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Essentials of
MARKETING RESEARCH

Chapter 4

Exploratory and Observational Research
Designs and Data Collection
Approaches

Learning Objectives

- Identify the major differences between qualitative and quantitative research.
- Understand in-depth interviewing and focus groups as questioning techniques.
- Define focus groups and explain how to conduct them.

4-2

Learning Objectives

- Explain other qualitative data collection methods such as ethnography, case studies, netnography, projective techniques, and the ZMET.
- Discuss observation methods and explain how they are used to collect primary data.

4-3

Value of Qualitative Research

- Qualitative research is used in exploratory research designs when the research objectives are to:
  – Gather background information
  – Clarify the research problems
  – Create hypotheses or establish research priorities
- Results may be sufficient for decision making in certain situations

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Overview of Research Designs

- Three major types of research designs:
  – Exploratory
  – Descriptive
  – Causal
- Each type of design has a different objective
  – Depending on the research objective, marketing researchers use all three types of research designs

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Overview of Qualitative and Quantitative Research Methods

- **Quantitative research**: Places heavy emphasis on using formal standard questions and predetermined response options in questionnaires or surveys administered to large numbers of responders
- **Qualitative research**: Collection of data in the form of text or images using open-ended questions, observation, or "found" data

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Exhibit 4.1- Major Differences between Qualitative and Quantitative Research Methods

Factor	Qualitative Methods	Quantitative Methods
Goals/Objectives	Discovery/identification of new ideas, thoughts, feelings; preliminary understanding of relationships; understanding of hidden psychological and social processes	Validation of facts, estimates, relationships
Type of Research Type of Questions Time of Execution	Exploratory Open-ended, unstructured, probing Relatively short time frame	Descriptive and causal Mostly structured Typically significantly longer time frame
Representativeness	Small samples, only the sampled individuals	Large samples, with proper sampling can represent population
Type of Analysis	Debriefing, subjective, content analysis, interpretative	Statistical, descriptive, causal predictions
Researcher Skills	Interpersonal communications, observation, interpretation of text or visual data	Statistical analysis, interpretation of numbers
Generalizability	Limited	Generally very good, can infer facts and relationships

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Exhibit 4.2 - Advantages and Disadvantages of Qualitative Research

Advantages of Qualitative Research	Disadvantages of Qualitative Research
Except for ethnography, data can be collected relatively quickly or may already exist as naturally occurring conversations on the Internet	Lack of generalizability
Richness of the data	Difficulty in estimating the magnitude of phenomena being investigated
Accuracy of recording marketplace behaviors (validity)	Low reliability
Preliminary insights into building models and scale measurements	Difficulty finding well-trained investigators, interviewers, and observers
Insights from qualitative researchers with training in social and behavioral sciences	Reliance on subjective interpretive skills of qualitative researcher

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In-Depth Interviews

- A data-collection method in which a well-trained interviewer asks a participant a set of semi-structured questions in a face-to-face setting

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Steps in Conducting an In-Depth Interview

- Understand initial questions/problems
- Create a set of research questions
- Decide on the best environment for conducting the interview
- Select and screen the respondents
- Respondent greeted, given interviewing guidelines, and put at ease
- Conduct the in-depth interview
- Analyze respondent's narrative responses
- Write summary report of results

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Focus Group Interviews

- A qualitative data collection method
- Responses to open-ended questions are collected from a small groups of participants who interactively and spontaneously discuss topics of interest to the researcher
  - **Bulletin board**: An online research format in which participants agree to post regularly over a period of four to five days

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Exhibit 4.5 - Three-Phase Process for Developing a Focus Group Interview

Phase 1: Planning the Focus Group Study
- Researcher must understand the purpose of the study, the problem definition, and specific data requirements.
- Key decisions are who the appropriate participants will be, how to select and recruit participants, how many focus groups will be conducted, and where to have the sessions.

Phase 2: Conducting the Focus Group Discussions
- Moderator's guide is developed that outlines the topics and questions to be used.
- Questions are asked, including follow-up probing.
- Moderator ensures all participants contribute.

Phase 3: Analyzing and Reporting the Results
- Researcher debriefs all the key players involved to compare notes.
- Data obtained from the participants is analyzed using content analysis.
- A formal report is prepared and presented.

