Qualitative Research in Business

Qualitative Research in Business:

A Practical Overview

By

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In recent decades there has been a movement within business disciplines such as macromarketing, business anthropology, and consumer research to embrace a wider array of qualitative research methods. Those who have widened this path have contributed the richer and more robust array of techniques that are available today. This book is inspired by and a tribute to these innovative and visionary investigators.

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FOREWORD

In recent decades, the reputation of qualitative research within business has grown. This development is reflected by trends that include the rise of the naturalistic movement in consumer research and the emergence of business anthropology as an influential and growing subfield.

As a result of these developments, members of the business community (both in the academic and practitioner sectors) increasingly seek a better understanding of qualitative methods, what these tools do and cannot do, as well as how to fruitfully use them when gathering evidence, interpreting findings, and making strategic/tactical decisions. The purpose of this short book is to provide a relevant background in a reader-friendly a manner that requires a minimum previous background.

The road towards respectability for qualitative research has been slow and difficult. Historically, as discussed in Chapter 1, most business researchers gravitated towards modes of research that were inspired by scientific and quantitative methods. The field of psychology (which during the post-World War II era was largely under the influence of behaviorism and the empirical methods it championed) exerted much influence in this regard.

Most business researchers acted accordingly. Drawing conclusions by manipulating observable evidence and evaluating it using quantitative and statistical analysis was the norm. Doing so is the antithesis of the typical qualitative investigation, which views people in their natural setting and focuses upon their thoughts, feelings, opinions, and so forth.

During the reign of quantitative/scientific methods, qualitative techniques were occasionally tolerated when cost and/or speed were priorities, but these research methods were not considered to be desirable, prestigious, or rigorous. Scientific and quantitative techniques, in contrast, were recognized as state of the art, and business researchers typically embraced these methods whenever they could. That situation prevailed for many years.

Over time, however, the stranglehold of the positivistic, scientific, and quantitative methods began to relax. In psychology, this tendency is associated with what is commonly known as the "cognitive revolution." Cognitive studies, of course, deal with subjective thought, not merely actions and behaviors. When studying the idiosyncratic thought of informants (instead of or in addition to observable action), qualitative

investigators transcended a reliance upon empirical evidence and began to consider motives, goals, feelings, and so forth, which cannot be directly observed.

Thus, although "behavior" can be directly observed, thinking and feelings cannot not be seen. Studying cognitive thought, therefore, required a movement away from strict scientific methods and their empirical foundation. As time went on, fields such as linguistics and anthropology came to envision two separate paths for conducting research: the "etic method" (which centers on rigorous issues of concern to the researcher), and the "emic method (which focuses upon the subjective thoughts of the informant being studied). These two approaches to social research are discussed in Chapter 5.

Because emic methods focus upon subjective thought, the growing legitimacy of this system of analysis helped qualitative investigators to establish a beachhead within business research. The power and prestige of the emic tradition within business research continues to grow.

Nevertheless, the vogue of qualitative procedures in business research is still fairly new. This book was written to introduce relevant elements of qualitative research to those who seek a quick and practical introduction. These discussions can be used in a private and independent manner or as a text for formal instruction. In general, three basic tasks are accomplished. The first two chapters provide a general grounding. This is followed by three chapters that introduce a variety of qualitative methods of value to business research. The last two segments deal with (a) issues of rigor and intellectual respectability and (b) strategies for presenting findings. Seeking to provide a short and readable discussion, I have made no attempt to be exhaustive; nonetheless, a useful and approachable treatment is provided. I hope you benefit from it

The introductory chapter begins by chronicling the shift towards scientific research methods in business in the post-World War II era and the eventual reemergence of qualitative methods. Instead of presenting research methods from a good/bad or black/white perspective, a continuum of interrelated approaches is envisioned, each with its own benefits and deficits. After this overview, the chapter concludes with the brief introduction of a number of useful qualitative methods, setting the stage for fuller discussions in later chapters.

Chapter 2 "Qualitative Research Designs" reminds the reader that researchers need to establish specific and self-conscious goals. Doing so helps to focus attention and strategies in ways that lead to appropriate and workable research designs. Researchers typically begin with a literature review that helps clarify the questions to be asked. This gathering and

evaluating of secondary research is followed by deciding what data are needed to achieve the goals of the project(s) and how this information will be gathered. Creating the final product(s) and making decisions regarding how it will be presented are also discussed. On many occasions, the information that is gathered can serve as the foundation for multiple purposes. By using the data as a groundwork for several projects, researchers can become more efficient and productive.

Chapter 3 deals with surveys, focus groups, and interviews. These methods investigate informants who usually know they are being studied and have been prompted to consciously respond. As is widely acknowledged, informants might (consciously or subconsciously) provide inaccurate responses that misrepresent their thoughts and actions. Benefits of these methods, however, include the fact that this type of research can typically be completed quickly and at a reasonable cost. The questions, furthermore, easily deal with issues of interest to the investigator and do so in a systematic and organized manner. These methods are commonly employed by business researchers and used to gather either qualitative/subjective or quantitative/scientific information.

