



Qualitative research in marketing

Road-map for a wilderness of complexity and unpredictability

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309

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Abstract

Purpose – To discuss and analyse three themes in qualitative research in marketing which are objects of both frustration and confusion: analysis and interpretation; theory generation; and a quest for scientific pluralism and individual researcher lifestyles.

Design/methodology/approach – Underpinning the discussion is that complexity, ambiguity, fuzziness, chaos, change, uncertainty and unpredictability are characteristics of a market economy; that qualitative and subjective interpretation is necessary to add the spark of life to marketing data; and that general marketing theory needs more attention from researchers.

Practical implications – The proper use of methodology and the generation of better marketing theory will make it easier for practitioners to reach the right decisions.

Findings – Quantitative and qualitative research processes are not by nature antagonistic, although their advocates may be; quantitative methodology carries qualitative “bugs”, necessary for its sustenance.

Originality/value – The article ends with a recommendation that every researcher in marketing should design his or her individual research approach, one that suits the personality of the researcher. As an example, the author presents his own current methodology-in-use, interactive research.

Keywords Qualitative research, Marketing theory

Paper type Conceptual paper

Marketing: established – but without clout?

Let me begin with my perception of the current state of research in marketing. It can of course be argued against, but it can also be accepted as a vantage point for a scientific discourse. The purpose then is not to prove whether I am right or wrong, but to assess what value a journey from my personally chosen departure point can add to research in marketing.

Marketing is an established discipline in business schools and an established function in enterprises, where, at best it is part of the corporate culture, at worst it is encapsulated in its own silo. But has marketing indeed got any clout in the boardroom and among top management? Very often marketing seems to be reduced to customer satisfaction studies and planning. Despite confessions to customer-orientation, my feeling is that the prime time of the CEO's agenda is occupied by finance, accounting, and technology, most commonly information technology.

On the academic side Brown (1993, p. 28) laments “marketing's perennial search for academic respectability” and “the discipline's lowly standing in a scholarly caste system”; and Piercy (2002, p. 352) argues that in research in marketing “. . . there is a pathology of mediocrity and a process of trivialization . . . which threatens its scientific status, its practical importance, and its future as a major part of business-school curricula”. I too have doubts about the contribution of marketing as an academic



discipline and the way research is performed. According to Alvesson and Willmott (1996, p. 128):

... marketing is perhaps the subdiscipline of management to which critical theory (and related intellectual traditions) can contribute most, and yet it is also in this specialism that the influence of critical analysis is weakest.

Their approach is critical theory and Habermas' (1972) "illusion of pure theory", and the necessity to challenge the foundation of research and the societal consequences of its practice. A dialogue on the standing of marketing could also start with Kuhn's (1970) conflict between mainstream science and paradigm shifts; DeBono's (1971) vertical thinking versus lateral thinking; or Feyerabend's (1975) doubts about the value of scientific methods.

Saunders (1999, p. 85) succinctly expresses a solution:

Quantitative methods take marketing from an art to a science, from conjecture to rigour.

This article is inclined to argue that:

- being quantitative can contribute to raise the scientific status of marketing but is not sufficient;
- quantitative methods cannot achieve scientific excellence without a clear awareness of their qualitative dependency; and
- a merger of the best of both worlds – rather than a one-sided acquisition – will add substantial synergy to research in marketing.

This resonates the words of Van Maanen (2000, p. x):

Meaning and interpretation are required to attach significance to counts and classifications and these are fundamentally qualitative matters. The two approaches are then bound together, neither capturing truth alone nor trumping the other.

The theme of this article is qualitative methods, but seeing those as intertwined with quantitative methods; their shared ground – which is less noted than their differences – will be part of the discussion.

Several questions could be raised about research in marketing and its contribution to academe, business practice and society. Do we really come up with results of any impact? Do we offer anything novel that also has practical relevance? Do we make things happen? Do we even react when things happen or do we just follow the "research as usual" daily routine? Where were we during the dotcom craze? How many warned and asked the simple but crucial questions about what the e-shopping advocates and trend gurus were peddling when their prophecies were so blatantly inconsistent? Is our voice heard in the current recession? Is research methodology with its techniques mainly producing trivial and shallow results with little import?

This article cannot offer answers to all these questions, but it attempts to explore issues that I consider important for improving research in marketing and its relevance. From the many areas of qualitative research that could be discussed, I will limit myself to three that particularly engage my mind: analysis and interpretation; theory generation; and the individual researcher's approach to science. Each in turn will be treated in the following sections.

Analysis and interpretation

Marketing situations are not easy to grasp. It should be unnecessary to say that marketing decisions and actions are not just based on analyses of data, because data are mostly hard to find, hard to define, and they are incomplete. The reason I mention this is that there seems to be a scholarly dream that if we just do more research and collect more data (“get all the facts”) we will eliminate uncertainty and risk and make rational decisions. However, the real world does not allow this. The marketing manager entering 2003 suffered the aftermath of a brief passage of fast-growing dotcoms with skyrocketing stock prices on volatile exchanges, partly based on fraudulent information. The stock prices took a sharp dive and hit the ground. Soon after, the recently deregulated and more than 100-year-old telecommunications sector imploded and was left in severe crisis. The general economic and political climate facing the marketing manager was a long drawn-out recession; deregulation of markets turning out to be more irregular than expected; European Union expansion plans with unknown future effects on marketing; the business effects of global terrorism; and a host of other uncertainties.

