

MARKETING RESEARCH

Planning, Process, Practice

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To those who made it possible for me to share with others that which I have learned.

Riccardo Benzo

To my lovely son, Fares, and my husband and soulmate, Mohammed, for your patience and precious support. To my parents for their unfaltering love and presence. To my baby who had to bear a lot with me.

Marwa G. Mohsen

To Zaki and the future generations he represents, with hope that they will work together to create a better future.

Chahid Fourali



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CHAPTER 2

Identifying Marketing-Related (Business) Issues

LEARNING OBJECTIVES

The key learning objectives of this chapter are:

1. To select a suitable topic for marketing research
2. To explain the link between management formulation and actionable research
3. To prepare a rationale for a marketing research proposal
4. To outline the systematic process of marketing research

KEY CONCEPTS

By the end of this chapter, the reader should be familiar with the following concepts:

1. Choosing suitable research topics
2. Environmental analysis and marketing research
3. Generating viable research ideas
4. Key components of a research plan
5. A research proposal versus a marketing research brief
6. Linking data collection with data analysis
7. From proposals to full-scale projects

Riccardo Benzo

Introduction

The way in which we understand the business environment around us and how organisations operate within it is likely to influence the direction of marketing research. All the things that attract our attention are worth reflecting on and, possibly, investigating; however, we need to come up with suitable strategies to decide what to pursue and how to learn more about such matters. It would be presumptuous to think we know all that we need to, and it would be unwise to think that we can make sense of complexity without appropriate thinking and planning. The success of any research assignment is therefore dependent on the effort one puts into identifying researchable marketing-related business issues. These typically take the shape of research questions for which answers can be found within the constraints set by a company or by an academic institution.

This chapter aims to give a balanced view of how to define a marketing research issue, problem, phenomenon, trend, and so on, of interest and make it researchable. It is about keeping things in check as we strive to develop a suitable, systematic process for marketing research from its initial definition to secondary research and, if needed, from secondary research to primary research – the collection and analysis of fresh data for a specific purpose.

Based on our experience, the main reason why students fail in their marketing research endeavours is because of poor organisational and planning skills. The relative lack of knowledge of the methods and techniques required to gather, understand and interpret data can be overcome as these can easily be learned once they have been identified. With this in mind, the goal here is to break down the initial steps of the systematic process of enquiry that is marketing research. As such, we propose to start by looking into the business environment as a possible source of inspiration for investigation: marketing professionals and students should work to get to grips with identifying issues, solving problems, understanding phenomena, taking advantage of opportunities and fending off threats, which can be identified in the world out there.

As we proceed, we should aim to shed light on the type and extent of secondary research needed to frame a piece of marketing research or to address a particular assignment. This is because investing in the early stages of a research task tends to pay off handsome dividends by the end of it.

Snapshot: Yo! Sushi

With 91 restaurants worldwide, Yo! Sushi made the logical step of speeding up its international expansion by accepting an offer from Mayfair Equity Partners, giving the business a further boost on its way to bigger and better things. The chain was founded in the UK in 1997 where it still has the majority of its interests; however, it has moved into the USA, Ireland, Denmark, Norway, the United Arab Emirates and Saudi Arabia, where it either owns or franchises a small number of restaurants.

'Kaiten' (conveyor belt) sushi restaurants have proved rather successful outside of Japan where, from around 2012, they had in contrast begun experiencing tougher times. The evolution of the format has seen the introduction of more technology, with touchscreens to order a wide array of dishes and a single-track delivery system to get the food to customers quickly in a futuristic setting. The conveyor belt is disappearing as it requires larger physical spaces, which can be expensive in inner-city locations

and lead to food wastage – dishes go around the conveyor belt and eventually have to be thrown away. As some parts of the world get introduced to 'kaiten' sushi, its homeland is seeing what might be the beginning of a (food) revolution.

As internationalisation goes, Yo! Sushi does not appear to have followed a classical path from a domestic market unable to sustain its growth to a close foreign market with further opportunity for expansion. It has perhaps taken advantage of the possibility to present itself within its network of contacts. Yet, it seems plausible to argue that the company wants 'to play active roles in local markets, but also globally, as new opportunities scattered around the world can be sensed and exploited' (Carrizo Moreira, 2009: 25). In so doing, Yo! Sushi faces a number of questions relating to making decisions with regards to marketing strategy and management.

The chain already has plans for more short-term openings in the USA, yet the recent injection of funds will no doubt trigger further business activity beyond this.

Choosing a Topic

It is only natural for students to struggle during their early attempts at dealing with the first step of a research project: choosing a topic. This is because we have a tendency to start writing without realising that a carefully argued topic of research will have a much better chance of standing up to the scrutiny of our lecturers and colleagues. It is all too often assumed that adjustments can be made later on in order to create compelling new knowledge that answers a particular research question. However, keeping a marketing research project moving forward is a function of the many decisions one has made along the way. Every rushed or unsupported choice takes us away from our main purpose, because there is a higher probability that the findings will eventually be invalid and/or unreliable.

In this respect, the relationship between us and our surroundings can be seen as a stepping stone in helping define a suitable topic for marketing research. The way we sense the world in which we live has a strong influence on how we learn about it; this eventually provides a wealth of knowledge and wisdom in order for us to define potential directions for the development of our research. Experiences, expertise, culture, personal and family life cycle are some of the factors that shape who we are and how we think about what is going on around us. Drawing inspiration from our backgrounds can lead to the discovery of general areas of interest from which to select topics for research. However, our values and passions can also introduce bias in the way we execute research, so we should always be careful that our views do not intercept the systematic process of marketing research. This is how we add valid and reliable knowledge to what is already known about marketing as a discipline by and large (see Chapter 4 for further details).

As a student, you must be able to discern between a topic that has potential and a topic that does not. The process of marketing research must be, to a great extent, about being able to support our ideas right from the start using empirical and theoretical evidence along the way. Everything we know comes from somewhere and enables us to put emphasis on an issue, problem, opportunity or phenomenon that is specific enough to be researchable.

What About Your Career Prospects?

If you are nearing the end of your undergraduate or postgraduate programme, you may soon have to choose a marketing-related research topic for your final project. This piece of

work is extremely important in determining the final outcome of your studies and, possibly, your future career prospects. Several higher education institutions around the world miss the importance of putting enough emphasis on this last fact. This is why students take a rather mechanical approach to such larger-scale tasks, thus foregoing the opportunity to think deeper, focus their interests and specialise in a particular topic. They often seek to achieve a mere pass mark or to get this final hurdle out of the way, only to find themselves aimless in the pursuit of their next step, for example finding a job or getting a promotion.

