Qualitative Business Research Methods

This course introduces to theory and practice of qualitative marketing and consumer research. Students will learn a variety of tools, techniques, and principles needed for the planning and execution of top-quality qualitative research. We will cover issues like formulating the right research question, designing a qualitative study, choosing the right study method, conducting data gathering, doing rigorous data analysis, and producing compelling research reports.

This course is designed especially for students preparing to start their master's thesis projects. You may take the course at any time during your master's studies, but it is encouraged not to start your thesis until you have completed this course.

The responsible professor for the course is **Dr. Henri Weijo**, Associate Professor in Marketing at the Department of Marketing at Aalto University and **Pelin Geyik**, PhD Student the Department of Marketing at Aalto University.

1. LEARNING OUTCOMES

Students will gain…

- Understanding of epistemological and ontological underpinnings of qualitative research
- Ability to formulate research questions by evaluating existing literature and identifying appropriate contexts for qualitative studies
- Experience in qualitative methods of data gathering, including in-depth interviews, ethnography, and netnography
- Experience in analysis of qualitative data, including computer assisted analysis
- Learning to apply evaluating criteria for qualitative research
- Experience in writing excellent qualitative research reports
- Improvements in critical thinking skills and creativity

2. ASSESSMENT AND GRADE BREAKDOWN

The course is evaluated on the grading scale (0-5). Passing the course requires completing assignments and obtaining at least 50 points:

90+	5
80+	4
70+	3
60+	2
50+	1
<50	0

Breakdown of the final grade (100%):

- **Class participation**   **10%**
  - In-class participation   5%
  - Perusall reading assignments   5%

- **Final reflection paper**   **15%**

- **Individual research assignments**   **15%**
  - Interview and transcript   7.5%
  - Interview analysis   7.5%

- **Group research project**   **60%**
  - Pitching research context   5%
  - Interview Guide   5%
  - Ethnographic or Netnographic site search   5%
  - Final presentation   15%
  - Final paper   25%

3. CLASS READINGS

This course will draw mostly from the following textbook:

> Belk, R., Fischer, E., & Kozinets, R. V. (2012). *Qualitative consumer and marketing research*. Sage.

In addition, students are expected to read a collection of articles and book excerpts. The list is preliminary and can be found along the course schedule below.

For each class after the introductory lecture, there will be assigned readings on Perusall.com. Students are expected to read each article and engage in meaningful discussion with other students prior to class. We expect you to familiarize yourself with the articles and apply the relevant theories in your group and individual assignments.

Please register to the course by a) creating an account on www.perusall.com, and b) registering into the course with the code **WEIJO-GZJGW.**

Your Perusall score depends on:
- Contributing thoughtful questions and comments to the class discussion, spread throughout the entire reading
- Starting the reading early
- Breaking the reading into chunks (instead of trying to do it all at once)
- Reading all the way to the end of the assigned reading
- Posing thoughtful questions and comments that elicit responses from classmates
- Answering questions from others
- Upvoting thoughtful questions and helpful answers

4. APPROXIMATE COURSE WORKLOAD

Here is an expected breakdown of the hourly course workload, based on instructor estimates.

Readings*	57
Class contact hours and tutoring	24
Planning, conducting, and transcribing interview	10
Planning, conducting, and transcribing ethnography and netnography	15
Analysis of data	23
Working with group on final deliverables	33
TOTAL HOURS	**162**

evaluated at 3 hours per reading

5. ETHICAL RULES

Please refer to Aalto University Code of Academic Integrity:

https://into.aalto.fi/display/ensaannot/Aalto+University+Code+of+Academic+Integrity+and+Handling+Violations+Thereof

6. COURSE POLICIES

Course delivery policies

All course deliverables are submitted via MyCourses. All deadlines are firm and depending on how late the students submitted their work, this can incur a point penalty. Submissions that are later than 24 hours will not be graded at all. Submissions will be submitted to TurnitIn evaluation for plagiarism checks.

Group work policies

If problems arise in group work, concerned students are advised to contact course instructors as problems arise. Waiting until the course is over to bring concerns forward is inadvisable, as it complicates the instructors' ability to reconsider grades.