Although it is tremendously important how you collect data, it is just as important what you do with the data once collected. In reports based on qualitative research, data collection is usually described, sometimes at length, whereas analysis and interpretation stand out as the Achilles’ heel. Analysis and interpretations are part and parcel of the same issue: how to make sense of data. The term “analysis” is primarily associated with techniques and research designs that are explicit and rigorous and can be replicated by others, that is primarily quantitative research. Interpretation is more linked with qualitative approaches. Its process is not as explicit, transparent and orderly as in analysis, and replication is more difficult. Hermeneutics was once the science of interpreting biblical texts. In today’s research practice, hermeneutics is a general approach to interpretation. Marketing hermeneutics is perhaps not so far from the original application, considering the shopping and consumption evangelism of the modern market economy. Interpretation is a necessity in all human effort to understand the world and specific aspects of interpretation appear in all types of research, not only in qualitative approaches as will be shown later. Hermeneutics does not offer a set of rules for the researcher; it is rather a name for a conscious search for meaning and understanding. I am, however, inspired by the work of Ödman (1985) and the guidelines he has worked out for hermeneutic research practice.

Noting that researchers in marketing have difficulties in analysing and interpreting qualitative data, I have chosen to list a series of strategies that might be helpful in research practice. These can be extracted from manuals on qualitative market research, sociology, educational science and ethnography. More books are also appearing that apply qualitative methods specifically to research in management (for example, Remenyi *et al.*, 1998; Easterby-Smith *et al.*, 2002) and in marketing (for example, Carson *et al.*, 2001). Instead of complying with the traditional article format of having a number of references to back up whatever I say, I have taken the liberty to merge literature with my own experience, and furthermore to mix philosophical issues with technical, handbook-like instructions. It is not until you have tried methods in research practice that they become a living reality.

Strategies for qualitative analysis/interpretation

In listing strategies I have not attempted to make a clear separation between analysis and interpretation as the two partly overlap:

- *Causality and understanding.* Quantitative techniques are mostly used to try to pinpoint causality, usually between two or a few variables where the independent and dependent variables are defined. Qualitative methodology is primarily directed to understanding the complex and the elusive in a systemic perspective more than to establish unambiguous cause and effect relationships between single variables. It is built on the notion that life cannot be broken down into well-defined constituent components. Reality is more than the sum of its parts; there are also synergy effects.
- *Simultaneity and data generation.* Qualitative research is characterised by data collection, analysis and interpretation in part taking place simultaneously, and tentative conclusions being drawn during fieldwork and the reading of archival records. I prefer the term data generation to data collection since data in a social environment do not consist of objects, which can be readily collected. Data are generated, meaning that they are the construction of the researcher. Even if data are taken from secondary sources such as statistical tables and annual reports, the researcher will have to assess and check their credibility, make a selection and combine them in formats chosen by the researcher, such as graphs or texts. Data are often created in interaction, for example, with a respondent in an interview. It means that even at this early stage of the empirical research, the researcher is engaged in analysis/interpretation; pure, value-free and complete description is the exception – if it exists at all.
- *Comparison.* A key to qualitative research analysis is comparison. Data are compared with data, with existing theory, and with results from previous research. This continuous comparison is part of a sense-making process where patterns are formed and turned into concepts, categories and eventually theories.
- *Condensing data.* To have access to an overwhelming richness of data is positive *per se*, but difficult when it comes to analysis. Therefore it is often said that we need to reduce data to make them manageable. The term is unfortunate as it may lure us to look for the average or the typical, thus rejecting variety and anomalies as exceptions. Instead we need to condense data, to make the same information more compact and manageable but not lose weight.
- *Transparency.* A desirable property of scholarly research is that the reader can follow the actions and thoughts of the researcher. This may seem difficult to do with ordinary verbal language where verbal trickery may blur the real insights. A consolation is that formalised mathematical language is no guarantee for objectivity, and lying with statistics is a well-known and prevalent scam. Considering the large amount of data and links between them that are common in qualitative applications, for example, in case study research, as well as the researcher's implicit paradigm, pre-understanding and tacit knowledge, it is often not possible to make all steps in the analysis transparent to the consumer of the research. This may feel uncomfortable, but is a reality that we had better learn to live with constructively rather than sweep it under the carpet. It makes it

difficult, often even irrelevant, to try to fulfil requirements for reliability and replicability which is adamant in quantitative research and experiments.

- *Techniques.* The literature on qualitative analysis offers a *smorgasbord* of techniques to structure data, such as matrices and graphs (Miles and Huberman, 1994; Yin, 1994). Strauss and Corbin (1991) offer a stepwise approach to qualitative analysis inspired by grounded theory, and books on grounded theory give instructions for analysis (Glaser, 1978). Next to being supervised by a researcher who is experienced in implementing qualitative analysis, reading other researcher's reports where the implementation of projects is accounted for is recommended. In Bryman and Burgess (1994) researchers tell how they implemented qualitative projects, and Glaser has compiled several readers of grounded theory projects (see, for example, Glaser, 1993).
- *Computer software.* Software can store data in an orderly way, provide structures and hierarchies of data, perform certain analytical tasks and respond to questions that the researcher puts to the data, thus facilitating the life of the qualitative researcher and increase research productivity (see, for example, Bazeley and Richards, 2000). Software assists, but does not take over the human researcher's role as analyst/interpreter and the need continuously to fine-tune analytical/interpretive skills. This conclusion is just as valid in quantitative research which will be explained further with the help of "The research edifice" (see Figure 1).
- *Intuitive and experiential – but systematic and rigorous.* Rigorous research techniques need to be combined with such human qualities as intuition, common sense, experience, sound judgement, wisdom, insights, tacit knowledge, empathy

