

the terms that we believe fit most appropriately with aspects of our discussion, and in this context we state our own research position and philosophy.

Chapter 2 outlines the scope of research in marketing by addressing some perspectives of marketing, principally in two broad aspects, marketing management research and consumer research. The marketing management domain is viewed as an area that offers significant potential for new understanding and insights. Chapter 3 considers aspects of designing a research problem, specifically in terms of justification of the problem and the value of a research topic in marketing. We also consider the merits of using prior research dissemination in the literature both in formulating the research problem and in refining the topic. A brief mention is made of appropriate research methodologies. Chapter 4 considers the purpose of research in marketing from the perspectives of academic researchers, business researchers and somewhat unconventionally marketing *practitioner* (or DIY) researchers who require information for marketing.

Part II centres on the qualitative research methods best suited to marketing. We set the scene in Chapter 5 by justifying qualitative research methodologies, explaining their range and scope in the full spectrum of social science research. We also emphasize the value of *interpretive* research for qualitative research methodologies in marketing. Chapter 6 is about in-depth interviewing. We chose to address this method first because we consider it to be the bedrock for meaningful insights and understanding. Within the chapter we argue the value of *convergent* interviews as a means of gaining greater insights. Chapter 7, on case-based research, follows naturally from the previous chapter and in it we describe quite a rigorous case method approach in order to give a solid framework from which to build research cases. In addition though, we suggest that more interpretive approaches are possible and sometimes desirable. In Chapter 8, on focus group interviewing, we give a step by step framework for applying this method. Chapter 9 is about observation studies and the variety of types. Here we provide guidance on how to prepare for observation studies and an example in the context of marketing management in practice. Chapter 10 combines ethnography and grounded theory methodologies on the basis of their strong overlapping foundations. Finally in Part II, Chapter 11 addresses the various elements of action research and its relation to action learning.

Part III is about the applications and outcomes of qualitative research. In Chapter 12 we describe how to organize fieldwork and process qualitative data. We give some emphasis here to the value and use of *pictorial models* for visualizing data. Chapter 13 describes the writing process in the context of different reports for examiners, reviewers, practitioners and policy makers. Chapter 14 presents the notion of integrative multiple mixes of methodologies, which we argue enables the researcher to achieve the greatest insights and understanding of phenomena. Chapter 15, on future evolution of qualitative research, is a speculative look at the

potential future of methodologies in the marketing context. Rather than attempt to predict a *common* future we each make our own individual speculation, sight unseen of each other's contributions, in the hope that our personal creativity will not be stifled or overly influenced. The outcomes indicate both a unity and a diversity of views which is part of the richness of qualitative research methodology.



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# Part I      SOCIAL SCIENCE RESEARCH AND MARKETING

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## 1              Philosophy of Research

What is the purpose of considering a philosophy of research? Simply, to understand the philosophy that underpins the choices and decisions to be made in staking a research position. A research position will have implications for what, how and why research is carried out. Consideration of the philosophy of research helps to contribute a deeper and wider perspective of research so that our own specific research projects can have a clearer purpose within the wider context.

For most of its history the big question in social science has been: is social science scientific? This chapter addresses the question at a number of levels: philosophical, epistemological and methodological. Social science research in marketing, based on rigour, validity, cause and effect, precision in measurement and the pursuit of theory testing and building has led to the wide acceptance of the use of a variety of scientific approaches. Social science research in marketing has been concerned with accuracy of research outcomes, with the emphasis on gathering reliable data. Further, the scientific approaches of social science research have enabled and encouraged theory testing and development, which has contributed to enhancing the scope and perspectives of the marketing discipline.

The term *scientific* is drawn from the presupposition that natural science is the benchmark against which all cognitive endeavours should be measured; thus scientific language and words, such as *purposeful* and *systematic*, are often used to describe the nature of research. Similarly, by choosing a methodology, a researcher implies the use of certain 'rules and procedures' with different connotations and purposes, such as the logic used for arriving at insights and as a means of communication, so that other people can inspect and evaluate the research.