There is merit in looking at alternative careers in marketing (see Chapter 1 for some examples), as the obvious choices, such as marketing communications, may be the road most travelled by tomorrow's graduates. Adding value to a degree through a more targeted dissertation is generally a sensible idea. This can be achieved by focusing on:

- particular areas of knowledge needed to pursue a specific path
- attractive (this could mean fast-growing) industries or sectors
- outstanding organisations with appealing marketing orientations.

Learning about something closely is an excellent way to improve your chances of being shortlisted for a job interview and to keep part of the selection process focused on something you are familiar with. The key advice is: avoid illogical and insignificant questions! Reflecting carefully on a dissertation topic can bring who we are and what we know to bear in a powerful way: it is the convergence of the past, the present and the future – something that should not be underplayed.

Ethics: Stage-Specific Ethical Issues

There is a general tendency to let considerations about ethics in research take a back seat; Hunt, Chonko and Wilcox (1984) state that 'Most of the ethics research pertains to the duties of researchers toward respondents and clients'. Indeed, in the past emphasis was mainly put on detailing the responsibilities of researchers. Little attention was paid to power relationships and the need to balance the interests of different groups. This is why more should be done to establish clear rules of engagement early on during a marketing research project.

For instance, students should not be forced into researching a topic in which they are not interested or that does not satisfy the assessment requirements of a particular module. It is important for researchers to take ownership of a project in full, i.e. to have the ability to 'call the shots' and define the boundaries of each and every relationship, so that they are guaranteed protection against stress, harm, discomfort, and so on, as much as any other stakeholder. In so doing, the researcher is free of coercion, the organisation or higher education institution gets meaningful research, and stakeholders obtain quality research based on the application of sound, systematic research principles.

The Business Environment

The choices we make as students or professionals should be dictated by a thorough understanding of the business environment in which we study or work. There is often a tendency to think loosely about a particular situation as being relevant and worthy of our consideration and time because of personal interest. We should try and reflect on why a particular topic

has become relevant to us, to our organisation or society at large. What kind of evolution in the business environment have we been witnessing? This is a solid way to build a compelling basis for one's research. To this extent, it makes sense to review key tools for analysis first, as depicted in Figure 2.1.



Figure 2.1 Environmental analysis in marketing research

Macro-environmental scanning originated in the second half of the 1960s. Although there are now several different acronyms to define it, the fundamental idea of a PESTLE is to offer a synthetic system to break down and list out uncontrollable factors that shape the way in which organisations do business. It starts by providing a list of important areas for observation – Political, Economic, Social, Technological, Legal and Environmental – and a structure to describe them in more detail according to the impact they may have on a firm. Using this kind of approach, a student can highlight the potential issues, problems and phenomena worth studying. This is the case for many laws coming into existence around the world, such as Australia's SPAM Act 2003, for how they eventually force changes to best practice in marketing and what this means for an industry, sector or company. In this respect, useful research could be conducted in a number of areas, including compliance, consumer perception and marketing communications.

The **business environment** includes internal and external factors that impact on how a company operates (does marketing)

As an example, Ugg, the world-renowned Australian sheepskin footwear manufacturer, had to contend with greater restrictions impacting their ability to do e-marketing within the afore-mentioned regulatory framework. These changes also shaped consumer perceptions – these can be thought of as the mental boundaries of acceptable practices – thus affecting the extent of eventual complaints, i.e. what was acceptable or otherwise. In other words, a researcher could dwell on how an organisation should adapt its marketing messages and techniques in order not to fall foul of the law and, equally importantly, not to alienate consumers. Such an investigation could eventually lead to the collection of qualitative data via expert interviews and ethnographic research (see Chapter 8 for further detail).

Further ideas for research assignments and projects typically originate from the intensity and the characteristics of the competitive environment that surrounds us (the micro environment); it is a given that companies have to contend with marketing strategies and tactics as put in place by their rivals. In this respect, marketing research can be driven by how decisions taken by businesses, with regards to innovation and product development, revenue generation and pricing, customer satisfaction and people (internal and external synergies), may influence their competitors.

Due to the seemingly unstoppable technological revolution and evolution of the last ten years, content marketing has grown massively in importance. The performance of organisations in this area is in fact in the public domain, so an analysis of practices in this field can prove useful in order to realise the effectiveness of particular programmes or activities within a small competitive set, for instance boutique hotels in the Bahamas. Such effectiveness can be measured in terms of the overall coverage in social media, the reach via influencers, the popularity of pages, the traffic generated, and so on. There is indeed a lot of scope in benchmarking others, studying industries, sectors and individual organisations, as much of what we do in marketing is 'borrowed' from others.

Irrespective of our starting point, there needs to be an awareness of what is going on near and around us in order for marketing research to gather momentum. As a matter of fact, enhancing the existing body of knowledge may require more than a one-dimensional effort. Both macro (PESTLE) and micro (competitive set) environmental analyses typically contribute to the successful identification, selection and development of a researchable topic.

Reflective Activity

- What recent macro-environmental changes have you noticed in your home country, which can affect marketing practices, e.g. product, price?
- For a sector of your choice, can you identify any strategic or tactical marketing action, which can stimulate research into existing practices, e.g. place, people?
- How might changes in macro- and micro-environmental conditions impact on one another?

This should also lead us to look beyond the widespread view that the key relationship in marketing is that between an organisation and its customers or consumers. For example, stakeholder theory has provided researchers with a much more comprehensive understanding of how companies can create and share value through a variety of properly managed relations with suppliers, distributors, governments, local authorities, communities, and so on. There is definitely an opportunity to recognise and study meaningful associations through the use of a simple power-interest matrix, a tool that examines and analyses the potential influence of certain stakeholders (power) and their willingness to act on it (interest) (Mendelow, 1991).

The increasing deregulation of the drinks industry in many countries around the world, from Chile to India via Nigeria, has given way to the rise of severe social disruption together with a growing impact on general health issues. The resulting heavier drinking habits displayed by large groups of people have kick-started a counter-process whereby states are considering how to control, and possibly regulate, this trend. This is why several alcohol producers have been working together to appease governments and law-makers, with campaigns aiming at educating the general public on enjoying responsible drinking, indirectly warning them about the risks of binge drinking. In spite of these efforts, the social cost of excessive alcohol intake – this would include short- and long-term medical issues, damage to private and public property – seems to continue escalating, hence understanding how to change opinions, attitudes and behaviours through the use of more appropriate marketing communications

and other elements of the marketing mix (e.g. people, processes and physical evidence) is becoming key to achieving certain strategic marketing objectives.