Chapter 4 deals with participant observation, one of the classic methods of qualitative and anthropological research, which has been widely adapted by business researchers. It involves learning by doing, in which the investigator becomes personally involved with the people and the behaviors being studied. The usual goal of participant observation is to understand the point of view held by the informant(s). The process tends to be time consuming, but it often provides an invaluable "insider's view." Sometimes investigators acknowledge that they are engaging in participant observation; on other occasions, the research is conducted covertly. Although covert research has its advantages, it might raise ethical issues that should be considered.

In Chapter 5 "Ethnography and Ethnology," two classic anthropological methods are introduced and discussed in terms of business research. Ethnographies are narrative pictures of some feature of social life. Although often connected with participant observation, the data required to create ethnographies can come from any source. Scholarly anthropologists typically use the ethnographic method to create complex portrayals of how a particular (typically small-scale) society functioned at a particular point in time. In business research, this technique tends to be applied to a small pattern of behavior (such as how a particular product is purchased and/or consumed, how people in a workplace interact, and so forth). Ethnologies, in contrast, attempt to generalize cross-cultural understanding by comparing and juxtaposing multiple examples of

ethnographic analysis. In the current age of global business when an understanding of cultural similarities and differences is increasingly important, the use of ethnological analysis may emerge as an important strategic tool.

Chapter 6 deals with intellectual respectability, which has long been a key issue because a prejudice against qualitative methods is likely to exist. One way to create a level playing field of evaluation is to (1) identify universal variables (such as truth value, applicability, consistency, and neutrality) that all investigators must consider and (2) demonstrate that these issues are dealt with in distinct, but legitimate ways by qualitative researchers. Specific methods for insuring the rigor and respectability of qualitative research include "grounded theory" and "triangulation," which are discussed, as well as a number of additional ad hoc variables. By keeping these issues in mind, qualitative researchers can take proactive steps to ensure that their work will be respected and taken seriously.

The ultimate goal of any research project is producing a useful product that adequately serves the specific target audience that the investigator seeks to influence. Chapter 7 "Presenting Findings" deals with this goal and how to achieve it. The discussion also offers recommendations regarding how to conduct investigations in a manner that can legitimately generate multiple final products from one data-gathering project. By doing so, research efforts can be made more efficient and productive. Although self-plagiarism needs to be avoided, the multiple use of the data gathered in research is often legitimate. After selection of a particular target audience(s), a variety of ad hoc styles of presentation is discussed (such as the case study, ethnography, phenomenology, and so forth). The pros and cons of these options are analyzed in a strategic manner

Qualitative methods are growing in respectability and applicability. They provide a range of tools that can fruitfully serve both scholars and practitioners. I hope that this short book will help introduce these methods in ways that serve the world of business research.

PART I:

THE RISE OF QUALITATIVE METHODS

Prologue

For many years, quantitative and scientific methods dominated both scholarly and practitioner business research. Because of this trend, many business investigators relied almost entirely upon "formal" techniques. Being shackled in this way, the business disciplines were not as intellectually and methodologically rich as they otherwise might have been. Specifically, the techniques developed in the humanities and the qualitative social sciences were underutilized. These developments were unfortunate.

This observation begs the question: What caused this unhappy situation to develop? Equally important is a consideration of how and why qualitative research is now gaining respect. Chapter 1 addresses these issues.

Ultimately, researchers make two strategic decisions. The first involves the degree to which the phenomena being investigated will be manipulated. The second is concerned with the degree to which the data-gathering process is controlled and systematized. In scientific research, manipulation often takes place and the process of data gathering/recording tends to be tightly controlled. In qualitative research, in contrast, these requirements are usually more relaxed. These are decisions that should not be considered good or bad, but viewed as strategic options that are chosen with reference to the situation.

Although more formal methods long dominated, recent developments in business research (such as the naturalistic movement in consumer research and the rapid growth of business anthropology) dramatically demonstrate the growing vogue of qualitative methods in business research. Those who utilize their findings need to be aware of these tools and the options they provide.

Investigations, of course, need to be conducted for a particular purpose or purposes; a research design can provide some degree of direction in this regard. This reality creates the necessity of focusing upon a particular

target audience. Prolific writers, on the other hand, are able to use their data-gathering forays to collect data for multiple projects. Although tightly focusing and casting a wide net are somewhat contradictory paths, developing the ability to simultaneously do both is one of the secrets of a successful researching and publishing career.