Zoom classroom policies

The contact sessions are a mixture of lectures, discussions, and exercises. For each of the contact sessions you are expected to have read the assigned readings. To ensure a pleasant Zoom environment:

- Please mute your microphone when not speaking.
- Please be active! Ask questions, give your opinions. All ideas are welcome in the classroom and are open to debated. If you want to comment or ask a question, please use the raise hand feature. (You may also use the chat)

- Please do not take screenshots, cell phone pictures, or otherwise record the meeting, your classmates, or your instructor without express permission to do so.
- Please remember to express your ideas in a way that is respectful to others.

Communication policies

All official course communication will take place through the **News** forum on MyCourses. Anything posted in that forum will be forwarded to your Aalto email, so please make sure you check it periodically.

Please use the **Discussion** forum if you have any questions or feedback regarding course topics, lectures, materials, assignments etc., as someone else is likely to have the same question. If you want to share relevant articles or news stories, you can do so in the Discussion section, too.

Please only use **email** if the matter is very personal or very urgent (ie. you are missing a class because you are home sick). We will not be answering any inquiries regarding anything that can be easily found in the syllabus via personal email.
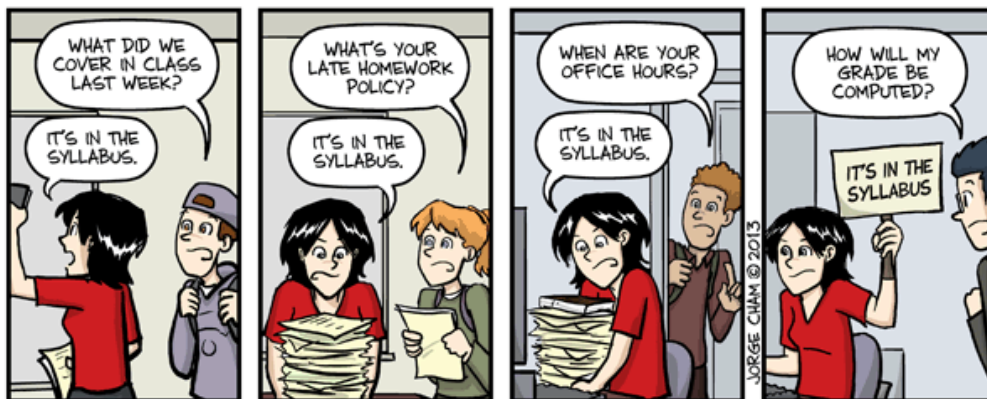
IT'S IN THE SYLLABUS

This message brought to you by every instructor that ever lived.
WWW.PHDCOMICS.COM

7. CURRENT SCHEDULE AND READINGS

Course Introduction and Practicalities

Qualitative Research in Marketing

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Introduction: What is qualitative research? *Qualitative consumer and marketing research* (pp 1-15). Sage.
- Goulding, C. (2005). Grounded theory, ethnography and phenomenology: A comparative analysis of three qualitative strategies for marketing research. European journal of Marketing.

Optional reading:

- Gummesson, E. (2005). Qualitative research in marketing: Road-map for a wilderness of complexityand unpredictability. European journal of marketing.

Planning a Qualitative Research Project

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Getting started: how to begin a qualitative research project. *Qualitative consumer and marketing research* (pp 16 - 30). Sage.
- Arnould, E. J., Price, L., & Moisio, R. (2006). Making contexts matter: Selecting research contexts for theoretical insights. Chapter in Belk, Russell W. "Handbook of qualitative research methods in marketing", 106-125.

Doing Interviews

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Depth interviews. *Qualitative consumer and marketing research* (pp 31 - 56). Sage.

Optional reading:

- Arsel, Z. (2017). Asking questions with reflexive focus: A tutorial on designing and conducting interviews. Journal of Consumer Research, 44(4), 939-948.

Monday 27 September

Qualitative Data Analysis 1/2

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Approaches to data analysis, interpretation and theory building for scholarly research. *Qualitative consumer and marketing research* (pp 138 - 158). Sage.

Optional reading:

- Spiggle, S. (1994). Analysis and interpretation of qualitative data in consumer research. Journal of consumer research, 21(3), 491-503.

Wednesday 29 September

Ethnographic methods

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Ethnography and observational methods. *Qualitative consumer and marketing research* (pp 57 - 91). Sage.