The impact of marketing resources – be it their presence or absence – on an organisation can be another point of interest for research. Internal analysis in the form of marketing audits is a useful technique for spotting specific requirements as positive and negative associations in relation to important areas, for instance brand image, can be categorised and, among other things, the perceived quality of service delivery measured by assessing other parts of the marketing mix, for example processes. New product development and speed to market were tackled by Standard Bank Argentina as part of a capital investment whose broader aims included the management of project schedules, which gave the bank the ability to establish and meet completion dates for customer marketing campaigns more precisely and effectively. Budgets were also streamlined and savings achieved as a result of that.

Research in Practice: Sugar Consumption Trends

As the world finally caught up with the USA, more questions had to be asked as to what has been driving the increase in consumption of sugar-sweetened foods and drinks to an unprecedented level. Chile and Mexico now top the charts, with Argentina not far behind. A host of other countries, including Saudi Arabia and India, have seen similarly worrying trends, especially considering that high sugar consumption has been linked with weight gain, heart disease, diabetes and stroke. However, there may be some light at the end of the tunnel as research conducted in the UK showed a somewhat opposite trend, due to media coverage and a heightened perception of how sugar can affect one's health for the worse (Langley, 2015).

There appear to be some powerful forces at play, which are shaping the way audiences around the world are reacting to messages from different sources. On the one hand, there are the interests of food and drink manufacturers whose objectives may primarily be driven by financial considerations. On the other hand, not-for-profit and public sector organisations are providing a different voice to try and deliver facts about the effects of excessive sugar consumption. In this highly competitive market, there is definitely room for a variety of studies and investigations on the effectiveness of marketing activities, perhaps comparing how people in different countries understand and process inputs. In broad terms, the marketing objectives of social/societal campaigns are to instill, modify or stop a particular behaviour by changing beliefs, opinions, attitudes and behaviours. This is rather more difficult than enticing consumers to buy what in many cases is a low-involvement purchase.

The simple observation of a phenomenon can raise a host of potentially exciting ideas around a topic, in this case sugar consumption. Secondary data and research should be looked at first together with theories and theoretical frameworks in order to establish potential lines of inquiry. Further reflection is then needed to find some potentially interesting connections between some of these areas, thus establishing a 'blueprint' for eventual development.

Marketing-related investigation is about proactive and reactive research into solutions and innovations

In spite of its many upsides, environmental analysis should be treated with respect. First of all, it is static, whereas the world around us changes constantly, sometimes dramatically. Additional information might in certain circumstances be needed, thus sending researchers back to earlier stages of their projects for fine-tuning purposes. Conversely, over-analysing

situations can often lead to the very opposite issue: paralysis. We should instead accept the fact that we live in a world where perfect information is not achievable and move forward in order to make the best possible decisions, having considered a sufficient range of valid and reliable sources to define the extent of a problem, issue or trend at least in the first instance, i.e. when we initially approach them.

Marketing-Related Investigation

The beginning of any research task is therefore a rather tentative, sometimes even messy, affair as we search for evidence to enable us to put together and support a solid rationale for what is to follow, for what we are going to try and study. This is the time when we win or lose support for our ideas; this is when students need to persuade their tutors or supervisors that they have spotted something worth investigating or that their arguments are logical in a given context. Furthermore, we should not get obsessed with just looking at problems and solutions as this encourages a mainly reactive mode. Marketing as the outward-facing function of an organisation has the task of reading and anticipating signs of change through the creation and interpretation of data and information, eventually leading to better decision making and long-term sustainability (see Chapter 1, Table 1.1). Here, we are going to look at how to effect a transition from a general topic to a research plan by providing a range of examples and illustrations, as depicted in Figure 2.2.



Figure 2.2 Narrowing down marketing research

In other words, we are trying to make connections between a particular area of interest – be that empirical, theoretical or both – and a business environment, so that it is possible to arrive at a suitable formulation of a managerial issue, problem or phenomenon. This will then help with the operationalisation of marketing research, eventually in the shape of a full-blown plan of action.

Identifying issues

General observations in the business environment more often than not lead to interesting findings and directions for research. This is applicable both to struggling as well as thriving companies. In fact, identifying issues becomes crucial during protracted periods of growth when there is little to worry about in terms of fundamental problem solving, and short-term views and executions for more immediate results tend to be preferred. There is indeed a tendency to accept the status quo and to let one's guard down.

For instance, since the revolutionary use of touchscreen technology gave Apple a head start on its competitors with the launch of the first iPhone in 2007, the American company has at times appeared seemingly unstoppable. This has been down to its willingness and ability to continue collecting and interpreting data, even though its success and resulting leadership position might naturally have pushed the firm to ‘milk’ its advantage or, in other words, to be content with its achievements. Indeed, Apple’s success is the result of a widespread research effort in China where many, including arch-rival Samsung, have not been able to sustain business growth over time. For a start, the rather stringent control exerted by the Chinese government and competition from local electronics manufacturers created conditions rarely experienced elsewhere in the world. Looking at the distinguishing features of Chinese customers in relation to their preferences, together with the exploitation of mistakes previously made by others, provided a solid platform on which the company could build.

Along the way, Apple was also adamant that it would not compromise on product and on brand positioning by maintaining a consistent front, which eventually contributed to its strong performance in early 2015. Management executives have relied on the insights provided by research projects focusing on product development, product attributes and benefits (for instance, these led to the launch of the iPhone 6 Plus), brand image, brand equity and consumer relationships, in spite of Apple itself being acknowledged and celebrated as the leader in the specific mobile phone product category. These are all valid examples of angles that students can take in their quest for a suitable way to begin work on an end-of-term piece of assessment.

Research can stem from the desire to anticipate threats and spot opportunities, and it is more useful when it enables us to achieve this well before others can. In other words, there is a lot to be gained by identifying issues before they become problems: ‘It’s about getting better at sensing what the market wants or might do’ (Rao, n.d.). Technology and social listening have indeed added to the armoury of each and every researcher, making data collection yet more flexible and powerful. It has also made it possible to produce quick and effective decision making, sometimes at a much reduced cost. Marketing research should indeed be proportionally more widespread nowadays than it has ever been because our ability to communicate two-way or many ways has greatly improved. The interpretation and presentation of data are still skills that need to be honed over time through study and practice (see Chapters 10, 13, 14 and 15 for more detail); acquiring these skills requires patience, application and reflection over time.