CHAPTER ONE

AN INTRODUCTION AND ORIENTATION

Overview

Although quantitative and scientific methods long dominated business research and decision making, alternative "qualitative methods" are currently growing in significance and respectability. After a brief discussion of formal research strategies, alternatives are discussed and justified. Instead of viewing the choice of research methods from a rigid either/or perspective, a continuum of interrelated approaches is envisioned. The chapter ends with brief and intuitive overviews of a number of powerful qualitative methods that will be more fully discussed in later chapters.

Learning Objectives

1. Perceiving the growing vogue of qualitative research in business.
2. Understanding the methods of science, positivism, and quantitative analysis.
3. Justifying the use of qualitative methods in general and in business research.
4. Envisioning methodological choices as tradeoffs.
5. Understanding that a continuum of research options exists.
6. Gaining an intuitive understanding of a number of qualitative methods.

The Need for an Expanded Tool Kit

A strong preference for quantitative and "scientific" research has long existed within business. Often, these positive attitudes are simultaneously paralleled by a prejudice against alternatives that are typically lumped together under the category of "qualitative methods." How and why these negative feelings emerged is a topic for debate. One theory that makes sense to me focuses upon the post-World War II infighting that took place

within the ivory tower as business schools struggled to be accepted on a par with their liberal arts counterparts.

Before World War II, business schools tended to focus upon training low-level subordinates, not educating leaders. Students who were bound for important managerial roles typically sought the breadth offered by a liberal arts education and the insights it provided. During World War II, however, a shortage of military leaders emerged; as a result, innovative teaching methods were developed that relied upon practitioners to provide training in their specialized fields. The success of these programs weakened the dominance of the liberal arts in practitioner-oriented education.

The seeds of change had been sown, bearing fruit in 1959 with the publication of the Ford Foundation's *Higher Education for Business* and the Carnegie Corporation's *A Study of University-College Programs in Business Administratio*n, which is also known as *the Pearson Report*. Both complained that collegiate business programs tended to embody a trade-school mentality that turned out technicians, not strategic thinkers. Business teachers were written off as inept and ill-prepared. Research initiatives were lambasted as trivial and inept.

Taking the advice provided in these reports, business schools began to transform themselves in order to gain the respect of their academic colleagues. Scholarly initiatives within business schools multiplied. In order to impress those in other fields, business scholarship began to emulate the methods employed by the more established disciplines; doing so included a growing emphasis upon quantitative and scientific methods. This tactic was successful and the reputation of business schools rose. Thus, it appears that the vogue of quantitative and scientific methods in business was at least in part an artifact of the internal politics of the ivory tower.

In 2009, on the 50th anniversary of the publication of these blockbuster reports, their impact was reexamined. Daniel Carter (2009) suggested that a crisis in business education emerged because business scholars were encouraged to conduct research that would be respected by their academic colleagues in other fields who tended to conduct "pure," not "practitioner-oriented" research. While helping to build better reputations within academe, this strategy simultaneously encouraged business thinking to drift away from the applied orientations of business, causing many industrial leaders to dismiss the university as irrelevant. A logical extension of Carter's argument is that in the quest for scholarly respectability, business researchers began to replicate the research

methods of others, but in the process they began to distance themselves from practitioner priorities and demands.

While Carter lamented that business schools had become too methodologically rigid, others, such as Willard Entreman (2009), worried that business schools were not theoretical enough, complaining that the growing autonomy of business education had weakened the influence of other disciplines that form the intellectual foundations of business thought. As a result, Entreman suggested that business schools had come to lack an adequate breadth of knowledge. One artifact of this trend may be the fact that for many years, qualitative methods were relegated to second-class status within business research.

In any event, the time has come for business researchers to expand their tool kit in order to take advantage of a wider variety of qualitative methods. One role of this short book is to introduce these options in ways that are relevant to both scholars and practitioners. The respectability of scientific and quantitative alternatives, however, is not challenged. I merely seek to expand the tool kit that is available to researchers in a reasonable, even-handed, and useful manner.

The Scientific and Quantitative Traditions

Although the vogue and dominance of quantitative and scientific methods in business research may have resulted from the internal politics of the ivory tower, no serious scholar will doubt their power and usefulness.

Positivism is a specific empirical research strategy that has made a profound impact; it asserts that culture, society, and human responses (paralleling the "natural world") operate according to laws that can best be examined through controlled empirical analysis, not with reference to introspection or some type of analysis that is based on subjective insight.

As a result of this trend in research methods, for example, psychologists such as John B. Watson turned away (in the early 20th century) from humanistic and qualitative tactics of investigation. Watson's legendary career was highlighted by his so-called behaviorist manifesto entitled "Psychology As the Behaviorist Views It," which was published in 1913. The behaviorism that Watson advocated focuses exclusively upon studying what people actually do, not what is going on in their minds. The decision to conduct research in this manner was based upon Watson's belief that relying solely upon empirically observable phenomena is the only objective method for studying human behavior and response. In the decades that followed, psychology rejected its humanistic and subjective

origins and adopted a strong reliance upon scientific methods. This behavioristic style of research dominated when business researchers began to seek parity with their colleagues in other disciplines by borrowing methods that would be respected by others.

