

# Marketing Research

## Chapter 6

# Qualitative Research Tools

Lecturer: Dr. Michaella DeLeon Castillo  
Philippines

# LEARNING OUTCOMES

*After studying this chapter, you should be able to*

1. List and understand the differences between qualitative research and quantitative research
2. Understand the role of qualitative research in exploratory research designs
3. Describe the basic categories of qualitative research
4. Prepare a focus group interview outline
5. Recognize technological advances in the application of qualitative research approaches

# LEARNING OUTCOMES (cont'd)

*After studying this chapter, you should be able to*

6. Recognize common qualitative research tools and know the advantages and limitations of their use
7. Know the risks associated with acting on only exploratory results

# What is Qualitative Research?

- Qualitative Marketing Research
  - Research that addresses marketing objectives through techniques that allow the researcher to provide elaborate interpretations of market phenomena without depending on numerical measurement; its focus is on discovering true inner meanings and new insights.
- Researcher-Dependent
  - Research in which the researcher must extract meaning from unstructured responses such as text from a recorded interview or a collage representing the meaning of some experience.

# Uses of Qualitative Research

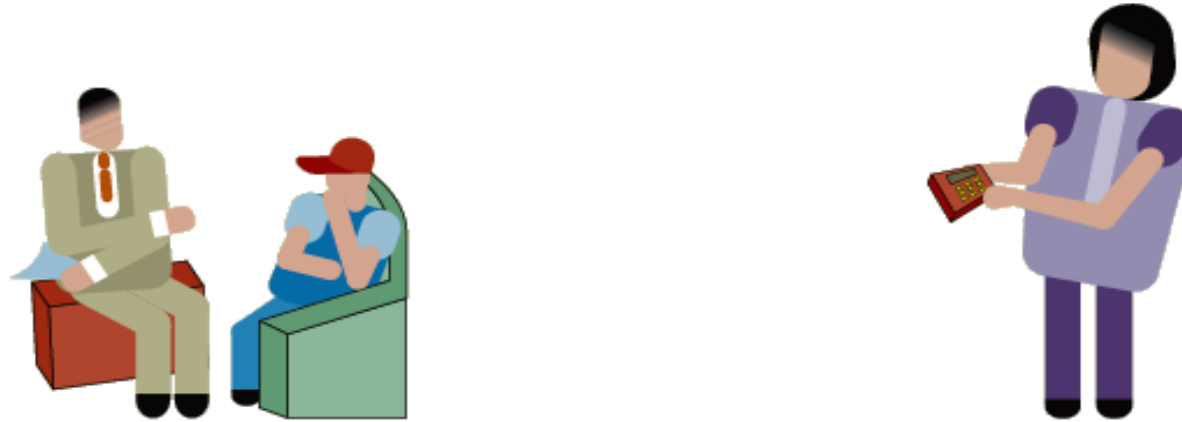
- Qualitative research is useful when:
  - It is difficult to develop specific and actionable decision statements or research objectives.
  - The research objective is to develop a detailed and in-depth understanding of some phenomena.
  - The research objective is to learn how consumers use a product in its natural setting or to learn how to express some concept in colloquial terms.
  - The behavior the researcher is studying is particularly context-dependent.
  - A fresh approach to studying the problem is needed.

# Qualitative “versus” Quantitative Research

- Quantitative Marketing Research
  - Is descriptive and conclusive.
    - Addresses research objectives through empirical assessments that involve numerical measurement and statistical analysis.
- Qualitative Marketing Research
  - Is exploratory.
    - Uses small versus large samples
    - Asks a broad range of questions versus structured questions
    - Subjective interpretation versus statistical analysis

## EXHIBIT 6.1

# Comparing Qualitative and Quantitative Research



Qualitative Research	Research Aspect	Quantitative Research
Discover Ideas, Used in Exploratory Research with General Research Objects	<b>Common Purpose</b>	Test Hypotheses or Specific Research Questions
Observe and Interpret	<b>Approach</b>	Measure and Test
Unstructured, Free-Forms	<b>Data Collection Approach</b>	Structured Response Categories Provided
Researcher Is Intimately Involved. Results Are Subjective.	<b>Researcher Independence</b>	Researcher Uninvolved Observer. Results Are Objective.
Small Samples—Often in Natural Settings	<b>Samples</b>	Large Samples to Produce Generalizable Results (Results that Apply to Other Situations)
Exploratory Research Designs	<b>Most Often Used</b>	Descriptive and Causal Research Designs