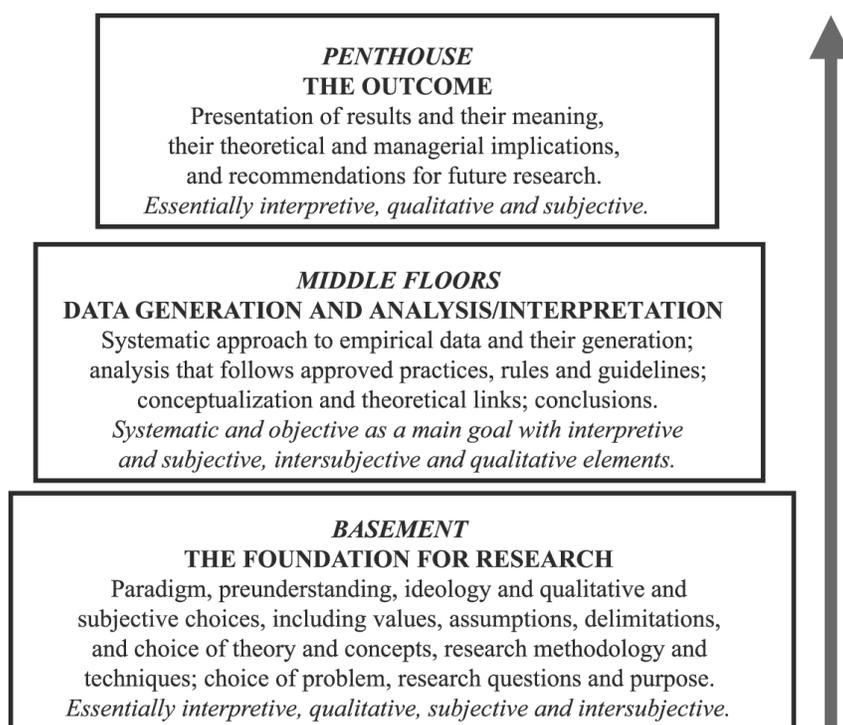


Figure 1.
The research edifice

and ethics. It is not only in exceptional cases that research can be irrelevant and erroneous and thus harmful if the human aspect is overlooked. In qualitative research the researcher remains the most important instrument and whether we acknowledge it or not, analysis/interpretation is dependent on the individual's intuition. Intuition is often scorned at as anti-science, but good intuition means that we quickly process and synthesise data and draw conclusions based on the enormous masses of data and synapses (linkages) which are stored in our brains. Intuition can of course harbour bias, but that is also true with other techniques for analysis/interpretation. In our daily efforts to get on with our lives, we keep interpreting events. What then differentiates research practice from mere personal day-to-day practice? The difference is rather a matter of degree and transparency. It is high time to merge the systematic and overt procedures of western science with the methods of handling experiences.

- *All is data.* Hermeneutics in a broad sense can be applied to all types of data. In the flow of spoken and written words and numbers, symbols, observations, feelings and thoughts, interpretation becomes an integral part of a marketer's daily life. Marketing hermeneutics can help us find meaning and it mirrors what a marketer does in his or her practice. Hermeneutics is also concerned with the interpretation of subtle expressions of human life, where the researcher tries to transform tacit knowledge into words. Nonaka and Takeuchi (1995), with reference to Japanese industry, have stressed the importance of making tacit knowledge explicit. In comparing the US and Japanese knowledge strategies, Cohen (1998) notes that the Japanese focus is on tacit knowledge and the nurturing of knowledge cultures and communities instead of as in the USA on explicit knowledge, projects and measurement. Limestone and Zhu (2000) note that the combined perspectives of the East and the West can offer insights that could not be obtained by just applying one of the perspectives. Both perspectives are necessary to address the variety and complexity of systems such as corporations and marketing networks. By not only merging western science with western common sense, but also with eastern philosophy we can arrive at a higher state of knowledge than by just applying either of these.
- *The hidden agenda.* All research builds in part on assumptions and restrictions that established researchers share – intersubjectively, not objectively – through tradition or agreement. In the extension of interpretation, hermeneutic processes also embrace the researcher's paradigm, pre-understanding, understanding and contributions to explanation. Pre-understanding is what we know about the phenomenon of study when we start out on a research expedition; understanding is the (hopefully) improved knowledge that we come up with as a result of the research. Explanation is usually claimed to require unambiguous cause and effect relationships established through numbers, but as business life is in many ways ambiguous, less definitive and more transient explanations are required in practice.
- *The hermeneutic helix.* This is an expansion of the hermeneutic circle; the helix version bringing more dimensions in focus. Going from a circle to a helix we introduce advancement, moving research frontiers upwards, not just staying on the same level. We move from pre-understanding to understanding on a higher

level; we move from parts to the whole and to parts again, but now with greater understanding; and we move back and forth between the substantive, specific level to the abstract and general level, each time stretching ourselves along the helix. There is thus interaction between what we knew and what we have just learned, between slices of data and a systemic whole, and the concrete and the abstract. We can only give meaning to parts if we can put them in a context, a theory. We interpret and re-interpret data in a continuous trial-and-error process of both theory generation and theory testing. Through this process, qualitative research is not just left to generate theory, but it also tests theory in the sense of constantly improving its validity.