Psychology, as a role model, had aggressively turned away from the subjective and intuitive theories posed by pioneers such as William Wundt (Bringman 1975) and William James (1890), centering upon more "rigorous" alternatives championed by leaders such as Watson. A loyal opposition, represented by psychologists such as Abraham Maslow, however (1954) continued in a humanistic spirit. In business, the humanistic influence tended to be confined to anecdotal examples presented in introductory courses in management, organizational behavior, and marketing.

On the one hand, positivistic social science can be viewed as an extension of the tactics of science that came into vogue during the 18th-century dominance of the *Age of Enlightenment* (Israel 2001). In the mid-19th century, this basic method was embraced by sociologist Auguste Comte (1859) and a few decades later by French sociologist/anthropologist Emile Durkheim (1895). These methods continue to exert a powerful force, although anthropologists and some sociologists (such as members of the Chicago School of Sociology including William Whyte 1956), expand beyond them.

These empirical methods of science and quantitative analysis concentrate upon facts that can be gathered in a rigorous manner while paring the assumptions that must be embraced to a minimum. As discussed above, various forms of empiricism and positivism in business research parallel psychology, which under the leadership of the behaviorists emerged as a bastion for "rigorous" modes of investigation involving human subjects and behavior.

A basic tactic of such research strategies, of course, is to begin with a "null hypothesis," which initially assumes that no relationship exists between two phenomena. An example of a null hypothesis in business research might be "There is no relationship between a particular advertising campaign and the amount of a product that is sold."

Having stated this premise, the researcher gathers evidence in order to determine if this statement (the null hypothesis that asserts that no relationship between advertising and sales levels exists) can be challenged. Ronald. A. Fisher reminded us that, "it should be noted that the null hypothesis is never proven or established, but is possibly disproved, in the course of experimentation" (1971, p. 19).

One way to do so involves gathering evidence in two target markets that are "the same" except that one has been exposed to the advertising campaign and the other has not. Having manipulated the samples in this manner, various tests (typically quantitative and statistical in nature) are applied to the evidence to see if significant differences in sales appear to exist. If a relationship is demonstrated at a certain level of statistical certainty, the null hypothesis is defeated (suggesting to a certain degree of confidence that a relationship does exist, though not actually proving so).

Thus, in an example of an intellectual sleight of hand, "defeating the null hypothesis" demonstrates (in a convoluted sort of way) that a relationship does exist. The researcher, however, avoids making the assertion final and merely points to statistical probabilities, not "truth." Thus, the null hypothesis is rejected only at a certain level of probability. If the null hypothesis is not rejected at a predetermined level of statistical certainty, the researcher concludes that no relationship between the advertising campaign and sales levels can be established. Otherwise, a relationship is recognized at a specific level of statistical confidence.

This example of business research is identical to the tactics used in countless scientific investigations in a wide variety of fields. Let's say a doctor is conducting cancer research. The null hypothesis might be that "there is no relationship between the propensity for the patient to be cured and the use of the drug being tested." Two groups can be studied; one takes the drug, the other gets a placebo. Statistical tests are performed and evidence is gathered. Based upon this investigation and the statistical analysis that stems from it, the null hypothesis is (or is not) confirmed.

Similar tactics of investigation (such as the example involving the power of advertising discussed above) long dominated business research. These methods have made strong and constructive contributions. I (and all right-thinking business researchers) applaud these methods as powerful, respectable, and useful.

Basics of scientific investigation are portrayed in Table 1-1:

Table 1-1. The Scientific Method: An Overview

Issue	Analysis
Positivism	The positivistic method suggests relationships are best discovered and analyzed using controlled empiricism.
Inspiration	Inspired methods stemming from the *Age of Enlightenment* and its focus upon rational thought. These methods were used, in part, to impress other academics as business schools sought respectability.
Null Hypothesis	Investigations begin with a null hypothesis, which asserts that there is no relationship exist. This position is held until convincing alternative evidence is presented.
Defeating Null	If the null hypothesis is defeated, a relationship involving the phenomena being examined is demonstrated (at a certain level of statistical certainty).
DISCUSSION The scientific method is a powerful tool and it serves well. Its significance is not questioned here, although other techniques are valuable and legitimate.	

Unfortunately, however, some overly enthusiastic individuals who embrace positivism and the scientific method are apt to conclude that other techniques (such as qualitative methods) are methodologically unrespectable. Holding these views is counterproductive because they might discourage the use of a range of legitimate and valuable analytic tools. This book argues that although the weaknesses and limitations of all methods need to be acknowledged, researchers require the flexibility provided by a rich tool kit and one that accepts qualitative methods (among others) as viable options. As will be demonstrated, qualitative methods have a vital contribution to make, possess their own standards of rigor, and they should be acknowledged accordingly.