Solving problems

The use of tried-and-tested processes, for example marketing research, which helps in tracking and anticipating change, appears to be preferable to reacting to external and internal conditions. Ignoring potential shocks to the business environment is often the reason why organisations find themselves dealing with a host of undesirable situations. Based on our previous discussion, problems – for example, bad online customer reviews, slow-selling product lines, negative word-of-mouth – are likely to emerge when there is a tendency to take a short-term as opposed to a healthier, long-term view in business. Whatever their origin, these problems are in many circumstances the trigger of marketing research as we seek to come up with and implement solutions to them.

As an illustration, foreign banks in South Korea thought they could take advantage of an opening in the marketplace following changes in the structure of the financial system in the country after the 1998 Asian financial crisis. Their optimism was dictated by the prospect of renewed economic growth and a widespread habit in the local population of keeping large amounts of money in savings: these factors bore the promise of potentially quick returns. Yet, these facts proved insufficient in themselves as the country had, since the 1950s, been supported by and was dependent on a group of established conglomerates known as the 'chaebols', which include Hyundai and Samsung; failing to appreciate the historical evolution of the credit system in South Korea and the central role of these corporations in its society, foreign operators soon found themselves unable to compete.

One of the key problems in marketing terms was to establish their reputation. They lacked an understanding of the psychographic dimensions of consumer behaviour amongst South Koreans: values, beliefs, opinions and interests. As virtually new entrants, they lagged behind their local counterparts and could not enjoy the same kind of relationship with consumers. Standard Chartered is an example of a bank which has not quite captured the essence and nuances of this culture as its brand promise still reads: 'Here for good captures the essence of who we are. It's about sticking by our clients and always trying to do the right thing' (Standard Chartered, 2014). It is at best a shallow statement, especially if one does not know how to articulate what 'doing the right thing' means to a South Korean. The outcome of this absence of foresight is a series of problems linked to the lack of a meaningful and relevant positioning for the business, which would eventually make target audiences pay attention to the bank.

In this respect, a host of potential marketing research projects around brand preference, brand image and associations, consumer values, beliefs and opinions in relation to banking services and banks opens up in front of a student's eyes. The focus here is firmly on finding solutions to problems both at the strategic and the tactical levels in order to attain faster customer acquisition in a hard-fought market.

Reflective Activity

- What news items have you read during the past four weeks in relation to management problems relating to the wider marketing area?
- How did the companies you read about find themselves facing such situations?
- How could they address their problems using marketing research?

Since problems are somewhat part and parcel of our lives, it is sensible to have ways to deal with them, thus limiting their overall impact. As a well-supported systematic process of investigation, marketing research is therefore well placed to help provide solutions and steer decision making. It also makes the implementation of corrective actions more effective and efficient as we cannot expect the competition to stand still.

Understanding phenomena

Another way marketing research contributes to managerial activities – planning, organising, co-ordinating, commanding and controlling – is in the tracking of phenomena that may

have an impact on the sustainability of a business over time. Students can discuss and look into changes in the fabric of society (e.g. morals and morality), the evolution of technology (e.g. crowdsourcing) and the development of markets (e.g. globalisation), as these act as powerful influencers. In many cases, such changes sweep across the world and their intimate understanding could make a huge difference to marketing strategy, its formulation through appropriate marketing objectives and its eventual implementation via detailed marketing programmes. Students should take an interest in exploring phenomena, trends and patterns, especially when they are new and little data, information and knowledge are available on them – this has been the case for the K-Pop wave as this phenomenon spread from South Korea to Vietnam where its understanding is still somewhat limited.

An incredibly dynamic area for marketing research is represented by the willingness of people to engage with others around them as multi-media platforms make broadcasting messages in real time extremely easy. Participation in these exchanges can lead to value co-creation, although this is not necessarily limited to the organisation–consumer relationship. A large amount of information regarding the opinions that people hold about the world around them is publicly available in online platforms and virtual communities alike. Companies have to come to terms with the fact that in these spaces they are not necessarily in control but still have an opportunity to learn from and somehow influence stakeholders.

Research in Practice: Making Sense of Selfies

The selfie as a phenomenon has become all pervasive in our digital-driven culture. People even take huge risks to get the perfect snap in rather dangerous situations, which have, in some circumstances, led to injury and death. There is no doubt that the selfie has influenced the way we live and socialise. One student recently thought about how this fascination might reflect itself in the relationship between brands and consumers. In spite of the popularity of selfies, research on the topic, especially in relation to marketing as a discipline, is still limited; hence, the first steps in the investigation proved rather challenging.

Reading around the topic brought back interesting findings from the field of psychology where the examination of selfies has been associated with narcissism, psychopathy and self-objectification. This contributed to raising some doubts about what branded selfies would eventually contribute to organisations, as consumers mainly appeared to be looking at self-promotion. In other words, the relationship between brands and consumers could turn out to be a shallow one, thus not adding much in terms of brand equity.

Therefore, the investigation moved on to consider different companies and, more broadly, product categories using the work of Interbrand to focus observations on specific brands and, eventually, the content of related branded selfies. At each step, a new field of knowledge would happen to provide another piece of the jigsaw puzzle that had appeared to be incredibly hard to solve. Some of the selfies might as well indicate meaning and value, so it eventually transpired that the relationship between brand and consumer could lead to desirable associations, indirectly identifying another relevant field of knowledge.

Ultimately, the process allowed the topic to be narrowed down at the intersection of narcissism, brand equity and brand associations, such as with celebrities, from what seemed a possibly sterile route for a marketing research project.

Let us now examine one of these new spaces. Although Pinterest may not be known as an environment primarily used to interact with other users, it is still a popular social media platform where people come together and share thoughts and opinions. There is a large

amount of useful information for organisations and students to tap into as boards and group boards provide an ideal situation to showcase ideas in a visual format and encourage exchanges. Muji, the Japanese minimalist brand, benefited from the increasing popularity of Naoto Fukusawa, one of its designers, who went on to build a rather large following on Pinterest, where many of its creations are displayed and discussed. The company itself is officially present via a couple of boards (Products and Stores), yet the interest around the brand is much more widespread with hundreds of boards and pins associated with it.

The collection and analysis of data from this medium, therefore, can provide insight into trends and patterns, which can indicate the existence of particular phenomena and the implications these may have for a particular business. In other words, there may be indications as to what product features and benefits are becoming increasingly popular in order to understand how to engage with audiences on a long-term basis. Trawling through social media data can possibly indicate consumer motivations in general or in relation to a specific brand; these can be economic, hedonic or normative reasons for people to act in a particular way. Such activities enable a researcher to read between the lines and to interpret thoughts and feelings in order to take advantage of key trends as identified from screening peer-to-peer exchanges.