Optional reading:

- Spradley, J. P. (1980). Participant observation. Waveland Press. Chapter: "Making descriptive Observations"

Monday 4 October

Qualitative Research in Digital Spaces

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Online observation and netnography. *Qualitative consumer and marketing research* (pp 92 - 119). Sage.
- Caliandro, A. (2018). Digital methods for ethnography: Analytical concepts for ethnographers exploring social media environments. *Journal of Contemporary Ethnography*, *47*(5), 551-578.

Data Collection, Analysis, and Creativity

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Data collection aids. *Qualitative consumer and marketing research* (pp 120 - 138). Sage.
- Belk, R., & Sobh, R. (2019). No assemblage required: On pursuing original consumer culture theory. *Marketing Theory*, 19(4), 489-507.

Qualitative Data Analysis 2/2

Class readings:

- Gibson, W., & Brown, A. (2009). Working with qualitative data. Sage. Chapter: "Identifying themes, codes and hypotheses"

Qualitative Research and Consulting

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Analysis, theory, and presentation for managers. *Qualitative consumer and marketing research* (pp 159 - 182). Sage.
- Madsbjerg, C., & Rasmussen, M. B. (2014). An anthropologist walks into a bar. *Harvard Business Review*, 92(3), 80-90.

Presenting Research Results

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Presenting, disseminating, and sharing. *Qualitative consumer and marketing research* (pp 183 - 200). Sage.
- Gopaldas, A. (2016). A front-to-back guide to writing a qualitative research article. Qualitative Market Research: An International Journal, 19(1), 115-121.

Final Session: Presentation Day

Class readings:

- Belk, R., Fischer, E., & Kozinets, R. V. (2012). Final thoughts. *Qualitative consumer and marketing research* (pp 201 - 210). Sage.
- Epp, A. M., & Otnes, C. C. (2021). High-Quality Qualitative Research: Getting into Gear.

8. ASSIGNMENTS

To best appreciate and understand qualitative research, one must experience it firsthand. There are multiple deliverables, both individual and group ones. All of them are compulsory for the completion of the course. The actual assignments are elaborated in full in Appendix 1. Here you will find a summary of all deliverables and their due dates.

All deliverables due by midnight **except** Final Presentation which is due 15 minutes before class that day.

Individual deliverables

Interview transcript	29.09.2021
Individual analysis	06.10.2021
Final reflection paper	04.11.2021

Group deliverables

Pitching research context	21.09.2021
Interview Guide	24.09.2021
Ethnographic or Netnographic site search	17.10.2021
Final presentation	20.10.2021
Final paper	04.11.2021

All assignments are submitted via MyCourses.

Appendix 1: Assignments and Deliverables

This section explains the deliverables in the order that student will have to complete them.

1. Pitching Research Context (group deliverable)

This assignment connects to class #3, Planning a Qualitative Research Project, and is to be completed after the lecture. The goal of the assignment is to have students choose a particular topic for their research and argue why it would make for a good study. Note that whatever you pick in this assignment will not "bind" you forever, as your group is expected to work on your research framing throughout the course. To summarize, this assignment is ultimately about matching **Research Context with Theoretical Interest.** Your group may emphasize either one of these two, but for completing this assignment, you must find a match between the two! See especially the reading "*Making Context Matter*" to understand how you can argue for either a theory-driven or context-driven project.

Your proposal should be no more than two pages, preferably one, (12 point font, 1,5 line spacing, 1" margins) and should include:

1. **Brief description of context:**
   1. Explain your context and why you choose to work on it. Also discuss why it is important.
   2. Who are these consumers? (Like "Knitting enthusiasts" or "Rock climbers" or "refugees in Finland")
   3. The novelty or peculiarity of this context (particularly if you want to claim that this context might illuminate something understudied, you might want to contrast it to prior "known" consumer populations)

2. **Brief description of theoretical interest**
   1. Identify some key articles in marketing or consumer research in the given area or 'stream', discern potential research gaps and then select one for your study.
      1. **Tip:** A good way to find research gaps is to look at the "Future Research" sections of recent articles
   2. What kind of theories from consumer research do you currently think (remember, these always change as projects evolve!) might help illuminate this context
      1. Identity theory? Community theory? Relationship theory? Taste theory?
      2. Don't just name the theory! Explain why you think this is a good match with the context and what you expect to find!