Broadening Choices and Perspectives

Today, there is an increased understanding that choosing a particular research method often involves tradeoffs in which specific benefits are gained by tolerating certain limitations and liabilities. Evaluated in this manner, it is obvious that methods are usually not inherently "good" or "bad." Investigators tend to make choices with their eyes open regarding their needs, priorities, and the levels of risk they are willing to tolerate.

Invariably, those conducting research must decide how they will pursue their analysis. A variety of options exists from which to choose. Eron Guba (1978), for example, points out that researchers need to make tactical decisions regarding at least two dimensions:

1. *The degree to which the investigator manipulates the observed phenomena.*
2. *The degree to which constraints are placed upon the process of recording empirical evidence used to draw conclusions.*

Scientific and quantitative investigations typically rely upon manipulation and the use of predetermined categories for recording evidence. Qualitative research, in contrast, is less prone to do so. These are calculated decisions that are made by the individual researcher. Embracing either scientific/quantitative or a qualitative/humanistic approach involves accepting certain tradeoffs the researcher is willing to make. We hope these choices are made for good and justifiable reasons.

When the scientific/quantitative researcher aggressively manipulates the situation when observations are made, for example, the variables under investigation are controlled in order to eliminate a wide array of distorting impacts that could otherwise cloud the findings.

This tends to be done with reference to what scientists refer to as "independent" vs. "dependent variables."

An independent variable is a phenomenon a scientific observer manipulates as part of an experiment. The strategy involves controlling one variable to see if doing so triggers concomitant changes in something else. If statistically significant relationships are observed, a case of cause and effect might be theorized. A study of worker productivity, for example, might seek to understand if the noise level on a production floor impacts the quality of the products. In this case, the level of noise would be the independent variable. Workers in five similar production zones might be subjected to different levels of noise.

The dependent variable, in contrast, is the phenomenon being examined in the research project (in this case some measure of productivity). This phenomenon is not controlled in any way by the investigator as is the case with the independent variable. If a correlation is found to exist between the independent and dependent variables, a cause-and-effect relationship between them might be statistically suggested. Care needs to be used when drawing conclusions, however, because false correlations sometimes exist.

This research strategy often leads to important insights. When manipulating a situation in a heavy-handed manner, however, the investigator

may risk creating an artificial environment that exerts distorting influences. Thus, choosing to influence an independent variable is a tactic that might achieve benefits, but does so by accepting risks and costs. Because of these risks and tradeoffs, it is one option and it needs to be exercised with caution.

The classic "Hawthorne effect" (Landsberger 1958), for example, acknowledges that distortions can result when researchers manipulate the environment. This truism of management thought emerged as the result of an investigation regarding the relationship between the amount of light on a production floor and the productivity of the workers. As empirical evidence was gathered, the light was reduced in increments, eventually to a level where workers would have trouble accurately performing their assigned tasks. Nonetheless, production and accuracy continued to increase even under these handicapping conditions. When seeking to understand this counterintuitive empirical evidence, the researchers found that the workers knew that they were being watched and, as a result, they had made a heroic effort to do a superior job. In short, controlling the environment in an overt manner distorted the findings. Manipulating may be a legitimate tactic, but researchers need to recognize and acknowledge the misrepresentations that might arise when doing so.

A second aspect of scientific or positivistic research that is mentioned by Guba is the fact that when data are gathered and reported, the findings tend to be reported in rigid ways. Doing so results in evidence being forced into predetermined categories.

On a positive note, doing so can lead to greater rigor because the responses that are provided by informants have been standardized. By doing so, furthermore, we can more easily compare and juxtapose the evidence that is gathered. In addition, data that have been coded in such a manner can be routinely examined using statistical techniques. These are benefits that derive from using predetermined criteria to record findings.

By limiting the input of participants or informants and/or the ability of data gatherers to fully record the responses provided, however, the full richness and complexity of the data might be masked and unavailable for analysis. The predetermined options for recording evidence, furthermore, might not be appropriate for a specific research project and/or for a particular group of subjects being studied. Thus, although employing predetermined categories for recording data can be justified, doing so might simultaneously possess drawbacks that need to be acknowledged.

Qualitative investigations, in contrast, often manipulate the environment and the informants to a lesser and less intrusive degree. In addition, qualitative research is more prone to allow a flexible means of gathering and recording evidence. The result is likely to be more realistic,

making the data gathered potentially richer. Gaining these benefits, however, may lead to a number of problems making the data unwieldy and harder to analyze. In short, there is no perfect solution. Both quantitative and qualitative research have their specific strengths and weaknesses.