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Focus Group Interviews - Selection and Recruitment of Participants

Purposive Sampling
- Selecting sample members to study because they possess attributes important to understanding the research topic

Stratified Purposive Sampling
- Selecting sample members so that groups can be compared

Theoretical Sampling
- Selecting sample members based on earlier interviews that suggest that particular types of participants will help researchers better understand the research topic

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Focus Group Interviews

- **Focus group moderator**: A person who is well trained in the interpersonal communication skills and professional manners required for a focus group
- **Moderator's guide**: A detailed outline of the topics, questions, and subquestions used by the moderator to lead the focus group session

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Focus Group Interviews

- **Debriefing analysis**: An interactive procedure in which the researcher and moderator discuss the subjects' responses to the topics that outlined the focus group session
- **Content analysis**: The systematic procedure of taking individual responses and grouping them into larger theme categories or patterns

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Advantages of Focus Groups

- Stimulate new ideas, thoughts, ad feelings about a topic
- Foster understanding of consumer behavior
- Allow client participation
- Elicit wide range of responses
- Bring together hard-to-reach informants

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Weaknesses of Focus Groups

- Findings lack generalizability to the target population
- Reliability of the data is limited
- Trustworthiness of the interpretation is based on care and insightfulness of researchers
- **Groupthink**: A phenomenon in which one or two members of a group state an opinion and other members of the group are unduly influenced

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Ethnography

- A form of qualitative data collection that records behavior in natural settings to understand how social and cultural influences affect individual behaviors and experiences
  - **Participant observation**: An ethnographic research technique that involves extended observation of behavior in natural settings in order to fully experience cultural or subcultural contexts
  - Nonparticipant observation - Researcher observes without entering into events

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Case Study

- An exploratory research technique that intensively investigates one or several existing situations that are similar to the current problem/opportunity situation
  - Case study research tracks thinking by the same individual, group, or organization
    - Uses multiple interviews over several weeks
    - Can obtain subconscious thinking and study group interaction over time

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Projective Techniques

- An indirect method of questioning that enables a subject to project beliefs and feelings:
  - Onto a third party
  - Into a task situation
  - Onto an inanimate object
- Can be used in conjunction with focus groups or in-depth interviews

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Projective Techniques

- Major disadvantage - Complexity of interpretation
- **Word association test**: A projective technique in which the subject is presented with a list of words or short phrases, one at a time, and asked to respond with the first thought [word] that comes to mind
- **Sentence completion test**: A projective technique where subjects are given a set of incomplete sentences and asked to complete them in their own words

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Projective Techniques

- **Zaltman Metaphor Elicitation Technique (ZMET)**: A visual research technique used in in-depth interviewing that encourages research participants to share emotional and subconscious reactions to a particular topic

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Observation Methods

- Used by researchers to collect primary data about human behavior and marketing phenomena regardless of the nature of research designs
- **Observation research**: Systematic observation and recording of behavioral patterns of objects, people, events, and other phenomena
  - Requires two elements
    - A behavior or event that is observable
    - A system of recording it

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Exhibit 4.6 - Unique Characteristics of Observation

Characteristic	Description
Directness	The degree to which the researcher or trained observer actually observes the behavior or event as it occurs. Observation can be either direct or indirect.
Awareness	The degree to which individuals consciously know their behavior is being observed and recorded. Observation can be either disguised or undisguised.
Structure	The degree to which the behavior, activities, or events to be observed are known to the researcher before doing the observations. Observation can be either structured or unstructured.
Observing Mechanism	How the behavior, activities, or events are observed and recorded. Alternatives include trained human observers and technological devices.

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Types of Observation Methods

- Refers to how behaviors or events will be observed
  - **Technology-mediated observation**: Data collection using some type of mechanical device to capture human behavior, events, or marketing phenomena
  - **Scanner-based panel**: A group of participating households that have a unique bar-coded card as an identification characteristic for inclusion in the research study

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Selecting the Observation Method

- First researchers must answer the following questions:
  - What types of behavior are relevant to the research problem?
  - How much detail of the behavior needs to be recorded?
  - What is the most appropriate setting (natural or artificial) to observe the behavior?

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Selecting the Observation Method

- Next, various methods of observing behaviors must be evaluated
- Issues to be considered include:
  - Is a setting available to observe the behaviors or events?
  - To what extent are the behaviors or events repetitious and frequently exhibited?

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Selecting the Observation Method

– What degree of directness and structure is needed to observe the behaviors or events?

– How aware should the subjects be that their behaviors are being observed?

– Which observation method is most appropriate: in-person or technology-mediated?

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Exhibit 4.7 - Benefits and Limitations of Observation

Benefits of Observation	Limitations of Observation
Accuracy of recording actual behavior	Difficult to generalize findings
Reduces many types of data collection	Cannot explain behaviors or events unless combined with another method
Provides detailed behavioral data	Problems in setting up and recording behavior(s) or events

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Social Media Monitoring and the Listening Platform

• **Social media monitoring**: Research based on conversations in social media

• **Listening platform/post**: An integrated system that monitors and analyzes social media sources to provide insights that will support marketing decision making

• **Sentiment analysis/opinion mining**: The application of technological tools to identify, extract, and quantify subject information in textual data

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Netnography

- A research technique that requires deep engagement with online communities
- Researchers must:
  - Gain entrée into the community
  - Gather and analyze data from members of the community
  - Ensure trustworthy interpretation of the data
  - Provide opportunities for feedback on the research report from members of the community

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The end!

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