3. **Offer a preliminary research question**
   1. It is taken for granted that your research question will change during the course, but please offer some sort of guiding question going in!
      1. "How do knitting enthusiasts construct their identities?"
      2. "How do refugee communities in Finland consume?"
      3. "How do rock climbers express and evaluate taste?"

This assignment is **5%** of the final grade. Note that groups may be asked to revise this work if it is not satisfactory, as choosing the right context is essential moving forward.

2. Interview Guide (group deliverable)

As a group, prepare **a semi-structured** personal interview guide **on your research topic.** The interview guide is to be completed after lecture #4, which focuses on depth interview. We will provide a preliminary template for you to continue filling.

The interview guide must include

1. Preliminary "ground tour" questions relating to relevant informant background information (family background, "life story")
2. Questions relating to overall consumption practices or lifestyles
3. Questions relating to the context and theoretical interest (the majority of the questions)

Your grade will depend on how well the questions are crafted to match with research aims and how well the questions match with theorization on good interviewing, which will be covered in class. Keep in mind that the length of the interview should be **30 to 60 minutes**, so your interview guide should be max 2 pages, one page is usually enough. (12 bullet point font, 1.5-spacing). The assignment is **5%** is overall grade.

3. Interview Transcript (individual deliverable)

Even though you will be working in groups, each group member will do an individual interview. You need to record your interview and transcribe it. Remember, the recorded interview should be 30 to 60 minutes in length and that transcription will take you 2-4 times longer than the actual interview.
- You can either use Atlas.ti or a Word document in order to transcribe.
  - If you choose the latter, remember that you'd need to import your Word document into Atlas.ti for coding during your next assignment, Individual Analysis.
  - To download Atlas.ti, please visit this site.
  - There are tutorial videos on Youtube if you need to get familiar with Atlas.ti more.

In the transcript, please include the following:
1. A brief introduction of who this person is (you can give them a pseudonym if the topic requires it) and why they were selected for interview
2. Where the interview was conducted and how long it lasted
3. Your brief reflections on how the interview went
   - Were you happy with how you interviewed? What was difficult?
   - Did something happen that might have affected the interview?
   - What would you do differently or how would you change the interview guide?
4. The actual interview transcript itself
   - Everything must be transcribed verbatim
   - Include pauses ("…") or other relevant expressions [laughs], [sighs], [pointing at her shirt], [angrily waving hand]

You are expected to manage the interview like a well-trained qualitative researcher. Like in the previous assignment, your grade will depend on how well your interview matches with

theorization on good interviewing, which will be covered in class. The assignment is **7.5%** is overall grade. The quality of the transcript itself also affects the grade.

4. Individual Analysis (individual deliverable)

After transcribing the interview, it is time to analyze it. This first analysis assignment focuses on so-called "first-order coding" or "open coding", which will be explained in class #5. The goal is to do a thorough coding of the data, but not to move to theme building and theorization just yet.

- Go through the interview and code everything using Atlas.ti!
  - Assign labels on sentences, words, or even whole paragraphs and make observations on the data
  - Please make sure to add explanations of your codes, when necessary
- **Tip:** Absorbing your data before starting to code is important. This will enable you to better interpret and code your data. So read through the transcript before coding it!
- The submission is your **Atlas.ti project file where you coded your data.**
- You will be graded on how attentive and thorough you worked on coding.
  - Be attentive to detail and go for quantity of codes, without compromising quality, of course.
  - Applying just a few codes and slapping them onto entire paragraphs will not be enough.
  - A large number of codes will give you more opportunities to develop themes later on with your group!

The assignment is **7.5%** is overall grade.

5. Ethnographic or Netnographic Site Search (group deliverable)

The point of this exercise is to identify a potential site for studying consumers in your context. This site can be either in a physical space or online. Note that we do not expect you to include ethnographic or netnographic data into the final presentation or report, but you are welcome to include such data if you so wish.

