

# MARK2052 MR2 Qualitative Research

(T3-2019)



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## Lecture structure for this lecture

- Course issues and questions
- Last topic: MR1: course overview and marketing research process
- Interview
- Focus group
- Observation
- Lecture summary
- Next topic: MR3: quantitative research



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## What is qualitative research?

- Research methodology that addresses research objectives through techniques that allow the researcher to provide elaborate interpretations of phenomena of interest **without depending on numerical measurement.**
  - Focus is on **in-depth understanding and insight**, rather than on more generalisable findings associated with quantitative research.
  - Relies more on the skill of the researcher to extract meaning that is actionable from **unstructured responses** such as text, a recorded interview, stories from consumers, web logs, video recordings and transcripts.



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## Uses of qualitative research

- Useful when a researcher has limited amount of experience or knowledge about a research issue.
- Conducted for three purposes:
  - diagnosing a situation
  - screening alternatives
  - discovering new ideas



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## Uses of qualitative research (continued)

- Diagnosing a situation
  - Used to diagnose the dimensions of problems.
  - Helps set priorities for research.
  - Gathering information on unfamiliar topic.



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## Uses of qualitative research (continued)

- Screening alternatives
  - Used to determine the best alternatives under budget constraints.
  - Concept testing: Any exploratory research procedure that tests some sort of stimulus as a proxy for a new, revised or repositioned product, service or strategy.
    - Example, how to market organ donation cause.



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## Uses of qualitative research (continued)

- Discovering new ideas
  - To generate ideas for new products, advertising copy etc.
  - Uncovering consumer needs, such as determining what problems consumers have with a product category
    - For example, quality dog food smells bad in the refrigerator.



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## Qualitative vs. quantitative research

**EXHIBIT 3.1 → COMPARING QUALITATIVE AND QUANTITATIVE RESEARCH**

Qualitative research	Research aspect	Quantitative research
Discover ideas; used in exploratory research with general research objects	Common purpose	Test hypotheses or specific research questions
Observe and interpret	Approach	Measure and test
Unstructured, free-form	Data collection approach	Structured response categories provided
Researcher is intimately involved; results are subjective	Researcher independence	Researcher uninvolved observer; results are objective
Small samples – often in natural settings	Samples	Large samples to produce generalisable results (results that apply to other situations)
Exploratory research designs	Most often used	Descriptive and causal research designs

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## Qualitative research methods

- Interview
- Focus group
- Observation



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## Common qualitative research methods/techniques

	Description	Key advantages	Key disadvantages
Focus group interviews	Small group discussions led by a trained moderator	<ul style="list-style-type: none"> <li>» Can be done quickly</li> <li>» Gain multiple perspectives</li> <li>» Flexibility</li> <li>» Inexpensive</li> </ul>	<ul style="list-style-type: none"> <li>» Results do not generalise to larger population</li> <li>» Difficult to use for sensitive topics</li> </ul>
Depth interviews	One-on-one, probing interview between a trained researcher and a respondent	<ul style="list-style-type: none"> <li>» Gain considerable insight from each individual</li> <li>» Good for understanding unusual behaviours</li> </ul>	<ul style="list-style-type: none"> <li>» Results do not generalise</li> <li>» Very expensive per each interview</li> </ul>
Conversations	Unstructured dialogue recorded by a researcher	<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>

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## Common qualitative research methods (continued)

	Description	Key advantages	Key disadvantages
Semi-structured interviews	Open-ended questions, often in writing, that ask for short essay-type answers from respondents	<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	<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	<ul style="list-style-type: none"> <li>» Can be unobtrusive</li> <li>» Can yield actual behaviour 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	<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</li> </ul>
Thematic apperception/ Cartoon tests	Researcher provides an ambiguous picture and respondent tells about the story	<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>

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## What is interview?

- Researcher asks many questions and **probes for additional elaboration** after respondent answers.
- Requires highly skilled interviewer to encourage respondents to speak freely without being influenced.

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## Interview (continued)

- Probing questions:
  - ‘Can you give me an example of that?’
  - ‘Why do you say that?’



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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 to 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) judgement?

**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 judgement of another person, particularly a person she trusted. Marsha tells us quite plainly that she would be doubtful (i.e., uncertain) about her own judgement, 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.