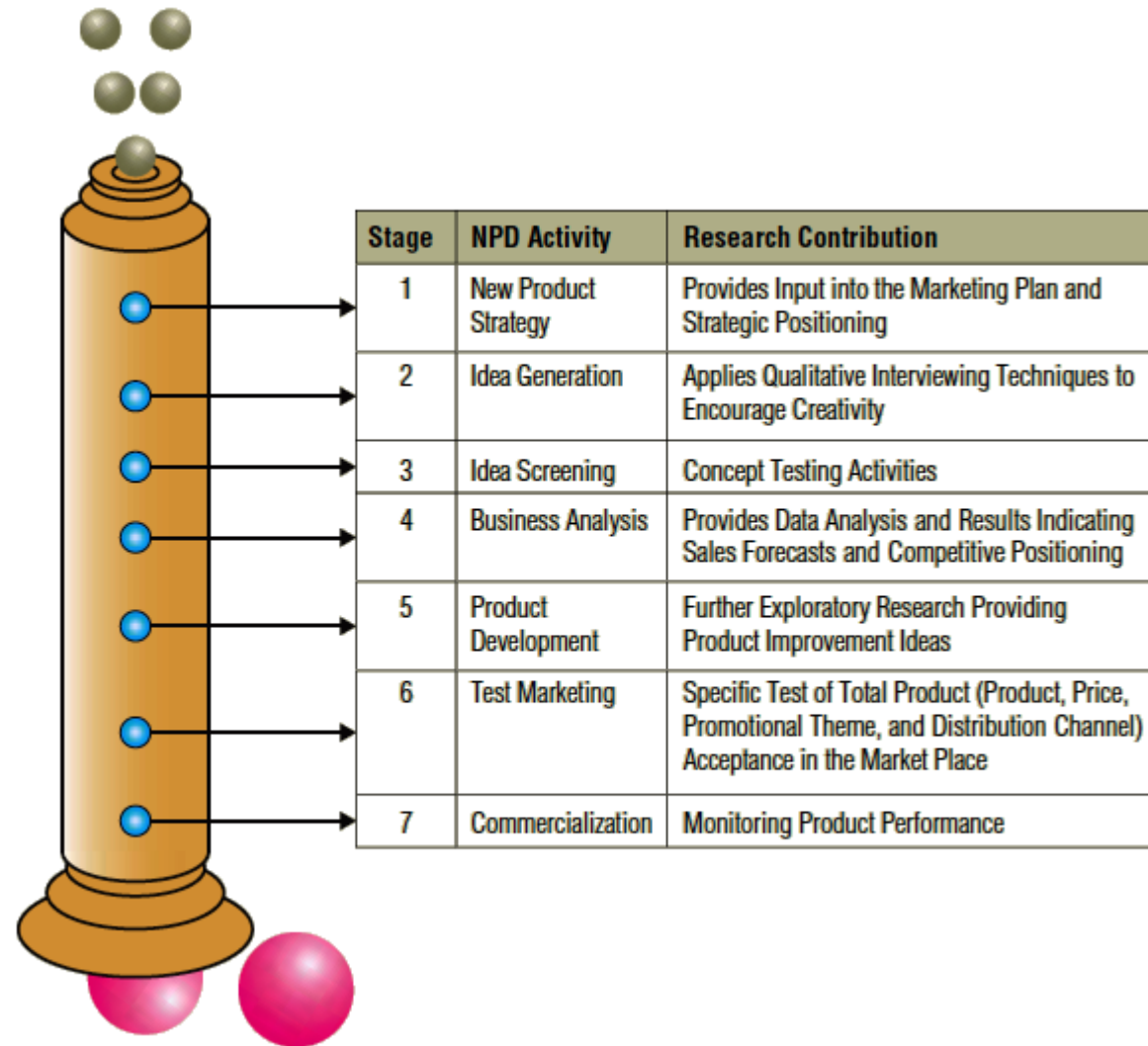
# Qualitative Approaches to Exploratory Research

- Qualitative Data
  - Data that are not characterized by numbers but rather are textual, visual, or oral
    - Focus is on stories, visual portrayals, meaningful characterizations, interpretations, and other expressive descriptions.
- Quantitative data
  - Represent phenomena by assigning numbers in an ordered and meaningful way.