IF YOU CHOOSE ETHNOGRAPHY:

- Come up with a potential place where you feel you could observe the consumer behaviour that your group project wants to study
- Go to this place (with adequate COVID-19 caution!) and using the Spradley Matrix (1980) from MyCourses and make preliminary observations on what data you could gather across these dimensions.
  - See MyCourses for a version that explains the relations between these dimensions. We encourage you to print out the template from MyCourses and take it with you to the field.
  - You may take photos and video, but be considerate of people's privacy
- Use as much time as you like, but we recommend that you spend **at least 60 minutes** in the venue (can be split into shorter periods). Actively take notes as you go.
- The deliverable itself is a 2-4 page report (12 bullet point font, 1,5-line spacing) with:
  - Start with a brief description of the location or context of your choosing

- o Provide engaging and vivid description of how this location "operates" from an ethnographic perspective where you draw from your matrix observations.
- o Elaborate the location by focusing on <u>at least</u> 15 combinations of dimensions (for example, actor-space; emotion-activity; actor-actor) from the Spradley matrix and explain why these dimensions are the most relevant dimensions for understanding the context
- o Include your original field notes as an appendix (does not count towards the page count)

IF YOU CHOOSE NETNOGRAPHY:

- **Identify a source to conduct netnographic research for your group project.** Please describe how this site matches criteria list below. (1-2 pages)
  - o **Relevant:** It's relevant to your research focus and questions and provide relevant information.
  - o **Active:** There are both recent and regular communications between members.
  - o **Interactive:** There are responsive communications between the participants in the group.
  - o **Substantial:** It offers various communicators and a lively energized cultural atmosphere.
  - o **Heterogeneous:** There are good number of different participants
  - o **Data-rich:** It offers data that is detailed or descriptively rich such as links to other resources, images, videos.

- **Give more details on your selected site by considering the questions below** (1-2 pages)
  - o What is the software design configuration of the site? How might it influence the social interactions there?
  - o Who are the site's most active participants? How can you determine this, through what data or visual cues?
  - o What roles do people seem to assume on the site?
  - o Who are the conversation starters?
  - o Who are the 'leaders'? How can you identify this? What are some of the most popular topics that are discussed?
  - o What is the group's history?
  - o How is this group connected to other groups? Which other groups are the members connected to?
  - o What can you learn about the demographics, interests, opinions, and values of the people using the site?
  - o Are there any specialized types of language or symbols being used? Acronyms or sayings? Shared lingo, slang, or even inside jokes, or memes? What is their meaning and history? What do they indicate about the community?
  - o Does the community have any common practices, rituals or special activities?

The deliverable itself is a 2-4 page report (12 bullet point font, 1,5-line spacing). Feel free to add examples of screen captures into an Appendix (does not count toward page count).

The assignment is **10%** is overall grade.

6. Final presentation (group deliverable)

The final presentation is supposed to mimic an academic conference presentation of your research work. The deliverable will be a pre-recorded video presentation of your project. You can use Zoom to record your PowerPoint presentation, or similar. The videos will be played in class and your video should not exceed 8 minutes. Video presentation should be sent before the final session! Be mindful that like academic conference presentations, you will have an opportunity to get feedback that you can use for your final paper.

Final Presentation Point Breakdown:

- **The Presentation Content   60%**
  - Start by explaining your theoretical problem: "What do we know about this theory, and here's what we don't know"; present a research question
  - Explain your research context well! Make it relevant or understandable through images or maybe even videos
  - Elaborate your research procedures (how the data was gathered, where etc.) and how did you analyze the data and built your themes by identifying commonalities between individual interviews!
  - Present your findings. Explain what you found and back your claims with evidence from data.
  - Discuss your findings: what novel theoretical insights were gained, how do you improve upon prior theorization, and what future research could do?

- **General presentation considerations   20%**
  - Think of how you hook your audience's attention? What do you lead with?
  - Logical order, easy to follow
  - The video is engaging and captivating
  - Visual aids (slides, examples, other artifacts) are of high quality and enhance the presentation experience
  - Transitions between topics are fluid, good tempo, the presentation spends just the right amount of time with each topic
  - Time management! (strict 8-minute deadline)
  - Possible extra points for innovative presentation "gimmicks" that work in your favor

- **Peer rankings from other groups   20%**
  - The team with the average highest rating gets the full 20%, everybody else in relation to that score

The assignment is **15%** is overall grade.

7. Final paper (group deliverable)

You should consider your final deliverable a "mini academic paper". Even though you will be working with more limited data than a thesis, let alone an academic article, the goal is to mimic the process. Please use the following guide for your final paper. It should consist 4 main sections. See the reading from Gopaldas (2015), related to lecture 11.