- *Evaluation of sources.* Researchers in marketing should be more critical to data and their sources – but in a constructive spirit. Newspapers and gossip are unreliable sources that need to be double-checked, we are aware of that. It seems to be less understood that official statistics can be a pack of lies, defined for a specific political or business purpose and compiled under a series of assumptions that are not known to the user of the statistics. Interviews with CEOs, marketing directors, consultants and politicians are often misleading, as they are speaking for their sake. Annual reports and accounts as well as statements from financial analysts can be outright deception, not just in such spectacular cases as in 2002 in Enron, Arthur Andersen and many other companies throughout the world. The dazzling elegance of statistics and the equally dazzling eloquence of words can communicate almost anything that has been asked for by a client, a political party or a company. Without sound judgement and ethics, the rigour and systematic modus operandi of researchers, does not become knowledge but ignorance, albeit rigorous and systematic ignorance.
- *Full report.* Data should be accounted for in a transparent, thick, rich and complete way and contradictory data must not be left out. This strategy takes readers closer to reality, but a mere detailed description is not sufficient; the account must offer conceptualisation and condensation or the researcher has not contributed interpretation and meaning.
- *Alternative interpretations.* To increase credibility, the researcher should offer possible alternative interpretations and argue both for and against them. As marketing reality is often complex, there is a shortage of simple cause and effect explanation between well-defined independent and dependent variables; there are multiple, sometimes innumerable, possibilities. When causal explanations are straightforward, however, they should be dealt with accordingly.
- *Privileged bias.* Two privileges influence interpretation. One is the privilege to define the problem to be researched. In an ideal and free academy this should be the privilege of anyone, but in reality a PhD candidate is dependent on the preferences of the supervising professor and the research culture of a university department. The professor in turn is dependent on the preferences of evaluation and grant committees, companies and governments that control the money. The other is the privilege to interpret the research. Who draws the conclusions and who has the credibility or power to endorse a certain interpretation and publish it?

Enter the research edifice

“The research edifice” in Figure 1 structures analytical/interpretive and objective/subjective phases, underscoring the omnipresence of the qualitative in research and the dependency of quantitative research on qualitative features. The qualitative bug is there; in fact, you do not have much choice as there is no pesticide to kill it without serious side-effects. It is a benign bug though, and you will find it to be a necessary part of the ecology of social life – once you accept it on its own terms and do not see it as a threat. Let’s sneak into the building through the basement.

The basement. All research starts with a foundation of the researcher’s paradigm and pre-understanding. Here we make a mix of subjective, intersubjective and objective choices and assumptions such as what to research, which research questions to ask, how to find an answer, and in marketing that a market economy is better than a planned economy and that competition spawns innovation, productivity and low prices. These are mainly qualitative assumptions representing our interpretation of the world. They can be very personal but also be embedded in a specific research culture and discipline and be influenced by objective knowledge.

The middle floors. If we press the lift button to the middle floors of the research edifice, we find ourselves confronted with data generation and analysis/interpretation.

If the researcher chooses to do a quantitative study, a goal is to be explicitly systematic and rigorous, with little subjective influence on the research by the individual researcher or the team. Accompanying this process are, however, both intersubjectively agreed assumptions and choices, and subjective judgement call. On these floors, data should also be conceptualised and compared to theory and other research. If the goal is theory generation, the researcher has to conceptualise the data and compare them with extant models and theory, or they remain mere description leaving the finishing interpretive touch to the reader and listener.

If it is a quantitative survey the questionnaire and its scales, response alternatives, sample, the collection of incoming questionnaires, and the registration and analysis of data can be rigorously handled, but still give rise to judgement calls and interpretation. One example of pseudo-objectivity in data generation and analysis is offered by surveys in which questionnaires are sent to businesses to find out, for example, how their marketing planning is done, how their customer relationship management (CRM) systems are working, how their key account managers operate, or what product or service development they will offer in the future. A lower and lower response rate of 10 per cent or even less is currently considered adequate – but only intersubjectively, not objectively. The resulting slices of data are accepted as amenable to statistical treatment. The explanation for accepting low response rates is that:

- it is difficult to get businesses to reply; and
- if you send out enough questionnaires you get a lot of data to process anyway; and that there is (after some additional checks) nothing to indicate that the data are skewed and not representative of the studied population.

If instead qualitative case study research is performed, there will usually be little numbers and statistical conjecture (note, though, that case study research does not exclude quantitative elements). By doing case studies and applying various data generating techniques – all the way from reading texts to in-depth interviews, ethnographic observation and action research – complex and ambiguous issues can be

penetrated. The rigour may not be as obvious as with quantitative methods but it can still be substantial. However, this kind of research would require much more personal and subjective interpretation of data, a necessity in order to attract and accept the wealth of data that complex, chaotic and unpredictable markets offer.

The penthouse. The last stop is the top floor, the penthouse. We are now as close to the sky as we can get in research. Here the research data, results and conclusions are presented, traditionally in written, oral and visual form. Even if it is pure academic research and the focus is on balanced and reflective conclusions, it might also include more speculative, innovative results. If the research is focused on practical action, the researcher could make recommendations and then those concerned have to make decisions, execute decisions, monitor the outcome, and make amendments. Whether the research is aimed to theory generation or to consulting to help solve a specific problem, interpretation is required. There were no simple, exclusively objective formulas to be found in the basement, and the dilemma returns in the penthouse. In fact, the results from our current research should ideally contribute to a more solid foundation of the research edifice and become part of the basement of future research.

In summary, Figure 1 shows that the totally systematic and objective pursuit of the truth is a myth. The systematic and objective part is only a fraction of the research, albeit sometimes a pivotal fraction. In this sense it is immaterial whether research is qualitative or quantitative.

Generation of marketing theory

Four observations in particular have prompted me to bring theory generation into focus. First, theory generation is more often the outcome of a conceptual and qualitative process, whereas theory testing is more associated with empirical, quantitative hypotheses testing. Strange as it is to me, hypotheses testing has been placed on the highest level of scientific excellence in social sciences, including academic work in marketing. Second, researchers in marketing seem to settle for theory on a low level of abstraction or generality and have difficulties seeing the broader, systemic context; the core of a phenomenon is obscured by details and fragments. Third, researchers seem to get stuck in the middle, neither being firmly based in real world data, nor reaching a sufficient level of abstraction. Fourth, researchers are also stuck in the past and an unwarranted notion that theory advancement is a cumulative process.