Graphically, these tradeoffs can be evaluated as presented in Table 1-2:

Table 1-2. Guba's Tactical Variables

Issue	Scientific Justification	Qualitative Response
Manipulate environment	Scientific/quantitative research manipulates the environment to as a research technique.	Manipulating the environment might not be possible. Doing so might be contrived.
Evidence constraints	Controlling evidence can help eliminate subjective errors and facilitate quantitative and statistical analysis.	Controlling, research eliminates some evidence and can prevent probing for relationships that were not previously envisioned.
DISCUSSION The scientific method typically manipulates the environment and place tight constraints on how data are gathered. Qualitative methods, in contrast, point to potential distortions and limitations that might arise from using scientific/quantitative techniques.		

The point being made is that the degree of manipulation and the use of predetermined categories are tactical tradeoffs. These choices are best envisioned as consciously preferred options that are embraced for specific purposes. Certainly, when researchers make such decisions, their tactics need to be acknowledged and justified. On the other hand, most methods cannot be universally condemned or praised; the circumstances need to be considered.

Predetermined responses such as "Yes" vs. "No," "Answer on a 5-point scale with 1 strongly agree and 5 strongly disagree" and so forth structure responses in a manner that can be easily quantified and analyzed statistically. A downside of doing so, however, is the fact that the data gathered may be forced into predetermined categories that are artificial. In addition, the research is apt to merely deal with issues that were envisioned by the investigator before the research began. Under these circumstances, capturing novel and unanticipated responses can be difficult. Qualitative alternatives, in contrast, might be better able to deal with real-life issues and atypical answers.

In seeking to eliminate distortion, many scientific and quantitative researchers seek to control as many variables as possible. By doing so, they hope to make their research more defensible by limiting the ability of a rival hypothesis to challenge their findings. In a nutshell, a rival hypothesis is simply another viable or plausible explanation of the observed phenomena. If a rival hypothesis cannot be rejected, two possible explanations exist, the researchers cannot assert that their explanation is correct, and the hypothesis cannot be confirmed (Campbell & Stanley 1973; Cohen 1990).

A wide range of options exists for recording data. Each has its own strengths and weaknesses. Will respondents be given greater freedom to express themselves, or will the process of research channel their responses? Will research take place in a controlled environment or will it be more reflective of "real life? Whatever option is chosen needs to be explained and justified.

Specific Measures of Credibility

Advocates of science and quantitative methods, unfortunately, often imply that the techniques they use are inherently superior and should be universally embraced by all investigators. But, as we have seen, the issue is more complex than that.

The qualitative social sciences, for example, have their own methods. Those who follow this research tradition possess their own tailored criteria of intellectual respectability: well thought out guidelines for conducting legitimate research (to be more fully discussed in Chapter 6). All too often, unfortunately, those who promote quantitative and scientific methods make the error of evaluating qualitative research using guidelines of appraisal that were designed to critique their own work, not that of others. Doing so, of course, is akin to comparing apples and oranges.

Qualitative methods and research projects that use them need to be evaluated in an appropriate manner. As discussed above, qualitative methods (a) typically exert less control over subjects and the environments where observations take place, and (b) allow for more fluid and flexible procedures when recording data. These decisions make a more robust recording of reality possible while potentially allowing distortions to simultaneously creep in.

This sort of analysis is often referred to as "naturalistic." Within both scholarly and practitioner investigations, naturalistic inquiry is growing in influence and respectability. Business anthropology, for example, often combines qualitative and naturalistic methods to advantage. Consumer

research is a more specialized and circumscribed discipline that deals with the acquisition, use, and disposal of products; it often uses naturalistic techniques to do so.

The Naturalistic Movement

Naturalistic research is a form of qualitative investigation that is typically conducted "in situ" (that is, within its natural environment), not in some artificial locale such as a laboratory or experimental setting. The style of research, furthermore, attempts to minimize the degree of manipulation the subjects of investigation experience. Attempts are made to avoid overtly interfering with the behavior being observed (even when the researcher is nested within the situation being examined as is the case in participant observation). In short, the researcher strives to avoid influencing both the environment in which observations take place and the subjects who are being studied. This, of course, is very different from the strategies commonly embraced by scientists who consciously manipulate independent variables in order to observe changes that might occur in the dependent variable.

Naturalistic observation has advantages and disadvantages that the researcher needs to consider. Because behavior is observed in a real-life setting, the findings may appear to be more credible than those that take place in a contrived experimental situation. In addition, research that might be considered unethical if forced on unwary subjects can be legitimately explored in a naturalistic manner where outside intervention is not required in order to gather the data that are to be analyzed.

Naturalistic investigation is a growing field within business research. Two representative examples include (a) business anthropology, and (b) the naturalistic research stream associated with consumer research. Each is briefly discussed below.