In this chapter we discuss the wide parameters of scientific research in order to take a position within these parameters. That is to say, this text does not belong to the full range and scope of the social science research paradigms, but is firmly positioned within a defined context of qualitative research. The justification for this positional context is the overriding

driver that social science research in marketing must have a clear *purpose* and, most importantly, must be relevant to the particular purpose of carrying out research in marketing.

### **The Philosophy of Marketing: Science or Art (Activity)?**

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There have been many debates about the nature of marketing. These have focused on whether marketing can be deemed to have genuine scientific foundations and approaches to research, or whether marketing is more akin to an art where aspects of marketing are created out of the imagination and vision of the marketer. In pursuit of the notion of *marketing science* or *scientific marketing*, much scholarly thought and energy has been devoted to searching for an all-encompassing theory of marketing or a cohesive collection of theories that will determine the objective rigour of the discipline.

The scope and range of the social science research paradigms is illustrated by the long running debate on whether marketing is a science or an art/activity. This issue has been raised over many years by both academics and practitioners of marketing (Brown 1996; Hunt 1976, 1990, 1994; McKenna 1986; Sheth et al. 1988). There have been many interpretations of the definition and purpose of marketing research. Two examples serve to highlight this point. The first represents the academic perspective:

#### **AN ACADEMIC DEFINITION OF MARKETING**

Marketing is a 'university discipline which aspires to be a professional discipline' . . . Its responsibilities are:

- To society, for providing objective knowledge and technically competent, socially responsible, liberally educated graduates;
- To students, for providing an education which will enable them to get on the socio-economic career ladder and prepare them for roles as competent, responsible marketers and citizens;
- To marketing practice, for providing a continuing supply of competent, responsible entrants to the marketing profession and for providing new knowledge about both the micro and macro dimensions of marketing;
- To the academy, for upholding not only its mission of retailing, warehousing and producing knowledge, but also its contract with society of objective knowledge for academic freedom and its core values of reason, evidence, openness and civility. (Hunt 1994: 21–22)

This academic view of marketing is clearly positioned in the scientific perspective of marketing research paradigms. The perspective of Hunt is that of a scientific researcher and marketing academic emphasizing

knowledge, not a business person. An alternative is offered by McKenna (1986), who may best be described as a consultant marketer whose view is from the perspective of business rather than academe:

#### A PRACTITIONER DEFINITION OF MARKETING

- Focus on 'understanding the market, moving with it, and forming relationships';
- 'Companies (must) view marketing as an educational process. The complexity and diversity of today's products confuses and intimidates many customers. When customers are confused, companies must find ways to educate them. When customers are intimidated, companies must find ways to reassure them';
- Marketing managers must 'be creative, smart, aggressive and open to change';
- Marketing is positioning between the product, market and company. (McKenna 1986: 8-9)

Comparison of these two perspectives highlights the professional position of both contributors. One is an academic and the other a practitioner. A superficial examination of the perspectives will suggest that Hunt (the academic) views marketing as a scientific discipline, while McKenna (the practitioner), views marketing as an *activity* more aligned to the dimensions of *art*. These two perspectives highlight variances when asking some fundamental questions. For example, is marketing a discipline? 'Yes', believe most academics; 'perhaps' say some practitioners with a high awareness of the wider aspects of marketing. Similarly, is marketing a science or is it merely science related? Again most academics will believe it to be a science or science related, whereas practitioners may not know or, more likely, will ask why such a question is deemed to be important. Consider, is marketing an activity? Only some academics will agree that it can be an activity (driven by knowledge: see Hunt's second point above), whereas almost all practitioners believe that it is.

These summary examples illustrate that, if marketing is positioned as a continuum with science/discipline at one end and applied/activity/art at the other end, most academics believe that marketing is a discipline which has scientific foundations whereas practitioners view marketing simply as an applied activity which may have creative (and artistic) foundations. The academic (scientific/ objective) approach is predicated on explaining and predicting phenomena, while the practitioner (artistic/ subjective) approach emphasizes describing and understanding phenomena. In such a continuum, academics and practitioners would seldom converge in their perspectives. Thus it is easy to detect a gulf between the two views outlined above. This need not be so, particularly in relation to research in marketing. Research in marketing may take a number of *positions*. Firstly, it is possible to be positioned firmly within the scientific marketing domain. Indeed, much of the academic research carried out and published in

academic journals can be said to hold such a position. Secondly, it is possible, indeed appropriate in certain circumstances, to be positioned in the practitioner/artistic domain where research will seek to solve practical problems and provide potential solutions to practical problems rather than seek to break new ground or establish new theories.