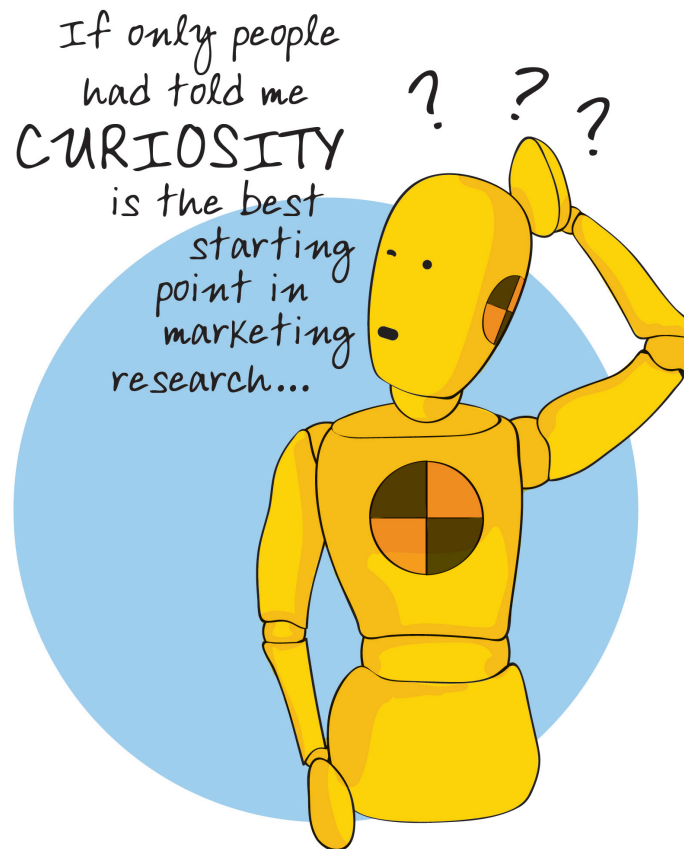


Figure 2.3 The world as a source of inspiration

As we reflect on a research topic in relation to its environment and with regards to its potential relevance in managerial terms, we get nearer to isolating a particular area of interest at the intersection of a number of components that have revealed themselves to us along this journey of reconnaissance. This takes us a step closer to fleshing out ideas in enough detail and, as such, to preparing a plan that can then be put into action.

Researchable Marketing Topics

The transition from marketing-related investigation to actionable marketing research is an important one as it is intended to help define the actual scope of a piece of work, thus ensuring that a desired output can be attained within the constraints, for example the time/deadline set by an institution. In other words, this phase is about operationalising a particular topic as the intersection of a set of fields of investigation that appear to be relevant for a given context.

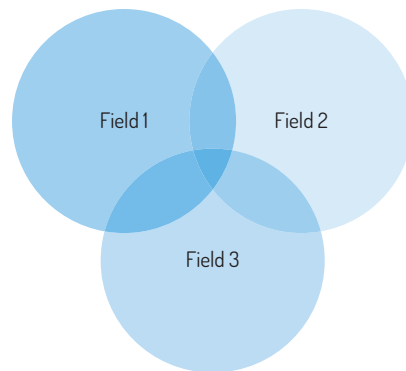


Figure 2.4 Operationalising marketing research

The small area in the middle of Figure 2.4 represents the focus of one's research project, or ideally how a student should think of their topic if they are to succeed with any endeavour. Broad marketing research tasks, such as talking about Starbucks's marketing strategy in China, do not lead to interesting research findings. They are too ambitious in their attempt to make sense of many things (e.g. variables, concepts, constructs) at once. Even worse, they tend to produce a descriptive, summative account of what a company might have been up to over an extended period of time in a particular country. Therefore, it is good practice to narrow down research to something actionable, bearing in mind that this improves its relevance to the researcher, student or otherwise, and ensures the creation of valid and reliable knowledge.

To illustrate, Ghana is one of the largest African economies with a lot of untapped potential, yet its gross domestic product growth has slowed down over the past few years. It seems that some external, uncontrollable forces are beginning to play a part in certain sectors and industries, which might affect the way pricing is approached at a strategic level. As time goes by, such conditions only make it harder to create and deliver consumer value; customers become more demanding, meeting their needs turns out to be increasingly difficult, and developing compelling propositions is a rather big ask. Competitors strive to remain relevant

by trying to find ways to carve a 'monopolistic' position, which eventually allows them to charge a premium for their offerings. For instance, commoditisation has been rife within the telecommunications industry around the world and has led to a sizeable reduction in margins as customers do not perceive any fundamental differences between the services provided by operators. As an answer to a specific assessment brief, a student might be interested to discover the drivers of value for consumers in Ghana in order to understand what local brands can do to sustain meaningful relationships (and generate brand equity in the long term).

A few further concepts begin to emerge in relation to the initial topic, for instance pricing. Perception of value – in principle, this is seen as the benefits obtained less the costs sustained to acquire an offering – is important in order to define the boundaries of what a company can expect to charge its customers.

From the customer viewpoint, value can also be dependent on whether expectations are simply met or exceeded. However defined, customer satisfaction is thought to generate value and enhance relationships between customers and organisations. This may be one of the reasons why a company like Airtel Ghana has invested heavily in customer service 'beyond just the telecommunications needs of our customers' (ModernGhana, 2015). Yet another aspect can be identified and assessed in terms of its relevance to the topic initially chosen or assigned as part of an academic (or professional) brief. Different areas of knowledge are then selected so that the overlapping section (see Figure 2.5) is discreet enough to be manageable from a research standpoint.

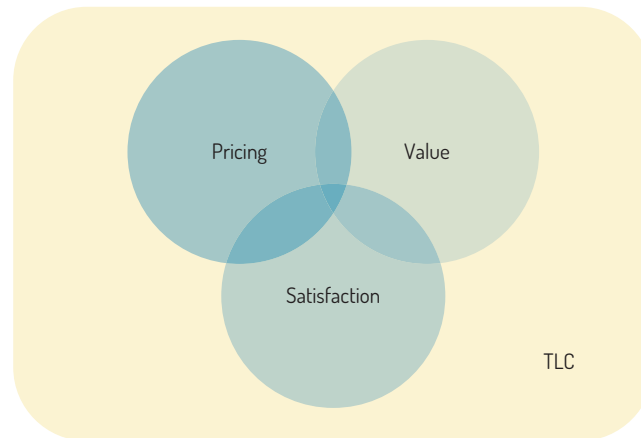


Figure 2.5 Intersecting pricing, value and satisfaction in the Telecommunications (TLC) industry in Ghana

In essence, students need to direct their efforts towards translating managerial issues, problems, phenomena and trends into reasonably self-contained pieces of marketing research. This is how a broad topic is shaped into a workable idea, which provides a sensible purpose in order for the remaining stages of a task to be lined up correctly. In many instances, this will also lead to the formulation of a first draft research question (see Chapter 4 for more detail), linking together all chosen components. During this process, we should try and visualise our thoughts using a large sheet of paper or suitable software in order to ensure that no idea or intuition is discarded a priori. Later on, a selection will eventually have to be made by arranging material according to its relevance so that less compelling pieces of information, concepts and theories are sidelined and a balance is found.