Business Anthropology

The field of anthropology, of course, is a well-established theoretical social science. Although largely a "pure science," the discipline has a strong practitioner wing (known as "applied anthropology). In recent years, business anthropology has emerged as a growing field in which researchers typically embrace and adapt the qualitative research techniques anthropologists have long employed. Thus, business anthropology can be envisioned as a specialized form of applied anthropology. (For a general overview, consult my *Rethinking Business Anthropology* [2012]). Thus

far, however, business anthropology has not focused upon the scientific and quantitative methods that some anthropologists, such as George Peter Murdock (1949), Raoul Naroll (1970), and those influenced by them have developed.

The contribution of ethnographic methods within business anthropology is a particular example of adapting qualitative anthropological methods to the needs of business researchers. Ethnography in theoretic anthropology is usually envisioned as a full cultural portrait that showcases the relationships between a wide array of cultural, social, and/or economic variables. Ethnographies typically rely upon a variety of evidence including interviews, historical analysis, participant observation, surveys, and so forth. Qualitative methods tend to be a keystone in such projects. Academic ethnographies tend to be complex and multifaceted macro-analyses of people and their ways of life.

In business anthropology, in contrast, the techniques of ethnographic analysis tend to be focused upon rather narrow issues such as how people use a particular product. By seeking an understanding of a narrow slice of life, decision makers hope to gain insights that will lead to better and more relevant strategies and tactics. Not only does the universe of discourse typically much narrower in business ethnographies, the time frame allowed for the research project is usually significantly shorter.

Consumer Research

Consumer research, as it now exists, can trace its roots to marketing as a specialized subfield that explores the acquisition, consumption, and disposal of products. Initially, consumer research was primarily influenced by the theories and methods of psychology and, as a result, it tended to embrace the scientific and quantitative research strategies popular in that field. Over time, however, consumer researchers became equally concerned with social influences and the field increasingly borrowed concepts from sociology, anthropology, and the naturalistic movement.

In the 1980s, a naturalistic shift in consumer research gave rise to a high-profile research stream; since that time, this movement has continued to grow and mature. As a result, those who study the consumption process have been given the tools needed to transcend psychological orientations (and their scientific inclinations) by expanding the use of qualitative research. Whereas anthropologists may envision qualitative methods in business to be an extension of their field, qualitative consumer researchers are likely to identify with naturalistic research, in general, and look at anthropology as a specific aspect of the naturalistic approach.

Thus, qualitative research is emerging as a powerful force in business research that has roots in specific disciplines such as anthropology in addition to being a part of the general trend towards naturalistic inquiry. Graphically, naturalistic research can be depicted in Table 1-3 as:

Table 1-3. Naturalistic Research

Issue	Analysis	Implications
Minimal manipulation	Minimal manipulation of subjects.	View people acting "normally".
In situ	Setting not controlled. Environment is not manipulated.	Normal environment. Relaxing of scientific rigor might be required.
Tradeoffs	Protecting scientific rigor is relaxed in order to gain otherwise unavailable data.	Methods, orientations of investigators do not overtly influence the research design.
Business anthropology	Business anthropology offers an array of naturalistic practitioner methods.	Business anthropology has advanced the cause of qualitative research in business.
Consumer research	Employs a wide variety of naturalistic methods, expanding beyond scientific approaches.	Consumer research is primarily derived from the broader naturalistic movement, not merely anthropology.
DISCUSSION Naturalistic research takes place among people who are (as much as possible) living their lives without outside interference or influence. Although naturalistic research does not meet the demands of scientific inquiry, it should be evaluated according to their own criteria.		

Representative Qualitative Methods

Qualitative and naturalistic research can be conducted in a variety of ways. As a result, these various methods collectively provide a complex tool kit of significant value to business researchers. In this book we will explore several of these options, including (a) surveys, (b) focus groups, (c) in-depth interviews, (d) participant observation, (e) ethnography, and (f) ethnology. In order to orient the reader in regard to what is to come and

to juxtapose these methods, each of these techniques is given a thumbnail discussion here before being discussed at greater length in later chapters.

Surveys

In surveys, a group of informants is asked questions and their responses are recorded and analyzed. The questions in many surveys are standardized and the answers manipulated statistically.

If a survey requests facts that are "exact" objective data are gathered. This would be true when asking questions such as "In what year were you born?" "How much do you weigh?" "What is your level of education?" "How old is the car you currently drive?" and so forth. Although the research design might need to compensate for human error when answering some of these questions, the evidence gathered would be objective, not qualitative in nature.