It can also be entirely appropriate to adopt a dual position, whereby a variety of research philosophies and positions can be adopted depending upon the circumstances prevailing and the nature of the topic or research problem. This book advocates that such a multiple approach and position is suitable for research in marketing management decision making and business problems/issues. Indeed, Borch and Arthur (1995: 423) claim that *both* approaches should be used, arguing that mixed methodologies would 'contribute to the richness' of the research. Their bipolar approach to research is common: for example, Easterby-Smith et al. (1991) in their book, *Management Research*, share it. In brief, a researcher's methodology may 'aim to blend the rigour of the scientific validity of objectivist research with the contextual elements and insights of subjectivist research' (Borch and Arthur 1995: 425).

A cornerstone of the present book's positional context is to suggest that instead of taking an extreme position of either a scientific or artistic approach, the blend of two approaches could be taken within the one large domain of interpretivism/relativism for marketing management contexts. We discuss this domain in our notes to this chapter.

The elements and characteristics of the dominant philosophies of research and how they impact upon research decisions, values and appropriateness for purpose are addressed in the following section.

## **Some Research Philosophies**

### **Ontology and epistemology**

We briefly discuss the meaning and perception of ontology and epistemology here. Essentially, ontology is *reality*, epistemology is the relationship between that reality and the researcher; and methodology is the technique(s) used by the researcher to discover that reality (Perry et al. 1999).

An ontology assuming that individuals have direct, unmediated access to the real world subscribes to the theory that it is possible to obtain hard, secure, objective knowledge about this single external reality (the basis of positivism, described in the following section). Conversely, an ontology which holds that individuals do not have direct access to the real world but that their knowledge of this perceived world (or worlds) is meaningful in its own terms and can be understood through careful use of appropriate interpretivist and relativist procedures is described in the following section.

## Positivism or interpretivism

The positivist ontology holds that the world is external and objective, therefore its epistemology is based on the belief that observers are independent and that science is value-free. The positivist or natural science school relates to the facts or causes of social phenomena and attempts to explain causal relationships by means of objective facts. Positivist research concentrates on description and explanation, where thought is governed by explicitly stated theories and hypotheses. A research topic is identified through the discovery of an external object of research rather than by creating the actual object of study. Researchers remain detached by maintaining a distance between themselves and the object of research; they try to be emotionally neutral and make a clear distinction between reason and feeling, science and personal experience. Positivists seek to maintain a clear distinction between facts and value judgements, search for objectivity and strive to use a consistently rational, verbal and logical approach to their object of research. Statistics and mathematical techniques for quantitative processing of data are central to the research methods adopted by researchers from the positivist school of research. Hence positivists use a set of specific *formalized* techniques for trying to discover and measure independent facts about a single reality which is assumed to exist, driven by natural laws and mechanisms.

Table 1.1 illustrates the broad definition of the positivist and interpretivist ontologies and epistemologies, and the characteristics of relevant methodologies for both philosophies.

Interpretivism (derived from the Greek *hermeneuein*, to interpret) is inspired by a series of other qualitative concepts and approaches. Tesch (1990) lists a total of 46 such possibilities, Patton (1990) lists 10 theoretical traditions, and Helenius (1990) makes a synthesis of seven traditions into the concept of hermeneutics. However the broad term *interpretivism* takes account of the most important characteristics of the research paradigm on the opposite side of the continuum from positivism. To summarize, the interpretivist approach allows the focus of research to be on *understanding* what is happening in a given context. It includes consideration of multiple realities, different *actors'* perspectives, researcher involvement, taking account of the contexts of the phenomena under study, and the contextual understanding and interpretation of data.