Reflective Activity

- Can you think of a general area of inquiry in marketing and restrict it by adding further layers of knowledge to it?
- What is the overall topic you are thinking of?
- What other concepts and theories are linked with it?

As a further case in point, we can observe the evolution of sport in the USA over the past few years where new and exciting sports have managed to enhance their profile; this has significantly closed the gap with the more traditional sports, such as American football. It has been the case for soccer and cage fighting, which have increased their popularity to a level where they are no longer isolated (e.g. regional phenomena). These sports are beginning to challenge American football, baseball, basketball and ice hockey matches as well as boxing bouts for popularity and attendance. Despite having been present and played in the country for well over a century, rugby union has so far been unable to achieve the same level of recognition. There is support at grassroots level, all the way from schools to colleges and universities around the country, yet rugby has struggled to impose itself. The sport possesses some characteristics that, at face value, should be attractive to many; these being discipline, control and mutual respect. However, it could also be viewed as old-fashioned, traditional and elitist, given that its origins trace back to England. There has certainly been little research into finding out the causes of this lack of progress; the values the game embodies could therefore be a good starting point for an exploration of the subject.

In order for its popularity to increase, rugby union would need to understand what key associations Americans make with it. Areas of knowledge like opinion and attitude formation appear to be important in defining desirable characteristics and set these against the backdrop of what people actually think and feel about the game. Ultimately, research could aim at building an appealing brand personality that resonates with specific target segments, with a view to bridging the gap that is currently holding back the development of the game. The overarching purpose could be to answer a why type of question in order to provide a reasonable set of recommendations as to what needs changing in the minds of American audiences for them to accept rugby as a viable entertainment alternative to other emerging sports in the country. After all, the performances of the national teams have provided some much needed limelight. It seems to be a case of using it in a more proactive fashion.

Reflective Activity: Yo! Sushi

Look back at the Yo! Sushi Snapshot and, given the company's more recent activity, try and answer the following questions:

- What kind of strategic plans in marketing terms could Yo! Sushi put in place in the next few years of operation?

(Continued)

(Continued)

- Based on these, what general topics for marketing research should Yo! Sushi focus on, i.e. try and understand further?
- How could you draw out a more specific research idea from any one of the general topics you have singled out?

Getting Started with Research

Narrowing down a particular marketing topic to a feasible piece of research is as much art as it is science. Likewise, scoping out an assignment can present a student with fundamental choices about what would have to be included, and why. These are hit-and-miss processes at best, during which a variety of thoughts, concepts, ideas and theories are examined, and accepted or rejected, according to their significance in our journey towards stating the purpose of a research project. The work we undertake in the initial stages of any type of inquiry is crucial to setting the direction of what is to come. For instance, the initial output required by academic institutions for an assignment or an end-of-term project could be a research proposal – a short document outlining the main phases of a full-scale piece of research. This can be a rather overwhelming task, as budding researchers can find detailing things out particularly confusing due to a lack of familiarity with their chosen topic as well as the methodological requirements of marketing research.

Preparing a Research Proposal

The basic components of a research proposal can be listed as follows:

- introduction
- research question
- (short) literature review
- methodology
- expected outcome.

In this respect, the definition of the issue, problem, phenomenon or trend of interest is still the most important aspect of this process as it looks to support the rationale for inquiry with credible sources of data and information.

Procter & Gamble failed to recognise important trends in emerging markets. As 2015 was drawing to a close, the company was hard at work, thinking over fundamental decisions about its future all the way from corporate structure to how to implement marketing strategy. Among other things, it appeared that the company had not quite grasped that its Pampers nappies brand in China could be targeted at high-end audiences, and also missed out on developing a wider range of products for segments with fundamentally different needs. Following these observations, it would appear sensible for a student to think of brand extensions as a sensible area for discussion. Both horizontal and vertical extensions could be considered together with the concept of stretching – the ability to remain relevant as a brand expands its lines and ranges.

Having depicted a sensible picture of the situation, students can then put together an initial research question with sufficient emphasis such that it is not too narrow or too broad. Starting with ‘what’, ‘how’ or ‘why’ indeed leads to much more compelling questions. A researcher would want to avoid restricting their inquiry to something that calls for a simple ‘yes’ or ‘no’ answer. It is important to treat this initial stage very much like work-in-progress: there is always time to go back and improve a research question (see Chapter 4 for more information on writing research questions). With regards to Procter & Gamble and Pampers, the following line of inquiry could be regarded as acceptable: *What are the attributes and benefits sought by high-end Chinese audiences with regards to nappies?* Such a question would then lend itself to further qualification, yet it is market-specific, product-specific and points at some marketing theory.

Research in Practice: The Marketing Research Brief

Decision makers and researchers come together to agree briefs with the intent of expressing the requirements of a marketing research project; they are normally meant either for external agencies or internal staff with responsibilities for this area. By and large, they should contain the following:

- Background – Why is the research needed? What kind of issue, problem, phenomenon, and so on, needs to be understood?
- Objectives – Who and what is the research for? What kind of decision is the research going to help with?
- Logistics – How is the research to be operationalised? What kind of constraints, such as time, budget, do we face?
- Sample – How are target audiences to be selected and accessed? What kind of people are we interested in?
- Methodology – How are we going to collect and analyse data? What kind of data do we need, and why?
- Deliverables – How is the research going to be presented? What kind of reporting format and dissemination strategy do we need?

Above all, the output of marketing research has to respond to the managerial requirements attached to it.

Whereas an introduction largely uses empirical data and news items and stems from an observation of the world around us, the literature review in a proposal attempts to establish a basic knowledge of relevant theories in a given context. Looking back at the Pampers example, brand extension, brand stretching, product attributes and benefits had all been touched on. Therefore, it would make sense to provide some coverage of these concepts and, above all, to offer a critical assessment of their individual importance as well as to make connections between them (see Chapter 3 for more details on how to write a literature review), in order to put forth some propositions about the direction of the primary research.