In other situations, the researcher might seek qualitative data; these are recorded in a quantitative manner. Consider questions such as "On a scale of 1 to 5 do you like this product?" In this case, qualitative data are recorded according to a quantitative scheme because informants are asked to provide quantitative responses to a question that is subjective in nature. The responses to this question might vary with the person; thus, working-class people (who do not expect high quality) might rate the product "4" (very good) if slight flaws exist while the affluent (who are more demanding) might respond with a "2" (fair) if any problems are observed. If both groups were evenly distributed in the sample surveyed (and if the researcher did not recognize the significance of these differences), the average rating for the product would be "3" (acceptable). In reality, however, two target groups exist and the differences between them are significant: "2" (fair) and "4" (very good), respectively. If this reality is not recognized, strategic plans based upon the rating of "3" might be hurtful and costly.

Thus, some survey questions may be qualitative and subjective even when the data are recorded in a quantitative manner.

Surveys can be quick and cheap. Within a day, for example, a researcher might be able to create a survey instrument, deploy interviewers to the field, and manipulate the evidence statistically in search of correlations.

A relatively large array of people possess the ability to function as fieldworkers and conduct surveys. Anyone can serve who is "presentable" to the target being interviewed and has basic social and clerical skills. An advanced education is not required, nor, in most cases, a sophisticated and

specialized knowledge of the subject being investigated. In some situations (such as surveys that are conducted online or through the mail) no physical contact between the subject and an interviewer is necessary.

In most cases, surveys are administered to a tiny sample that the researcher concludes is adequately reflective of the whole. The sampling method can range from a "convenience sample" of subjects (who are easily available and willing) to a subset that has been screened via some scheme in order to make it representative. Researchers are expected to inform the reader regarding whatever sampling decisions were made and the reasons why the sample is deemed to be adequately representative.

In some cases, however, a survey may be constructed that includes all members of the group being investigated, not a sample. A relatively small number of firms manufacture automobiles in the United States (25 to 50?) These companies vary in size and complexity. As a result, any sampling strategy is likely to distort and not be representative. Under these circumstances, a study might survey every automobile manufacturer, not a sample. In the vast majority of cases, however, survey research examines a tiny sample of a large whole in order to simplify and cheapen the research process.

Surveys are economical, quick, and they typically use small samples that are deemed representative. Although the evidence gathered is typically analyzed statistically, qualitative data may be recorded even though they are coded in a quantitative manner.

Focus Groups

On some occasions, researchers possess such a clouded and uninformed picture of what is being studied that they do not trust themselves to develop appropriate questions. Under such circumstances, cautious investigators may employ tactics that give informants a greater role in framing the conversation and dictating what will be discussed. The focus group method is a prime example of this respondent-driven approach.

In focus groups, facilitators adopt a less than aggressive role in setting the tone and the topics of conversation. This tactic is employed in the belief that the synergism of the group provides the key needed to tease out the most relevant issues. As a result, the guidance provided by facilitators is minimal, although some general hints are typically provided to initially "prime the pump." Facilitators also serve as masters of ceremonies or referees, and they keep the conversations on track. This abdicating of formal leadership, however, does not mean that focus group facilitators are superfluous and unimportant. Just the opposite; skill and tact are required

to gently nudge the discussions in the right direction and ensure that all participants contribute when overly enthusiastic extroverts threaten to overshadow the shy and unassuming.

Focus groups typically convene in a comfortable room where participants will feel relaxed and at home. In complex venues, recording equipment, video recorders and so forth fully document the event. Coffee, tea, and snacks tend to be readily available. A small group (usually 8 to 10 people) is assembled after being selected according to some criteria. If a group is too large, the intimacy (which is important in focus group research) may be lost. The attempt is made to create a friendly and open atmosphere where people are not inhibited and are willing to open up. After introductions and basic instructions are given, the facilitator poses a question to get the ball rolling. Invariably, the query is open-ended and designed to trigger a broad, freewheeling discussion that will flow in whatever direction the group drifts. At this point, the group is encouraged to take control in a no-holds-barred brainstorming session. The facilitator's goal is to provide respondents with an environment where they can "think out loud" in a collective environment that encourages immediate feedback.

Because the facilitator provides minimal leadership, the information gathered tends to be a product of the group, not the research agenda being pursued. The resulting spontaneous responses often provide invaluable insights that would have been hard to duplicate using formal, scientific, or quantitative research methods.

Focus groups can often be completed quickly and employed when the researcher has a minimum understanding of the issues being addressed. Thus, it may serve well during the preliminary stages of research or if a speedy response is necessary. Another benefit is that since focus groups tend to be recorded, others can view and evaluate the empirical evidence as it was gathered.

In-depth Interviews

Surveys ask uniform/standardized questions, typically to a relatively large sample of informants. In-depth interviews, in contrast, are administered to few subjects in a much more intimate, tailored, and detailed manner. Informants are allowed greater freedom in their responses. Questions tend to be open-ended, allowing for unique replies. A typical goal is to gain a candid, almost "stream of consciousness" type of response.

Searching for rich and candid responses, the researcher avoids interrupting informants in order to keep them at ease and to avoid breaking their chains of thought. The order in which questions are asked is often