# Idea Generation

- Concept Testing
  - A frequently performed type of exploratory research representing many similar research procedures all having the same purpose: to screen new, revised, or repositioned ideas.
    - Allows an initial evaluation prior to the commitment of any additional research and development, manufacturing, or other company resources.
    - Works best when it not only identifies ideas with potential and points out critical flaws, but it can also lead to important refinements.

## EXHIBIT 6.2 The Role of Research in the New Product Development (NPD) Process



# Qualitative Research Orientations

- Major Categories of Qualitative Research
  1. Phenomenology—originating in philosophy and psychology
  2. Ethnography—originating in anthropology
  3. Grounded theory—originating in sociology
  4. Case studies—originating in psychology and in business research

## EXHIBIT 6.3 Concept Statements for Two Seafood Products

### Squid Concept Alternative 1: CALAMARIOS

CALAMARIOS<sup>a</sup> are a new and different seafood product made from tender, boneless North Atlantic squid. The smooth white body (mantle) of the squid is thoroughly cleaned, cut into thin, bite-sized rings, then frozen to seal in the flavor. To cook CALAMARIOS, simply remove them from the package and boil them for only 8 minutes. They are then ready to be used in a variety of recipes.

For example, CALAMARIOS can be combined with noodles, cheese, tomatoes, and onions to make “Baked CALAMARIOS Cacciatore.” Or CALAMARIOS can be marinated in olive oil, lemon juice, mint, and garlic and served as a tasty squid salad. CALAMARIOS also are the prime ingredient for “Calamari en Casserole” and “Squid Italienne.” You may simply want to steam CALAMARIOS, lightly season them with garlic, and serve dipped in melted butter. This dish brings out the fine flavor of squid. A complete CALAMARIOS recipe book will be available free of charge at your supermarket.

CALAMARIOS are both nutritious and economical. Squid, like other seafood, is an excellent source of protein. CALAMARIOS can be found at your supermarket priced at \$6.50 per pound. Each pound you buy is completely cleaned and waste-free.

Because of their convenient versatility, ample nutrition, and competitive price, we hope you will want to make CALAMARIOS a regular item on your shopping list.

<sup>a</sup> Calamari is the Italian word for squid.

Glen L. Urban and John R. Hauser, *Design and Marketing of New Products* (Englewood Cliffs, NJ: Prentice Hall, 1980.) © 1980 Prentice Hall, Inc.

### Squid Concept Alternative 2: SCLAM CHOWDER

SCLAM CHOWDER is a delicious new seafood soup made from choice New England clams and tasty, young, boneless North Atlantic squid. Small pieces of clam are combined with bite-sized strips of squid and boiled in salted water until they are soft and tender. Sautéed onions, carrots, and celery are then added together with thick, wholesome cream, a dash of white pepper, and a sprinkling of fresh parsley. The entire mixture is then cooked to perfection, bringing out a fine, natural taste that will make this chowder a favorite in your household.

SCLAM CHOWDER is available canned in your supermarket. To prepare, simply combine SCLAM CHOWDER with 1½ cups of milk in a saucepan, and bring to a boil. After the chowder has reached a boil, simmer for 5 minutes and then serve. One can makes two to three servings of this hearty, robust seafood treat. Considering its ample nutrition and delicious taste, SCLAM CHOWDER is quite a bargain at \$3.89 per can.

Both clams and squid are high in protein, so high in fact that SCLAM CHOWDER makes a healthy meal in itself, perfect for lunches as well as with dinner. Instead of adding milk, some will want to add a cup of sour cream and use liquid chowder as an exquisite sauce to be served on rice, topped with grated Parmesan cheese.

However you choose to serve it, you are sure to find SCLAM CHOWDER a tasty, nutritious, and economical seafood dish.