The next part is rather challenging as you may not have developed the necessary knowledge and skills to handle the transition from secondary research to primary research just yet. Drawing a conclusion from the literature review could help greatly. On the one hand, you might have found enough evidence to suggest that verifying an assumption would be the right way to proceed. On the other hand, you might instead be in a position to study something more in detail and suggest how to improve our understanding of it. This could be

illustrated by looking at the difference between (a) theorising a causal relationship between the presence of certain features in the Pampers nappy and their overall attractiveness to certain target segments; and (b) exploring the credibility of the Pampers brand in order to evaluate its ability to stretch into a new product category. This would have a direct bearing on the methodology and data collection techniques, as well as on data analysis, with two rather different solutions: regression analysis (see Chapter 14 for an introduction to this topic) and grounded theory (see Chapter 8 for a practical discussion of this technique), respectively.

Reflective Activity

- What are the key components of a marketing research proposal, and why?
- What should the proposed research question be driven by?
- How can a reasonable methodological framework be put together at such an early stage in one's project?

Finally, it is good practice to outline the key expectations and possible limitations of the research project through building links with the introduction, the literature review and the methodology. In the case of the causal study regarding Pampers, a student could be expected to confirm some previously held assumptions based on the hypotheses under scrutiny. Limitations would most likely be found in areas such as access to and selection of respondents and the administering of questionnaires (and related time and monetary constraints). Of course, there is no certainty as to what would exactly happen, but, after all, a proposal is about providing a reasonable blueprint for a larger research project.

The Marketing Research System

The efforts that we make to clarify the direction of any assignment are going to generate a solid platform for discussion, especially in the case of large-scale research projects as they require more planning and attention. This is because a clear research purpose can more easily be developed into a strong sequence with two main goals in mind: (1) to improve the research question; and (2) to finalise the methodological framework. The next three chapters will provide more help in putting together a comprehensive literature review, linking secondary and primary research effectively, and designing a detailed research plan. Here, we will discuss some overarching basic principles in order to lay down the foundations of marketing research based on its initial definition (see Figure 2.6; see also page 6 in Chapter 1).

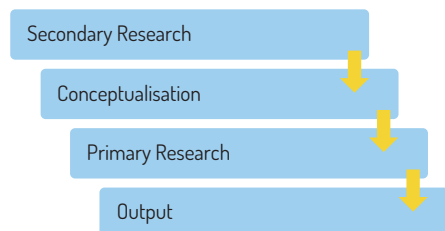


Figure 2.6 A simplified marketing research process

Secondary research

What we may claim to know about a certain subject is only limited by the amount of research that has gone into it. Notwithstanding the fact that there is always a time constraint to any marketing research task, the intensity with which we dig into available, secondary sources of information can generally make the difference between arguing reasonable points and making rhetorical statements which do not have to be answered! Secondary research helps define the fields of investigation we are interested in; it also allows us to find interesting empirical and theoretical evidence from a variety of sources (see Chapter 3 for a more detailed account). By using a critical approach, we can examine and ultimately select data and information in order to build a well-supported position with regards to a particular marketing research topic. In some instances, we can also find clarification on issues and solutions to problems through using existing data and information (Hague and Wilcock, n.d.) in new ways.

In short, secondary research is a route to gaining valuable insight into something, ultimately easing the process of generating a research question and, at times, answering it in full. Students typically use it for short pieces of work with limited scope or wherever the emphasis is restricted to a particular thought or idea. Whatever the need for it, secondary research has to be approached critically and not merely be confined to a footnote in your submission.

Conceptualisation

A conceptualisation summarises all secondary data into a simplified representation of the reality we plan to investigate (see Chapter 4 for further details). It helps generate categories for analysis as well as describe the fundamental character of an issue, problem or phenomenon of interest; it could also be seen as a 'model'. As such, it can serve as a platform for hypothesis generation or to establish connections between larger theoretical constructs for further investigation.

Students of all ages and skills looking to conduct research for a particular purpose should be aware of the importance of this step in order to understand in full how to build a watertight link between what is already known (secondary data) and what could be uncovered (primary data) about their topic of choice. This would play an important role in a marketing research project such as a practice-based paper or a dissertation. Ultimately, you want to figure out whether your research would aim at verifying assumptions or adding detail to existing knowledge.

Primary research

Once there is a clear sense of direction and purpose as a result of the work conducted around secondary data and towards the conceptualisation of a project, the task of a researcher is to take appropriate decisions as to how to collect and analyse the necessary primary data, or the data to be collected to answer a given research question or brief. In other words, the priority shifts to justifying a particular course of action; it is at this point that a full-blown research design should be firmed up in all of its components (see Chapter 5 for more information). At the very least, a researcher is to demonstrate a rationale for employing either an inductive or a deductive approach based

Primary research deals with the generation and analysis of new and unpublished data

on the arguments presented in the conceptualisation of their work, i.e. verifying suppositions from theory or plugging holes in theory (Blackstone, 2015).

Likewise, there needs to be a definite sense of how the data collected will eventually be analysed. For instance, quantitative research mostly looks at differences, associations and cause-and-effect relationships, so the identification of what type of method to choose should be relatively straightforward (and dependent on the research question and the research objectives). By keeping track of our progress and looking back at our objectives, we ensure that a realistic and consistent flow is maintained at all times. In this way, the implementation of a systematic process of marketing research is more often than not guaranteed.

Output

The closing stages of a research project are characterised by excitement as we set our sights on a tangible reward for our efforts: knowledge acquisition. The outcome of research is acceptable as long as the process followed is sound (see Chapter 5 for more detail). If a hypothesis is disproven, we may need to collect further data, such as increasing the sample size or understanding what went wrong by means of a new study with a different emphasis (i.e. inductive rather than deductive reasoning). Similarly, qualitative inquiry might unveil new categories or themes to be the subject of explanation or description, thus leading to more research being undertaken to complement the initial purpose. Whatever happens, a researcher must arrive at an answer for their original research question through presenting a logical final argument. They can then add their considerations about limitations and future endeavours. This is to ensure that the whole project has gone full circle, whereby a question or a brief was put out there for which an answer has been found.

Rarely will a student find an explicit reference to the fact that their research needs to flow from the top down and, most importantly, from the bottom up. This means that once a research question and some research objectives are settled on, the analysis of the findings should address them in full.