Marketing theory must reinvent itself and be refined, redefined, generated, and regenerated – or it will inevitably degenerate. Much of marketing knowledge resists time and change and should be retained; much is obsolete or was never up to par and should be dumped, and much is not yet discovered. This is in line with Kuhn's (1970, p. 169) statement that new paradigms "usually preserve a great deal of the most concrete parts of past achievement and they always permit additional concrete problem-solutions besides". This, however, is misunderstood by many. A paradigm shift, even if the new paradigm includes elements from the past, is not an incremental change based on the bulk of previous literature; it is a new foundation.

It is the job of the scholar to separate the chaff from the wheat and not keep the established or accept the new just because it appears in certain journals or comes from the writings of currently popular "masters". Even if the new is contrary to our beliefs, vested careers and interests, and poses a threat and initial frustration, we should receive a paradigm shift with enthusiasm rather than with apprehension. Schumpeter's

(1950) famous demand for creative destruction through innovation seems universal and applicable to marketing theory, too.

My general stance is that theory in marketing is not really developing beyond conventional concepts, piecemeal models, current events and success stories (Gummesson, 2002a). The outcome is a world of “textbook theory“ that is taught in business schools. Textbooks are too quick to jump on the hype, for example dotcom, e-shopping, and software-based CRM. They are too slow to merge – not just list or add in a paragraph or note – fundamental, long-term developments, for example, services marketing, business-to-business (B2B) marketing, and the philosophy of relationship marketing, with already existing marketing management knowledge.

Research in marketing is often limited to collecting standardised data on consumers, competitors and others without getting beyond statistical or verbal description. To earn the label “marketing intelligence” the research must include informed interpretation, conceptualisation and theory generation. To me it stands out as increasingly important that researchers help to interpret what is happening in the market and in the application of marketing strategy, not least in today’s high-velocity economy. Marketing metrics with relevant indicators can assist, but they are primarily historical and rarely self-sufficient and future-oriented. Their predictive capacity rests on certain assumptions, and qualitative interpretation is indispensable. We need theory to condense reality to something comprehensible so that we can adapt and manage. That is what theory does – when it is good.

I should like to draw special attention to two key issues here: conceptualisation and contextualisation. They are interwoven and stress different aspects of theory generation. Concepts are needed, and in times of major changes new concepts – reconceptualisation – are urgently needed. There is a common mix-up between the term, which is a label, and a concept, which is an idea and the content behind the façade provided by the label. This mix-up is referred to as reification, mistaking the representation of an object for the object itself. Re-labelling is not the same as re-conceptualisation although branding and re-branding are used in marketing to create perceptions among customers about the content of a product or service, sometimes linked to improvements, but sometimes without altering the content. A postmodern marketer, though, may claim that the customer’s perception of the brand is the reality and that the real reality is unreal.

An old term in marketing theory gives the reader associations to the old, even if the content is revised or new. For example, to understand services it is not sufficient to compare it to goods, which has so far been common (Lovelock and Gummesson, 2004). Services are treated with the use of goods terminology, and are defined in comparison with goods. This does not give room for understanding services on their own premises. It turns out, however, that it can be difficult to introduce a new term to represent a new concept and it seems quite accidental if the term is accepted or not.

Contextualisation refers to the need to place single data in a broader context, that is, generate theory. Theory orders data in a context. A theory is a roadmap and a good roadmap makes it possible to navigate in a territory that is unknown to the traveller. When conceptualisation has taken place but not been extended enough to provide a context, bits and pieces of knowledge risk to be misunderstood and misused. Customers do not live isolated lives and consume one service or product at a time as if these were stand-alones. Customers live in a context. They consume a mix of many

goods and services in all sorts of combinations. If I am treated well in a store I am likely to go back. If the taxi driver to the hotel was unpleasant, I will be in a bad mood entering the hotel and that will affect my behaviour and my perception of the hotel.

Theory generation, moving from raw data and description to conceptualisation and contextualisation, may be the most valuable contribution a scholar can offer. As researchers in marketing we are rarely if ever innovators; we rather start out as observers and messengers. However, it is not enough to be reporters of events. We have to add value to the phenomena we present; that is what scholarship is all about. One of Glaser's (2001) latest books is specifically concerned with the move from description to conceptualisation.

The further discourse is linked to Figure 2, a structure of the route from mere description to conceptualisation, from slices of raw substantive data to contexts of increasingly abstract, formal and general theory. The ensuing text will take the reader through the figure.

The general framework of the figure starts at the bottom with real world data and a process to generate substantive, specific theories within a limit area of application. In the next phase, these areas are synthesised to a higher level of abstraction and theory of more general application is tentatively formed. The generated theory is compared with other theories that the researcher considers have an affinity or can add a contribution. The process goes on in alignment with the hermeneutic helix towards higher abstraction and generality.

For the purpose of illustration, the general framework is clad in my own research in marketing, where the heavy parts are marketing management with services marketing and relationship marketing/CRM at its core, and with input from other relevant research. It starts with service research based on data from different service areas. The data are categorised and conceptualised, forming the beginnings of specific theories: a theory for the marketing of professional services, another for e-services, and so on. These theories in turn are merged into a general theory of services marketing, which later becomes one of several inputs to a theory of relationship marketing/CRM. This is en route to a general theory of marketing and a theory of management. However, the journey as such may be the significant result as long as the journey is guided by vision and commitment.