# What Is a Phenomenological Approach to Research?

- Phenomenology
  - A philosophical approach to studying human experiences based on the idea that human experience itself is inherently subjective and determined by the context in which people live.
  - A very unstructured approach that avoids leading questions and provides every opportunity for new insights.

# What Is Hermeneutics?

- Hermeneutics
  - An approach to understanding phenomenology that relies on analysis of texts through which a person tells a story about him or herself.
- Hermeneutic Unit
  - Refers to a text passage from a respondent's story that is linked with a key theme from within the respondent's story or provided by the researcher.

# What Is Ethnography?

- Ethnography
  - Represents ways of studying cultures through methods that involve becoming highly active within that culture.
- Participant-Observation
  - An ethnographic research approach where the researcher becomes immersed within the culture that he or she is studying and draws data from his or her observations.

# What Is Grounded Theory?

- Grounded Theory
  - Represents an inductive investigation in which the researcher poses questions about information provided by respondents or taken from historical records; the researcher asks the questions to him or herself and repeatedly questions the responses to derive deeper explanations.

# What Are Case Studies?

- Case Studies
  - The documented history of a particular person, group, organization, or event.
- Themes
  - Are identified by the frequency with which the same term (or a synonym) arises in the narrative description.

## EXHIBIT 6.4 Common Qualitative Research Tools

Tool	Description	Type of Approach (Category)	Key Advantages	Key Disadvantages
Focus Group Interviews	Small group discussions led by a trained moderator	Ethnography, Case Studies	<ul style="list-style-type: none"> <li>• Can be done quickly</li> <li>• Gain multiple perspectives</li> <li>• Flexibility</li> </ul>	<ul style="list-style-type: none"> <li>• Results dependent on moderator</li> <li>• Results do not generalize to larger population</li> <li>• Difficult to use for sensitive topics</li> <li>• Expensive</li> </ul>
Depth Interviews	One-on-one, probing interview between a trained researcher and a respondent	Ethnography, Grounded Theory, Case Studies	<ul style="list-style-type: none"> <li>• Gain considerable insight from each individual</li> <li>• Good for understanding unusual behaviors</li> </ul>	<ul style="list-style-type: none"> <li>• Results dependent on researcher's interpretation</li> <li>• Results not meant to generalize</li> <li>• Very expensive</li> </ul>
Conversations	Unstructured dialogue recorded by a researcher	Phenomenology, Grounded Theory	<ul style="list-style-type: none"> <li>• Gain unique insights from enthusiasts</li> <li>• Can cover sensitive topics</li> <li>• Less expensive than depth interviews or focus groups</li> </ul>	<ul style="list-style-type: none"> <li>• Easy to get off course</li> <li>• Interpretations are very researcher-dependent</li> </ul>

## EXHIBIT 6.4 Common Qualitative Research Tools (cont'd)

Tool	Description	Type of Approach (Category)	Key Advantages	Key Disadvantages
Semi-Structured Interviews	Open-ended questions, often in writing, that ask for short essay-type answers from respondents	Grounded theory, ethnography	<ul style="list-style-type: none"> <li>• Can address more specific issues</li> <li>• Results can be easily interpreted</li> <li>• Cost advantages over focus groups and depth interviews</li> </ul>	<ul style="list-style-type: none"> <li>• Lack the flexibility that is likely to produce truly creative or novel explanations</li> </ul>
Word Association/ Sentence Completion	Records the first thoughts that come to a consumer in response to some stimulus	Grounded theory, case studies	<ul style="list-style-type: none"> <li>• Economical</li> <li>• Can be done quickly</li> </ul>	<ul style="list-style-type: none"> <li>• Lack the flexibility that is likely to produce truly creative or novel explanations</li> </ul>
Observation	Recorded notes describing observed events	Ethnography, grounded theory, case studies	<ul style="list-style-type: none"> <li>• Can be inobtrusive</li> <li>• Can yield actual behavior patterns</li> </ul>	<ul style="list-style-type: none"> <li>• Can be very expensive with participant-observer series</li> </ul>
Collages	Respondent assembles pictures that represent their thoughts/feelings	Phenomenology, Grounded theory	<ul style="list-style-type: none"> <li>• Flexible enough to allow novel insights</li> </ul>	<ul style="list-style-type: none"> <li>• Highly dependent on the researcher's interpretation of the collage</li> </ul>
Thematic Apperception/ Cartoon Tests	Researcher provides an ambiguous picture and respondent tells about the story	Phenomenology, Grounded theory	<ul style="list-style-type: none"> <li>• Projective, allows to get at sensitive issues</li> <li>• Flexible</li> </ul>	<ul style="list-style-type: none"> <li>• Highly dependent on the researcher's interpretation</li> </ul>