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## Types of interview

- Personal interviews
- Door-to-door personal interviews
- Personal interviews conducted in shopping malls
- Telephone interviews



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## Personal interviews

- Form of direct communication in which an interviewer asks respondents questions face to face.

### Advantages

- Opportunity for feedback
- Probing complex answers
- Length of interview controlled
- Completeness of questionnaire
- Props and visual aids
- High participation

### Disadvantages

- Interviewer characteristics and techniques may influence respondents' answers.
- Lack of anonymity of respondent
- Cost

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## Door-to-door personal interviews

- Door-to-door interviews are conducted at respondents' doorsteps.
  - An effort to increase the participation rate.
- Call-backs are attempts to recontact individuals selected for a sample who were not available initially.



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## Shopping mall intercepts

- Mall intercept interviews are conducted in a shopping mall.
  - Lower costs but higher refusal rates.



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## Telephone interviews

- Personal interview conducted by telephone

Advantages	Disadvantage
<ul style="list-style-type: none"> <li>• Speedy data collection</li> <li>• Relatively inexpensive</li> <li>• Call back option</li> <li>• Representative samples</li> <li>• People maybe willing to cooperate with a telephone survey instead of face to face</li> </ul>	<ul style="list-style-type: none"> <li>• Absence of face-to-face contact is more impersonal.</li> <li>• Respondents can hang up and end the interview</li> <li>• Lack of visual medium</li> </ul>

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## What is focus group?

- An unstructured, free-flowing **interview with a small group of people.**
- The group meets at a central location with a **moderator** who encourages discussion of a brand, advertisement or new product concept.
- Allows people to discuss their true feelings, anxieties and frustrations in their own words.

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## Focus group (continued)

- Group composition
  - Range between 6 to 10 people.
  - Relatively **homogeneous** (similar lifestyles, experiences and communication skills).
  - Several focus groups can be utilised to collect different types of information.



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## Focus group (continued)

- Environmental conditions
  - Usage of commercial facilities that have videotape cameras and microphone systems in observation rooms behind one-way mirrors to allow observation by others who are not in the room.
  - **Relaxing atmosphere.**



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## Focus group (continued)

- The moderator
  - Develops rapport – helps people relax.
  - Promotes interaction among group members and gives everyone a chance to speak.
  - Listens to what people have to say.
  - Directs discussion on areas of concern.
  - Manages the discussion flow.
  - Begins with general discussion before focusing on specific topics.



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## Focus group (continued)

- Planning the focus group outline
  - **Discussion guide:** A document prepared by the focus group moderator that contains remarks about the nature of the group and outlines the topics or questions to be addressed.