To add to the realism of research, many iterations in the spirit of the hermeneutic helix may be required. If you start inductively with the raw real world data and move on the way up to becoming more general, you will have to dive down again to connect with the descriptive level. There is an ever-present risk that pre-defined categories may not be adequate because they are not properly grounded in the real world and thus are not a valid representation of the studied phenomena.

If you start on the abstract level, you have no lifeline to the ground. Soon you hover freely in thinner and thinner air. Unfortunately, when theories are not well grounded, going back and test is not enough; because of the preconceived hypotheses, concepts and categories the test may just become a self-fulfilling prophecy.

Is research in marketing really climbing a generality ladder, or does it stay put on the substantive level? Maybe not even that. Because of too superficial contact with reality, it may just stay put on a medium conceptual level with little contact upwards and little contact downwards. What is called marketing management today has its origin in consumer goods marketing of packaged mass products in the USA. It moved up from

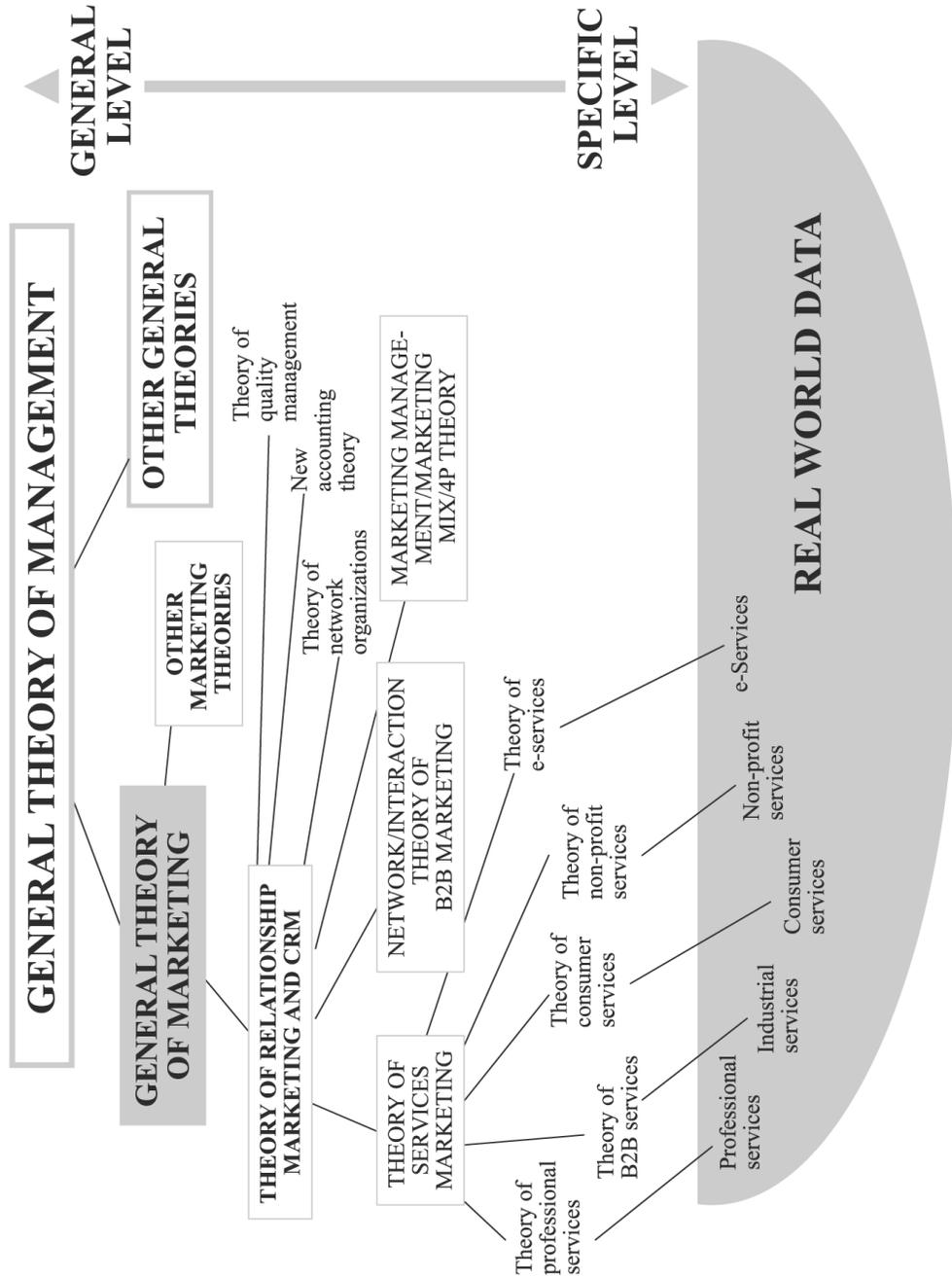


Figure 2.
The route from specific
description to increasingly
general theory

substantive data to a certain level of abstraction and claimed to be general marketing theory. From that point it tried to force, for example, services and B2B marketing into its theory, thus missing the substance of these areas. When services marketing and B2B marketing through research based on real world data, extracted relationships, networks and interaction as core variables, these areas were marked as special cases, despite the fact that they constitute the bulk of all marketing. Later relationship marketing and CRM were labelled a special case, whereas in my view they offer a paradigm shift (Gummesson, 2002b).

By generating theory continuously and following the format of the hermeneutic helix there is no strict distinction between generating and testing theory. If the researcher is guided by a desire to understand more and improve theory continuously, the never-ending journey becomes a continuous test of ever-tentative theory.