# Categories of Exploratory Research

- Experience Surveys
  - Asking knowledgeable individuals about a particular research problem
  - Most subjects are quite willing to participate.
- Secondary Data
  - Data collected for a purpose other than the project at hand.
    - Economical
    - Quick source for background information

# Categories of Exploratory Research (cont'd)

- Case Study Method
  - Intensely investigates one or a few situations similar to the problem
    - Investigate in-depth
    - Careful study
    - May require cooperation

# What is a Focus Group Interview?

- Focus Group Interview
  - An unstructured, free-flowing interview with a small group of around six to ten people led by a moderator who encourages dialogue among respondents.
- Advantage of Focus Group Interviews:
  1. Relatively fast
  2. Easy to execute
  3. Allow respondents to piggyback off each other's ideas
  4. Provide multiple perspectives
  5. Flexibility to allow more detailed descriptions
  6. High degree of scrutiny

# Focus Group Characteristics

- Focus Group Interviews
  - Unstructured
  - Free flowing
  - Group interview
  - Start with a broad topic and focus in on specific issues
- Group Composition
  - 6 to 10 people
  - Relatively homogeneous
  - Similar lifestyles and experiences

# The Focus Group Moderator

- Moderator
  - A person who leads a focus group interview and insures that everyone gets a chance to speak and contribute to the discussion.
- Qualities of a Good Moderator:
  - Must develop rapport with the group to promote interaction among all participants.
  - Must be a good listener.
  - Must try not to interject his or her own opinions.
  - Must be able to control discussion without being overbearing.

# Planning the Focus Group Outline

- Discussion Guide
  - A focus group outline that includes written introductory comments informing the group about the focus group purpose and rules and then outlines topics or questions to be addressed in the group session.

# Focus Group Discussion Guide

1. Welcome and introductions should take place first.
2. Begin the interview with a broad icebreaker that does not reveal too many specifics about the interview.
3. Questions become increasingly more specific as the interview proceeds.
4. If there is a very specific objective to be accomplished, that question should probably be saved for last.
5. A debriefing statement should provide respondents with the actual focus group objectives and answering any questions they may have.

# Video Conferencing and Streaming Media

- Videoconference Focus Groups
  - Marketing managers can watch on television rather than having to take a trip to a focus group facility.
- Streaming Media
  - Consist of multimedia content such as audio or video that is made available in real time over the Internet or a corporate intranet.

# Interactive Media and Online Focus Groups

- Online Focus Group
  - A qualitative research effort in which a group of individuals provides unstructured comments by entering their remarks into an electronic Internet display board of some type.
- Focus Blog
  - A type of informal, “continuous” focus group established as an Internet blog for the purpose of collecting qualitative data from participant comments.

# Online Versus Face-to-face Focus Group Techniques

- **Advantages**

- Fast
- Inexpensive
- Bring together many participants from widespread geographical areas
- Respondent anonymity
- Transcript automatically recorded

- **Disadvantages**

- Less group interaction
- Absence of tactile stimulation
- Absence of facial expression and body language
- Moderator's job is different

# Disadvantages of Focus Groups

- Focus groups:
  - Require objective, sensitive, and effective moderators.
  - May have unique sampling problems.
  - May not be useful for discussing sensitive topics in face-to-face situations.
  - Cost a considerable amount of money, particularly when they are not conducted by someone employed by the company desiring the focus group.

# Depth Interviews

- Depth Interview
  - A one-on-one interview between a professional researcher and a research respondent conducted about some relevant business or social topic.
- Laddering
  - A particular approach to probing asking respondents to compare differences between brands at different levels that produces distinctions at the attribute level, the benefit level, and the value or motivation level.