Positivism has been considered by many scientific researchers in the past to be the *correct* scientific paradigm. However, interpretivism avoids the rigidities of positivism in relation to certain types of problems in the social field. Instead of trying to explain causal relationships by means of objective 'facts' and statistical analysis, interpretivism uses a more personal process in order to *understand reality*. Thus the term *interpret* is important in this approach to research. The term *relativism* is often used also; this recognizes that in the social field (marketing) phenomena are relative to each other in some way as opposed to seeking to isolate variables as in

## 6 SOCIAL SCIENCE RESEARCH AND MARKETING

**Table 1.1** *Broad definitions/explanations of positivism, interpretivism, ontology, epistemology and methodology*

	Positivism	Interpretivism
<b>Ontology</b>		
Nature of 'being'/nature of the world	have direct access to real world	no direct access to real world
Reality	single external reality	no single external reality
<b>Epistemology</b>		
'Grounds' of knowledge/ relationship between reality and research	possible to obtain hard, secure objective knowledge	understood through 'perceived' knowledge
	research focuses on generalization and abstraction	research focuses on the specific and concrete
	thought governed by hypotheses and stated theories	seeking to understand specific context
<b>Methodology</b>		
Focus of research	concentrates on description and explanation	concentrates on understanding and interpretation
Role of researcher	detached, external observer	researchers want to experience what they are studying
	clear distinction between reason and feeling	allow feelings and reason to govern actions
	aim to discover external reality rather than creating the object of study	partially create what is studied, the meaning of the phenomena
	strive to use rational, consistent, verbal, logical approach	use of pre-understanding is important
	seek to maintain clear distinction between facts and value judgements	distinction between facts and value judgements less clear
	distinction between science and personal experience	accept influence from both science and personal experience
Techniques used by researcher	formalized statistical and mathematical methods predominant	primarily non-quantitative



positivist studies adhering to scientific rules. Our preference is for the term *interpretivism* because it accentuates the involvement and personal interpretive processes involved in understanding and making sense of phenomena in specific contexts in marketing.

Traditionally, positivism was based on empirical testing as the sole means of theory justification. After much antagonistic debate on the relevance of scientific theories for marketing phenomena (see for example *Journal of Marketing*, 47, Fall 1983 and *European Journal of Marketing*, 28 (3) 1994), there is now more general agreement that such a polarized position is not warranted, and indeed unnecessary. The idea of a 'sole means of theory justification cannot be maintained as a viable description of the scientific process or as a normative prescription for the conduct of scientific activities' (Anderson 1983: 25). In addition, no consensus exists as to the nature or the very existence of a unique scientific method. The search for research approaches other than those guided by pure positivism has led to a number of competing perspectives in the philosophy and sociology of science. However, wherever these perspectives have been derived from, they also need to be assessed to establish their value to research in marketing and marketing management domains.

There is no one best method and it is not appropriate to seek a single best method for the evaluation of marketing phenomena (Anderson 1983: 25). It will be more useful to look at the value and validity of a number of theories.

The position of this book in relation to ontology and epistemology is that we believe reality is socially constructed rather than objectively determined. Much of the focus of research in marketing is on understanding why things are happening. Therefore the task of the researcher in marketing should not only be to gather facts and measure how often certain patterns occur, but to appreciate the different constructions and meanings that people place upon their experience. The aim is to understand and explain why people (actors) have different experiences, rather than search for external causes and fundamental laws to explain their behaviour. Human action (especially in a marketing context) arises from the sense people make of different situations, rather than as a direct response to external stimuli (Easterby-Smith et al. 1991).

Let us take a moment to define and explain interpretive techniques as we perceive them (our *reality*) and their value in the context of research in marketing. The philosophies under the interpretivist umbrella incorporate a wide range of philosophical and sociological ideas such as hermeneutics, relativism, humanism, phenomenology and naturalism. These are primarily concerned with understanding human behaviour from the researcher's frame of reference. Figure 1.1 illustrates the range of philosophies in the context of positivist/scientific and interpretivist/relativist philosophies. The philosophies on the right side are positioned within the interpretivism domain of the continuum because we view them as being predominantly interpretivist. However, we also recognize that