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<p><b>1 INTRODUCTION</b></p> <ul style="list-style-type: none"> <li>a Introduce moderator and thanks for coming.</li> <li>b Mobiles OFF.</li> <li>c Directions to the toilets and safety.</li> <li>d Permission to record audio and video audio.</li> <li>e Only one person to speak at once to ensure audio recording clear.</li> <li>f Advise that the group is also being viewed live.</li> <li>g Interested in all the opinions, experiences and perceptions on both current and previous mobile provider (be it positives or negatives).</li> <li>h No right or wrong answers – everybody has a different opinion and circumstances.</li> <li>i Self-introduction of group participants.</li> </ul> <p>We would like to discuss your experiences with both your current and previous mobile service provider and the things that pushed you away from your previous mobile service provider.</p> <p>Moderator to probe for full understanding of words/descriptions used, for example: 'What do you mean by "rude" staff?' 'What do you mean by "difficult to communicate with them"?'</p> <p><b>2 DESCRIBES THE CONTEXT</b></p> <ul style="list-style-type: none"> <li>a How long have you been with your mobile service provider?</li> <li>b Describe the details of the plan you were previously on before you switched.</li> <li>c Prompt if necessary: Who with? How much?, What does it include (data, SMS etc.)?</li> </ul>	<ul style="list-style-type: none"> <li>d What's different about your current plan compared to the old one?</li> <li>e Do you use more than one mobile provider? If so, why?</li> <li>f Do you know the difference between a network carrier (e.g., Telstra, Optus) and a service provider (e.g., Boost, Crazy John's)? Does it matter?</li> <li>g How often you monitor your bill? If so, how do you monitor?</li> </ul> <p><b>3 DESCRIBES THE PUSH FACTORS AWAY FROM YOUR PREVIOUS MOBILE PHONE SERVICE PROVIDER</b></p> <ul style="list-style-type: none"> <li>a Describe your experience with your previous mobile service provider.</li> <li>b Was there anything that really 'disappointed' or 'frustrated', or made you unhappy about your previous mobile service provider. (e.g. too hard to compare plans, they're all the same, I want to keep my mobile number, I've been with my current provider for so long I can't be bothered changing)?</li> <li>c Were there any incidents that occurred that led you to say, 'That's enough. I have to change'?</li> <li>d Probe: What were the biggest areas of service failure (examples include billing errors, technical problems, unexpected costs, lack of customer service)?</li> <li>e Did you incur any unexpected costs (or savings; i.e., you underspent) with your</li> </ul>	<p>← EXHIBIT 3.5 EXCERPT OF A DISCUSSION GUIDE FOR A MOBILE PHONE SWITCHING STUDY<sup>25</sup></p>
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<p>previous mobile phone service provider? What happened? How did you feel? Did you find it easy or difficult to understand all of the costs involved in using your previous mobile service provider? Was your previous service provider open in telling you all the costs involved?</p> <ul style="list-style-type: none"> <li>f Have you incurred any unexpected costs (or savings) with your current mobile service provider? What happened? How did you feel? What did you do about it?</li> </ul> <p><b>4 DESCRIBES THE PULL FACTORS TOWARDS YOUR CURRENT NEW MOBILE PHONE SERVICE PROVIDER</b></p> <ul style="list-style-type: none"> <li>a Now that you have switched what attracted you to move to this new mobile phone service provider?</li> <li>b Describe your experience and the steps you took in searching for a new mobile phone service provider.</li> <li>c How difficult was it for you to compare the different service provider offers? Was the information easy to find and understand? [Prompt if necessary.]</li> <li>d Is there anything which caused confusion?</li> </ul>	<ul style="list-style-type: none"> <li>e Describe your experiences switching into the new provider. [Probe if necessary.]</li> </ul> <p><b>5</b></p> <ul style="list-style-type: none"> <li>a Where did you buy your mobile service from? In person? Over the phone? Or on the Internet? Why did you choose this source?</li> <li>b Were there any hassles along the way? Did you read the contract? Any issues with it?</li> <li>c How difficult to understand was the pre-sales marketing and product information provided to you by your new provider?</li> <li>d Did the mobile phone provider follow through on its customer service promises? How did the mobile phone provider handle these issues?</li> <li>e Having now switched over, describe your experience with the mobile phone service provider since you switched. Were your expectations met? Did the new provider tell you all the relevant details about your new plan?</li> <li>f Have you saved money or experienced other benefits since switching mobile service providers? If so, what benefits have you experienced?</li> <li>g Did you have any post-sale complaints? Can you tell me about those? How were they handled?</li> </ul>
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## Advantages of a focus group

- Fast, inexpensive and easy to execute.
- Discussion of numerous topics and many insights can be gained.
- Synergy: **group insights and ideas**.
- Snowballing: a comment triggers a chain of responses.
- Serendipity: group idea generation.
- Security: participants share similar feelings.
- Spontaneity: responses can be more spontaneous.
- Structure: moderator controls the interviews.
- Scientific scrutiny through observers and recordings.



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## Disadvantages of a focus group

- Focus groups require **sensitive and effective moderators**.
  - Without a good moderator, self-appointed participants may dominate a session, giving somewhat misleading results.
- Since focus group participants are screened to have similar backgrounds and experiences, they may not be representative of the entire market.
  - Sampling issues.



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## What is observation?

- Observation is the **systematic process of recording** the **behavioural patterns** of people, objects and occurrences as they are witnessed.
  - No questioning or communicating with people.
  - The researcher witnesses and records information as events occur, or compiles evidence from records of past events.



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## Use of observational research in Australia

- When developing food products, companies such as Sanitarium, Campbell Arnott's and Heinz often use at-home research.
  - Sanitarium brand managers may arrange to visit half-a-dozen homes at 7am to observe consumers' breakfast routines.
  - Heinz used at-home research for its steam-fresh vegetable bags. A Heinz spokeswoman says: 'It was important to see how people used the product in their home situation when it wasn't precisely prepared in a [company] kitchen and observe the sensory aspect of how they found the product'.



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## When is observation scientific?