An interviewer (I) talks with Marsha (M) about furniture purchases. Marsha indirectly indicates she delegates the buying responsibility to a trusted antique dealer. She has already said that she and her husband would write the dealer telling him the piece they wanted (e.g., bureau, table). The dealer would then locate a piece that he considered appropriate and would ship it to Marsha from his shop in another state.

**M:** . . . We never actually shopped for furniture since we state what we want and (the antique dealer) picks it out and sends it to us. So we never have to go looking through stores and shops and things.

**I:** You depend on his (the antique dealer's) judgment?

**M:** Um, hum. And, uh, he happens to have the sort of taste that we like and he knows what our taste is and always finds something that we're happy with.

**I:** You'd rather do that than do the shopping?

**M:** Oh, much rather, because it saves so much time and it would be so confusing for me to go through stores and stores looking for things, looking for furniture. This is so easy that I just am very fortunate.

**I:** Do you feel that he's a better judge than . . .

**M:** Much better.

**I:** Than you are?

**M:** Yes, and that way I feel confident that what I have is very, very nice because he picked it out and I would be doubtful if I picked it out. I have confidence in him, (the antique dealer) knows everything about antiques, I think. If he tells me something, why I know it's true—no matter what I think. I know he is the one that's right.

This excerpt is most revealing of the way in which Marsha could increase her feeling of confidence by relying on the judgment of another person, particularly a person she trusted. Marsha tells us quite plainly that she would be doubtful (i.e., uncertain) about her own judgment, but she “knows” (i.e., is certain) that the antique dealer is a good judge, “no matter what I think.” The dealer once sent a chair that, on first inspection, did not appeal to Marsha. She decided, however, that she must be wrong, and the dealer right, and grew to like the chair very much.

# Conversations

- Conversations
  - An informal qualitative data-gathering approach in which the researcher engages a respondent in a discussion of the relevant subject matter.
- Semi-structured Interviews
  - Written form and ask respondents for short essay responses to specific open-ended questions.
  - Advantages
    - An ability to address more specific issues.
    - Responses are easier to interpret.
    - Without the presence of an interviewer, semi-structured interviews can be relatively cost effective.

# Free-Association/Sentence Completion Method

- Free-Association Techniques
  - Record respondents' first (top-of-mind) cognitive reactions to some stimulus.
  - Allow researchers to map a respondent's thoughts or memory.
- Sentence Completion
  - *People who drink beer are* \_\_\_\_\_
  - *A man who drinks light beer is* \_\_\_\_\_
  - *Imported beer is most liked by* \_\_\_\_\_
  - *A woman will drink beer when* \_\_\_\_\_

# Other Qualitative Techniques

- Observation
  - Field notes
    - The researcher's descriptions of what actually happens in the field; these notes then become the text from which meaning is extracted.
  - Observational research is advantageous for gaining insight into things that respondents cannot or will not verbalize.
- Collages
  - Respondents prepare a collage to represent their experience with some good, service, or brand.
  - Collages are then analyzed for meaning.

# Other Qualitative Techniques (cont'd)

- Thematic Apperception Test (TAT)
  - Presents subjects with an ambiguous picture(s) in which consumers and products are the center of attention; the investigator asks the subject to tell what is happening in the picture(s) now and what might happen next.
- Picture Frustration
  - A version of the TAT using a cartoon drawing in which the respondent suggests a dialogue in which the characters might engage.