Advanced: Using Marketing Research

A large number of marketing research projects derive from strategic and tactical management issues and problems which organisations find themselves facing. As a result of this, the global revenue generated by companies operating in the field reached the US\$40 billion mark in 2013; of course, this does not include internal budgets and the investments made to hire skilled staff in marketing research-related roles. It does sound like a lot of money and time are put into finding appropriate answers to research questions. Yet there are several obstacles to the use of marketing research, which can be linked back to the 'implementation gap' as well as 'individual marketing competencies' or, more precisely, the lack thereof (Meldrum, 1996). Even though organisations might have the potential to move forward by adding insight to their strategy and tactics, they fail to realise any of it because there is a poor fit with their capabilities, systems, policies and culture. This is why it is important to know how to use the output of marketing research and, above all, to have the necessary management buy-in for a project to succeed.

Chapter Summary

Looking at marketing-related issues, problems and phenomena raises a series of concerns as to the means of shaping a broad topic into a feasible piece of research. This chapter has drawn attention to some essential aspects of marketing research while touching on how to generate valid and reliable knowledge, irrespective of the methods used – in fact, these will be dealt with in Parts III and IV of this book.

To begin with, it was noticed that the business environment tends to influence the way in which we narrow down a general inquiry to a viable research question. This is not just about the uncontrollable, for example the political, legal variables that define a country or countries (frame of reference) where research is to be conducted. It also has to do with the sectors and industries a researcher might be interested in as well as specific organisations and the kind of strategic and tactical marketing dilemmas they might face at a specific moment in time. In this respect, the managerial formulation of issues and problems in marketing terms is an important element. It should lead us to consider a range of concepts and theories, especially when working as an insider – for instance, this could be the case for a student interning at an organisation and looking to provide insight into a specific area of marketing.

Then a researcher has to be able to translate data and information about a particular topic into an actionable piece of research by detailing out an appropriate research question (and eventually a research aim and some objectives). From here, a research plan should emerge; it would ideally look at how to collect and how to analyse data within the parameters set at the conceptual level. In other words, emphasis should be put on linking secondary research and primary research together in a meaningful and structured way that respects the systematic process of marketing research.

With an adequate plan in place, the researcher can then proceed to tie together all the various stages in order to obtain targeted data with which to attempt to answer the research question. As said, it is not necessarily about achieving a desired outcome, but about respecting the logical nature of the process. Any methodological imprecision would eventually detract from the conclusions of any piece of research and, at times, render them invalid, unreliable or both.

Case Study: The Perception of Sound

Streaming has changed the way we listen to and consume music as we no longer need to own LPs, CDs or any other physical medium. At the same time, this fundamental shift has opened the doors for new players to enter the market, developing new hardware, as traditional mass electronics and niche hi-fi manufacturers hadn't anticipated this revolution and the role mobile devices would eventually come to play in society. Sonos was founded in 2002 and has grown to offer a 'smart speaker system that streams all your favourite music to any room, or every room' (Sonos, 2015).

Despite a favourable location, South America has not quite warmed to the products the American company markets so successfully in other parts of the world. The newly appointed UK Chief Marketing Officer believes that the key to expanding further is in the speed at which innovation is adopted by consumers,

[Continued]

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which might indicate how little Sonos is understood by consumers in countries as far afield as Argentina and Colombia (Ghosh, 2015).

There appears to be work needed to entice consumers, especially those not naturally inclined to try out new and exciting things, the so-called 'innovators'. However, achieving a certain critical mass could be an issue as, besides making people realise that they want wireless speakers, the products themselves come with a rather steep price tag and are beginning to be threatened by cheaper alternatives (e.g. those of Samsung).

Of course, the speakers, home cinema solutions and components come with a number of additional features such as music (content), telephone application (controller) and trueplay (optimisation, tuning software). Most importantly, several services have been made available on Sonos, including Spotify, TuneIn, Google Play Music, SoundCloud, Deezer, Amazon Music Library, Napster and many others, depending on location. The company has indeed put quite a lot of effort into improving accessibility to these services around the world by signing deals with the likes of Deezer. It is a strategic choice to build long-term relationships and to reduce the time lag experienced by the brand while attempting to move consumers from awareness to consideration – this is a result of the work needed to overcome a lack of knowledge about the brand and to achieve a positive attitude towards the brand.

Like any company moving on to the international stage at pace, Sonos needs to consider its marketing distribution network in South America: what it has at present and what it needs going forward. It is not easy to strike the right balance, as the company doesn't want to enter into too many partnerships with distributors, before it has achieved a reasonable level of interest from consumers in the market. Partners like PreSonos, which cover several local markets, look well positioned to serve target segments for the time being, but where will the company be in five years as more pressure is applied by brands like Bose and Denon, which already have global presence and recognition (Fowler, 2015)? It seems that any competitive advantage Sonos enjoyed as a result of the disruption it introduced in the home audio market just over ten years ago has dissipated almost entirely.

The task is to see what can be done to crack South American markets within a relatively short space of time, in order to prevent others from catching up or, even worse, establishing themselves as category leaders in countries like Brazil or Colombia. The company itself recognises that 'The market 10 years from now will be huge with high penetration into homes around the globe [...] Ten years from now, the music that plays in a room will adapt even more to the room, who is in the room, what time of day it is, and even what type of day they've had' (Palenchar, 2015). There is a fundamental assumption that the demand for Sonos' offerings is going to be there, although the transition from selective to mass distribution does not appear to be as clear-cut.

These contrasting signs should be researched and interpreted more precisely. It is important for a business to maintain a can-do attitude, yet this shouldn't come in the way of understanding and pre-empting issues and phenomena that may turn into problems if left unchecked. There are several aspects of Sonos' marketing strategy in South America and marketing management in each of the countries where it operates to look into – these are and should be controlled.

Case study questions:

1. What kind of general topics for inquiry can you recognise (either relating to the empirical or the theoretical evidence provided)?
2. How would the observation of the business environment help you focus the discussion of any of these marketing-related issues?
3. What research question appears to be emerging from your work so far? Can you write anything down?
4. How could a research plan develop from the reflection you have conducted so far? Are there any elements that should be researched further?

End of Chapter Questions

These questions should help you reflect on your understanding of this chapter:

1. How can the (business) environment around us help with singling out suitable marketing research topics?
2. What can an internal marketing audit do for researchers?
3. How do managerial considerations potentially influence the direction of marketing research?
4. What are three common ways to think of marketing-related investigation?
5. How can marketing research be narrowed down to a viable research question?
6. What are the core components of a marketing research proposal?
7. What are the basic stages of a marketing research process?
8. Why should a piece of research work from the top down and, more importantly, from the bottom up?

Checklist

After studying Chapter 2, you should now be familiar with these key concepts:

1. The breakdown of the systematic marketing research process
2. How the business environment can influence marketing research
3. The boundaries of marketing-related investigation
4. The characteristics of researchable marketing topics
5. How to get started with research

Further Reading (in sequence from beginners to advanced)

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