- Observation becomes a tool for scientific inquiry when it:
  - serves a formulated research purpose.
  - is planned systematically.
  - is recorded systematically and related to general propositions rather than simply reflecting a set of interesting curiosities.
  - is subjected to checks or controls on validity and reliability.



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## What can be observed?

- A wide variety about the **behaviour** of people and objects.
- Used to describe a wide variety of behaviour.
- The observation period is also generally of **short duration**.



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## What can be observed? (continued)

**TABLE 6.1 »** WHAT CAN BE OBSERVED

Phenomenon	Example
Physical action	A shopper's movement pattern in a store
Verbal behaviour	Statements made to call centre staff about bank service
Expressive behaviour	Facial expressions, tone of voice and other forms of body language
Spatial relations and locations	How close visitors at an art museum stand to paintings
Temporal patterns	How long fast-food customers wait for their orders to be served
Physical objects	What brand-name items are stored in consumers' pantries
Verbal and pictorial records	Bar codes on product packages

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## What cannot be observed?

- Cognitive phenomena such as **underlying attitudes, motivations and preferences** cannot be observed.
- Cannot provide explanations as to why the observed behaviour occurred and its intention behind it.
- Behaviour patterns that **span over several days**.

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## The nature of observation studies

- Marketing researchers can observe people, objects, events or other phenomena using either human observers or machines designed for specific observation tasks.
  - **Human observation** best suits a situation or behaviour that is not easily predictable in advance of the research.
  - **Mechanical observation**, as performed by supermarket scanners or traffic counters, can very accurately record situations or types of behaviour that are routine, repetitive or programmatic.



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## The nature of observation studies (continued)

- Human or mechanical observation may be unobtrusive; that is, it may not require communication with respondents.
- Visible observation versus hidden observation.



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## Observation of human behaviour

- Observation of nonverbal behaviour
- For example, toy manufacturers such as Fisher Price use observation because children cannot express their reactions to products, but their behaviour can.
  - How long does the child's attention stay with the product?
  - How long until the child puts the toy down?
  - Are the child's peers equally interested in the toy?



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## Observation of human behaviour (continued)

**TABLE 6.2 » NONVERBAL COMMUNICATION: STATUS AND POWER GESTURES<sup>5</sup>**

Behaviour	Between people of equal status		Between people of unequal status		Between men and women	
	Intimate	Nonintimate	Used by superior	Used by subordinate	Used by men	Used by women
Posture	Relaxed	Tense (less relaxed)	Relaxed	Tense	Relaxed	Tense
Personal space	Closeness	Distance	Closeness (optional)	Distance	Closeness	Distance
Touching	Touch	Don't touch	Touch (optional)	Don't touch	Touch	Don't touch
Eye gaze	Establish	Avoid	Stare, ignore	Avert eyes, watch	Stare, ignore	Avert eyes
Demeanour	Informal	Circumspect	Informal	Circumspect	Informal	Circumspect
Emotional expression	Show	Hide	Hide	Show	Hide	Show
Facial expression	Smile	Don't smile	Don't smile	Smile	Don't smile	Smile

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## Direct observation

- A straightforward attempt to observe and record what naturally occurs.
- Investigator plays a passive role and does not create an artificial situation.
- An observation form keeps observations consistent.
- The amount of time it takes to make a choice between two alternatives, or response latency, can be observed.



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## Errors associated with direct observation

- Not error-free because the observer may record events subjectively.
- **Observer bias:** A distortion of measurement resulting from the cognitive behaviour or actions of the witnessing observer.
- Accuracy may suffer if the observer does not record every detail.
- Interpretation of observation data is another major source of error.



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## Scientifically contrived observation

- **Contrived observation:** Investigator intervenes to create an artificial environment in order to test a hypothesis.
- Contrived situations reduce the research time spent waiting and observing a situation.
- For example, mystery shoppers to come into a store and pretend to be interested in a particular product or service; after leaving the store, the 'shopper' evaluates the salesperson's performance.



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## Ethical issues in observation of humans

- Hidden observations raises issues of the respondent's right to privacy.
- Contrived observation raises issues of **deception**.
- Researchers need to balance their values and approaches.
- If a researcher obtains permission to observe, the subject may not act in a typical manner.
- However, not getting permission may be unethical.