EXHIBIT 6.6 Picture Frustration Version of TAT

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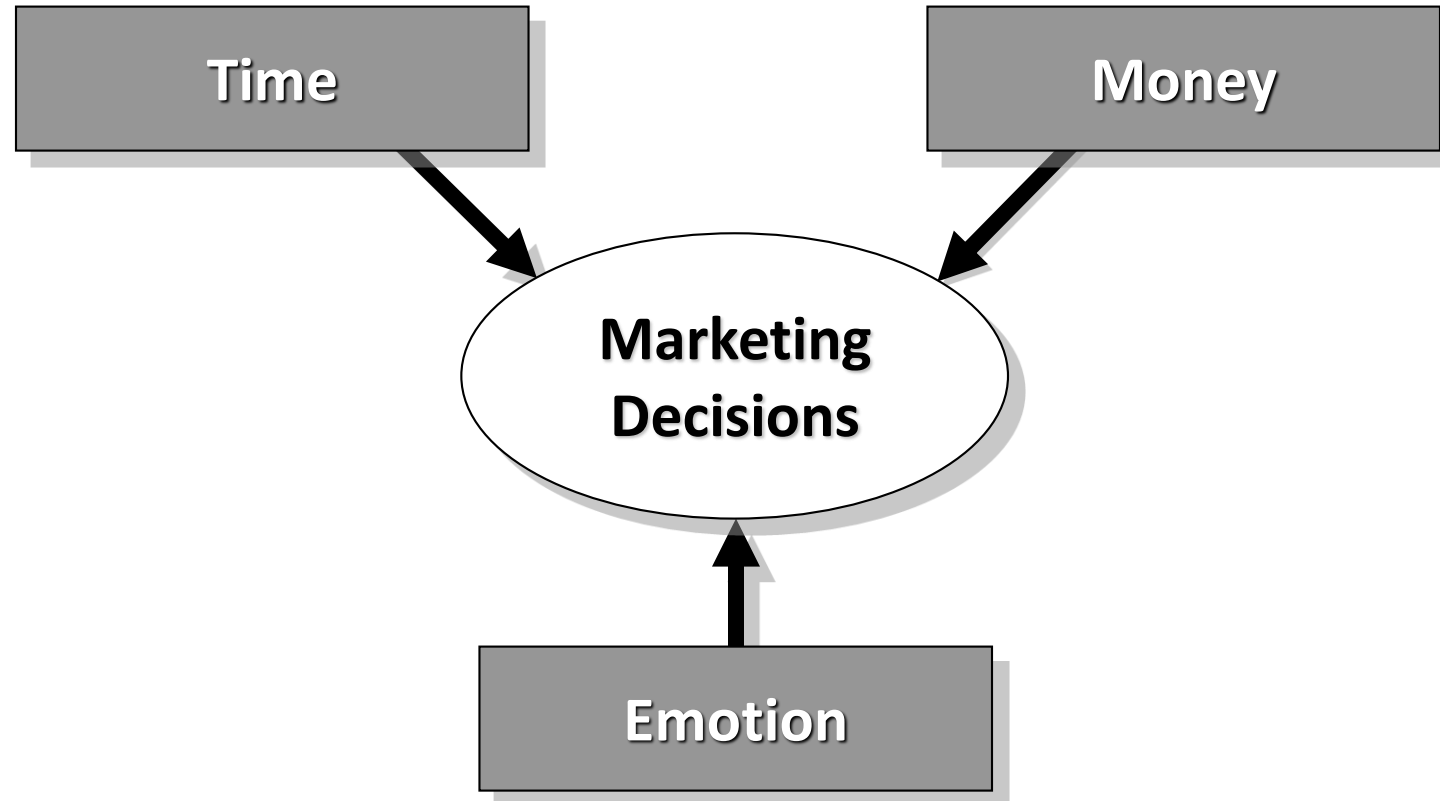
# Projective Research Techniques

- Projective Technique
  - An indirect means of questioning enabling respondents to project beliefs and feelings onto a third party, an inanimate object, or a task situation.
  - Projective techniques are particularly useful in studying sensitive issues.

# Exploratory Research in Science and in Practice

- Misuses of Exploratory and Qualitative Research
  - Subjectivity
    - Qualitative research cannot draw conclusive references
  - Replicability
    - When the same conclusion is reached based on another researcher's interpretation.

# Why Marketing Decisions Are Based Exploratory Research



# Key Terms and Concepts

- Qualitative Marketing Research
- Researcher-dependent
- Quantitative Marketing Research
- Subjective
- Qualitative Data
- Quantitative Data
- Concept Testing
- Phenomenology
- Hermeneutics
- Hermeneutic Unit
- Ethnography
- Participant-observation
- Grounded Theory
- Case Studies
- Themes
- Focus Group Interview
- Piggyback
- Moderator
- Discussion guide
- Streaming media
- Online focus group
- Focus blog
- Depth interview
- Laddering

# Key Terms and Concepts (cont'd)

- Conversations
- Free-association techniques
- Field notes
- Thematic apperception test (TAT)
- Picture frustration
- Projective technique
- Replicable

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**Thank you**