Invitation to scientific pluralism and individual methodologies-in-use

In my view, no one could ever claim that he or she has found the golden key to knowledge and science. They are elusive phenomena. We have to respect that; that is their karma and lifestyle. We are therefore in an eternal dilemma, constantly having to ask the questions: What do we really know? What is it worth? How do we get to know more? This ongoing journey is a fascinating treasure hunt for many but for others it is the avoidance or assassination – a scary monster. We probably all would like law and order and simplicity and security. To get that, however, we will have to do away with the magic of life and convert science to a set of regulations. In the process we restrict the scientist – the discoverer and entrepreneur – to a controlled and manageable bureaucrat heeding pre-set routines. But new knowledge should not be a threat even if it temporarily might shatter our careers, received theories and beliefs.

The genes of researchers differ and so do researcher experiences, incentives and motives. This variety of researcher personalities offers science a disparate army of two-legged, individual paradigms. To me this is preferable to what I perceive as progressively stronger power demonstrations from established mainstream professors, promotion and grant committees, quality and ranking agencies to beget a centipede paradigm where all 100 feet march in the same direction. With a pluralistic strategy we will develop a diverse community of individual “knowers”, offering a medley of “processes of knowing” and consequently a variety in what is “known” (to use the Samitha concepts from the ancient Vedic culture; see Gustavsson (2003) and Zhu (2003)). In my view, pluralism is the only way to keep science alert, innovative and entrepreneurial. In marketing terms, it is the same as saying that a free market of science is likely to function better than a planned command economy.

Interactive research: a two-legged paradigm illustration

Here is an example of my personal choice of methodology – a two-legged paradigm. It is an example and not the doctor’s orders; use it if you find it appealing or compose your own methodological symphony (for a fuller account, see Gummesson (2001)).

My experience of marketing and research is derived from a wide range of roles: being an around-the-clock consumer in a commerce-centric society; doing scholarly research and reading that of others; doing market research for companies as a consultant; designing and implementing marketing strategy; being a buyer of market research data and strategy advice from consultants; using market research data as

input to decisions and action; and seeing how market research enters management processes, not seldom as part of internal politics rather than for rational decision making, planning and action.

From these experiences I have arrived at a synthesis of research that I have found to be meaningful for me. I have chosen the label interactive research for my current methodology-in-use, the reason being that interaction has stood out as its core variable. Progressively my mindset has adopted a view that life, including both marketing methodology and theory, can be seen as networks of relationships within which interaction takes place. Instead of searching for strict and partial causality, I search for the understanding of a systemic whole, a context, with individual and complex patterns of interactive relationships. Important guidelines throughout my research are close access to reality – which requires researcher involvement – and validity of results.

Interactive research embraces five components, which will be briefly reviewed in the next paragraphs.

Case study research. This is my overarching approach. In case study research one or several cases are used to arrive at specific or general conclusions about certain phenomena, recognising the multitude of variables, complex interrelations and ambiguities of business life. Case study research provides the researcher with an input of real world data from which concepts can be formed and propositions and theory can be tried. A case study could be primarily inductive where the case provides data for conceptualisation and theory generation, or primarily deductive where cases are used to test existing theory. Case study research is systemic and holistic, aimed to give full and rich accounts of the relationships and interactions between a host of events and factors. It becomes largely interpretive.

Quality criteria for quantitative studies, such as reliability and representativeness, cannot in general be applied to case study research. For example, a general rule for the number of cases needed to draw conclusions cannot be set up. The sample is theoretical and purposeful, looking for cases that give maximum information, and preferably be guided by saturation, the point where no or little new information is added. A single case study of a successful launch of new technology not only helps us understand the specific case, but also can teach us general lessons about marketing. For an extensive checklist of quality criteria for case study research, see Gummesson (2000, pp. 185-8).

Inductive research and grounded theory. Simply put, inductive research lets reality tell its story on its own terms and not on the terms of extant theory. I have found inductive, empirical research a great source of inspiration, especially the strategies of grounded theory as developed by Glaser and Strauss (see Glaser, 1978, 2001; Locke, 2001). Grounded theory strives to be realistic and valid. To start a theory generating research project by first designing clear-cut categories and criteria in a complex and dynamic domain like marketing can severely impede our perception. But isn't the researcher's paradigm and pre-understanding – the basement of the research edifice – the capital of the professional's work? It may seem odd to ignore existing knowledge to be able to receive new knowledge; we are used to hear that knowledge is cumulative and that what we do must have support in previously published journal articles. Viewing all knowledge as tentative, however, researchers have to train themselves to listen to reality without preconceived ideas. At a later phase the results can be

compared with existing concepts and theory and will thus proceed as an interplay between the inductive and the deductive.

Grounded theory concepts and guidelines are clearly underused in marketing. All are not necessarily unique but they have been coherently ordered and reached a high degree of completeness in combining theoretical sensitivity, memos, comparative analysis, theoretical sampling, saturation, open and selective coding, the identification of core variables, and the generation of specific and general theory.

Marketing anthropology. The prevailing qualitative research strategy in marketing is verbal data from personal interviews and surveys. In anthropology/ethnography data are generated through direct or participant observation, supplemented by interviews and conversations. The research is systematic and in-depth, documented not only in field-notes, but also in photos, films, audiotapes and artefacts. To make anthropology operational in a business setting, an adapted variant could be called corporate anthropology, or for marketing-specific applications marketing anthropology. Characteristic of true anthropology is the long periods over which a culture is studied – several months or years – as compared to the minutes or hours allocated to interviews and self-administered questionnaires. When a company and market is local and accessible, the researcher can be reasonably present and register what happens. Companies that operate in many locations and time zones require careful selection of the points of observation. Their marketing and sales staff is more often on the road or in the air, in hotels, and at their client's premises, than they are at their home base. In consumer research – for example, to find out how people really eat breakfast or watch television – the true and complete behaviour can only be observed by being there, or let cameras act as “spies”.