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## Observation of physical objects

- Physical-trace evidence is a visible mark of some past event or occurrence
  - wear on library books to determine books most read.
  - erosion traces on museum floor tiles to determine most popular exhibits.
  - counting and recording physical inventories by means of retail or wholesale audits allows researchers to investigate brand sales on regional and national levels, market shares, seasonal purchasing patterns and so on.



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## Content analysis

- Content analysis is the systematic observation and quantitative description of the manifest content of communication.
- Content or messages of advertisements, newspaper articles, television programs etc.
  - E.g. frequency of appearance of women or minorities in mass media
  - Whether advertisers use certain themes or appeals more than others.



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## Mechanical observation

- Television monitoring: OzTAM estimates national television audiences.
  - electronic boxes hooked up to television sets to capture program choices, length of viewing time and identity of viewer.
- Monitoring website traffic
  - e.g. Nielsen has its web monitoring software installed in 225 000 computers in homes and workplaces in 26 countries.



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## Mechanical observation (continued)

- Scanner-based research
  - optical character recognition and bar code scanners can show a marketer week by week how a product is doing, even in a single shop, and track sales in response to local ads or promotions.
  - At-home scanning systems enable consumer panels to perform self-scans at home after product purchase.



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## Mechanical observation (continued)

- Web monitoring example

**TABLE 6.3 » SELECTED WEB ADVISERS' OBJECTIVES AND THE METRICS THAT ADDRESS THESE OBJECTIVES<sup>16</sup>**

Objectives and metrics	What does it measure?	How is it used?	What is it used for?
Visits	Number of user sessions	Measure of site exposure	Evaluation of message exposure
Average time per unique visitor	Usefulness of site (time spent on site)	Measure of usefulness and comparison over time of sites	Evaluation of usefulness and interest
Stickiness	Composite of the number of users, frequency, recency and average time per visit/visitor	Composite measure of stickiness	Evaluation of advertising appeals
Clicks	Number of clicks from originating buttons/links	Measure of communality with other sites (shared users)	To evaluate co-marketing pattern partners; improve co-marketing programs
Path analysis	Paths taken through site by visitors	Indicates most popular paths to site	To review and change content or site navigation
Global geographic	Visitor's country	Assess exposure by country	To evaluate and improve targeting of messages by country
Observed profiling	Visitor's previous site behaviour	Understanding what visitors do on the site	To improve targeting of messages by studying each visitor's behavioural patterns

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## Measuring physiological reactions

- **Eye-tracking monitors** observe eye movements.
- **Pupilometers** are used to observe and record changes in the diameter of a subject's pupils.
- **Psychogalvanometer** measures galvanic skin response.

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## Measuring physiological reactions (continued)

- **Voice pitch analysis** records abnormal frequencies in the voice that reflect emotional reactions.
- **Functional magnetic resonance imaging (MRI)**
  - Reveals which parts of the brain are active in real time



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## Advances in qualitative research

- Videoconferencing and streaming media
  - Focus group companies now use the ability to communicate via telecommunications and videoconferencing links.
  - Marketing managers can watch the group at home.
  - Streaming media is used to broadcast focus groups to be viewed online.



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## Advances in qualitative research (continued)

- Interactive media and online focus groups
  - Online focus group: Members use internet technology to provide unstructured comments by entering their remarks into a computer.
  - Private chat rooms
  - Online moderator
  - Drawbacks
    - Less interaction = less synergy and snowballing
    - Moderator cannot see body language and facial expressions.



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## Advances in qualitative research (continued)

- Social networking
  - Social networking sites (e.g. Facebook, LinkedIn, Twitter) can provide a wealth of qualitative data.
  - Data are more realistic and less biased than direct questioning.
  - Ethical issues about privacy and consent.
  - Example, Mars conducting research to find 'creative and cool' young consumers for idea and concept discussion through social networking sites.



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## Advances in qualitative research (continued)

- Software tools
  - Nvivo, Atlas and Leximancer are popular computerised qualitative analysis software for theme identification and connecting text.
- Textmining
  - Modern predictive analysis software allows text data to be mined from various sources including social networking sites, recorded conversations from call centres, email contacts and many more sources.



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## A warning about qualitative research

- Cannot take the place of conclusive, quantitative research.
- Can lead to incorrect decisions.
- Interpretation of findings typically judgemental.
- Most techniques use small samples that may not be representative.



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## Next Topic: MR3 – Quantitative Research

- Designing and conducting quantitative research
  - Survey
  - Experiment