The frontend

You can change the order if you like, but qualitative research articles are in general written in this order.

- **Title of your paper:** The title should encapsulate what the paper is about, and possibly introduce your novel theoretical concept, if you have one
- **Introduction:** Begin your article with a brief description of domain, field or phenomenon that you're investigating. Explain also why it is important to study.
- **Literature review:** Conduct a literature review on the phenomenon.
- **Theoretical problem:** By elaborating on literature review, explain what literature overlooks and what the gaps are. ("Here's what we know; here's what we don't know")
- **Research question:** Restate the theoretical problem as a research question, so your research focus becomes very clear to your readers.
- **Research motivation:** Explain why your research is important in terms of theoretical and practical reasons.
- **(If applicable) Theoretical perspective:** Explain your perspective that you use to examine your theoretical problem. Why did you choose this lens for analysis?

Context and methods

This section is very important for this assignment and course overall! Here please describe in detail how your research project unfolded and how you interpreted your data. **We're particularly interested to see how your data collection & analysis journey has evolved from the individual coding to taking it to the group level and comparing codes across data sources and developing them into themes!**

- **Research context:** Describe context or real-world setting of your research and how your theoretical problem contains within this context.
  - Bring some historical perspective or contemporary market relevance!
  - Restate why this context is ideal for your particular theoretical interest
- **Data collection:** Explain how and why you collected your data. Be true to the chronology of how things unfolded! Remember to state how informants were selected, who they are, how they were interviewed, the average length of interviews and transcripts. Evaluate the representativeness of the sample vis-à-vis the context! (Are these people similar or do you have heterogeneity here, like with gender or contextual involvement?)
- **Data analysis:** Write up how you analyzed data and explain how your data analysis moved from early analysis to theme building and theorization.
  - How did the themes emerge?
  - How did you develop them?
  - How did your theme developing relate to your interviewee sample? Can you account for commonality vs. variability?
  - How did you "test" them and explore boundary conditions?

The findings

Theorizing: Introduce your themes and state your theoretical claims. The themes should be robust and clearly supported by quotes from interviews that are sufficiently unpacked and

interpreted. The themes should be robust. Finally, elaborate on how your assumptions, data and interpretations justify your claim.

The backend

Theoretical contributions: Summarize how your insights developed or contributed to the theory while answering your research question.

- How do your findings relate to prior studies?
- Do they align with, extend, or contradict findings from prior studies?
- What is the novelty of your findings, and your theorization?

Practical implications: Think about potential stakeholders (marketers, policy makers etc.) who could take action depending on your results and write up your recommendations for them.

Limitations & opportunities: Describe alternative research contexts, informant samples or theoretical perspectives that can be considered for further research.

Conclusion: Summarize the key takeaways from your research.

The assignment is **25%** is overall grade.

8. Final Reflection Paper (Individual deliverable)

Here you will reflect on your learning during the course and how your view of yourself as a qualitative research has changed. More specifically, the goal is to reflect how the learning of new tools and going through important research experiences have shaped your view of yourself. What was qualitative research like for you? Think ahead: Which qualitative method(s) do you plan to use for your master's thesis? Do you see qualitative research as a career prospect now?

Though the reflection is supposed to be personal, value is placed on correct reflection through course concepts, themes, and tools. In other words, we expect *explicit* and *competent* citing of course readings like "I found reading on concept X valuable, because…; I was surprised to learn about Y because…"). Furthermore, we expect that you cover a lot of the course topics, not just a select few favorites and highlights. The better you are able to see connections *between* course topics, the better. A critical tone and self-reflection is valued. You can go through the course chronologically, if you wish, or splitting the essay into "more important / enjoyable" vs. "less important / difficult" learnings or something similar.

It is highly recommended that you keep a learning diary or other types of notes during this course, as it will help keep track of what has been covered. It makes writing the final paper so much easier. We also encourage you to look back at your own comments from Perusall to freshen your memory.

The deliverable is a <u>maximum</u> of four pages, single spaced, 1" margins, 12-point font, Times New Roman. See full rubric on MyCourses!

Grading Rubric:

Quality of Reflection on your experience in doing qualitative research	*30%*
Recall and Critical Evaluation of Course Concepts	*50%*
Writing Quality	*20%*

The assignment is **15%** is overall grade.