Marketing action research. In a job we get professional experience, perhaps 40 hours a week. As consumers we live in a marketing laboratory 24 hours a day. Action research entails dialogue and reflection based on data from experience through active involvement in the process being studied. It is akin to introspection found in postmodern consumer research and self-ethnography is an introspective and reflective extension of participant observation, but its scope is broader. We are actors, we make decisions and we have to face the real life consequences. But data formed through experience are sparsely used as empirical input in research, mainly because the method is unknown or off putting to the conventional researcher who favours detached research and is suspicious of subjective data. Action research gives rise to reflection, an inner dialogue. To paraphrase terminology from CRM: through systematic research based on personal experiences we can build data warehouses and models for future datamining. Involvement gives better access to data than detached research. To claim that involvement and the use of the researcher's personality and subjectivity makes the researcher corrupted by the phenomenon under study and thus biased, and that the detached researcher is objective and uncorrupted, is no more than a subjective assumption. The scientific quality of subjective reflection and introspection is dependent on the researcher's personal maturity and professional skills. The experience of a single researcher, however reflective and introspective that person may be, is usually not sufficient, although it has the advantage of datamining from close access. Data could be mined parallel to a dialogue with others and their experiences.

The term action research is reserved for situations when researchers assume the role of change agents of the processes and events they are simultaneously studying.

We have that role both as consumers and when working in organizations. Management action research is an application to the study of business phenomena, and a subdiscipline could be named marketing action research. The action researcher does scholarly research and is both an academic researcher and either a marketing practitioner or an external consultant. His or her purpose is twofold: to contribute to science and to help solve a practical problem. By being involved, the object of study creeps under the skin of the researcher in a way that is not possible in the study of documents or in interviews, even in participant observation. The access is as close as can be, and tacit and embedded knowledge can be uncovered.

Further discussion on action research applied to management and marketing is found in Gummesson (2000), Coghlan and Brannick (2001), and a special issue of *European Journal of Marketing* (Perry, 2004); and for a review of introspection research, see Wallendorf and Brucks (1993).

Narrative research. Narrative research is concerned with the ways "... in which social actors produce, represent and contextualise experiences through narratives" (Coffey and Atkinson, 1996, p. 54). Narratives are accounts – stories – about experiences, and they can take many forms. There is usually an initial state of affairs, then actions and events occur and there is perhaps a plot, and there is an end, at least a temporary end and more rarely the definitive "and they lived happily ever after". Narratives can be chronological but can also weave a web of events around various themes or concepts: story-telling. If marketing anthropology could be documentary that intimately reveals decisions, conflicts and actions – we even find this as entertainment in soap operas these days – narrative research is more of an epic film.

By presenting research as a story, we avoid the fragmentation that is inevitable when we break down networks of events into abstract concepts and categories. Minett (2002) consults with B2B companies using cases of successful marketing to communicate with the general public and specific trades through the media, but also to help a selling company better understand its marketing. These stories must be told in a readable and condensed way or they will not get published, nor get read by practitioners. They become story-telling and an informed interpretation of reality, but not fiction. Story-telling in the research sense has close affinity to investigative journalism but with proper research and efforts to pin-point the essentials of reality, it becomes both a marketing tool and an input to general understanding of marketing. From a scholarly perspective such stories must of course be critically scrutinised as they are published in a company's self-interest. But so must interviews and other data, not least official statistics, provided to researchers from companies or governments.

Summing up

Interactive research represents various interactions, such as between the researcher and the object of study and its actors; between your consciousness and qualities of your inner self; between substantive data and general concepts; between the parts and the whole; between words, numbers, body language and tacit language; between the researcher and audiences; and between data, analysis, interpretation and conclusions. The elements of interactive research all strive to reach a high level of validity.

Interactive research perhaps only operationalises the best of common sense and sound judgement, adding a more systematic and transparent quality to everyday experience. It encompasses a string of strategies that are less recognised

internationally in business schools although they are well established in social sciences. Especially case study research and grounded theory are frequently used in Northern Europe within an eclectic Nordic School tradition, where syntheses from marketing and management disciplines are reflected in theory generating efforts in services marketing, B2B marketing and relationship marketing as illustrated in Figure 2 (see also Grönroos, 2000).

It is easy to criticise this personal package of methods – especially if the criticism deploys criteria from a quantitative paradigm. Case study research is called anecdotal evidence as it does not build on randomised samples; inductive, grounded theory research has no support in previous, accumulated research; action research and anthropology/ethnography are subjective and biased because of the individual researcher's involvement; and narrative research is journalism or novel-writing. However, there is no need for the qualitative researchers to worry and feel forced to justify their research against a norm that has been set up by quantitative research; criticism can be raised against all methods and techniques. The crucial directive is awareness of strengths, weaknesses and relevance of what the researcher does.

This has been an invitation to each individual researcher, research team and marketing department in business schools to consider multiple research paradigms. To use marketing as a metaphor for research in marketing; allow a market economy in research in marketing – a two-legged paradigm – and do not force on its members a planned economy – the centipede paradigm – with its standardisation and bureaucracy.

In conclusion

If we want marketing to be a productive and honourable discipline within management, both from a scholarly, practitioner and societal point-of-view, we need to use all our senses including both cognitive and emotional abilities. If we philosophically accept that there is a marketing reality, we will have to adjust our methods to understanding this reality as best we can. What we cannot afford to do is to say that the reality does not fit the mainstream paradigm and its techniques. All reality is amenable to scientific research and all efforts to focus just on a limited number of researcher-friendly issues will impede the development and usefulness of research in marketing. True scholarship in marketing is engendered by a committed entrepreneurial researcher spirit.

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