

MKTG 6105 (SPRING 2025) Updated (01.09.2025)
ADVANCED TOPICS IN MARKETING
QUALITATIVE & SURVEY METHODS FOR BUSINESS RESEARCH

A. GENERAL INFORMATION

Instructor: Dipankar Chakravarti
CRN: 22044
E-mail: dchakra1@vt.edu
Phones: Cell: 720.938.7536 (Primary) ; Home: 443.546.1042 (Emergencies only)
Office Hours: By appointment. Please e-mail me for appointments
Class Meetings: M 9.00 a.m. – 12 noon
Classroom: Zoom: <https://virginiatech.zoom.us/j/4435461042> Password: DCD CDC
Pre-requisites: Instructor consent
Teaching Assistant: Angela Yi (angelay19@vt.edu)

B. COURSE MATERIAL

There are two recommended textbooks for this course.

1. Taylor, Steven J., Robert Bogdan and Marjorie L. DeVault (2015), *Introduction to Qualitative Research Methods: A Guidebook and Resource.* 4th Edition, Hoboken, NJ: John Wiley & Sons.
2. Dillman, Don A., Jolene D. Smyth and Leah Melani Christian (2014), *Internet, Phone, Mail and Mixed Mode Surveys: The Tailored Design Method.* 4th Edition, Hoboken, NJ: John Wiley & Sons.

C. COURSE OBJECTIVES

This is an advanced course in qualitative and survey methods that address basic and applied research problems in business. *The course is not an introductory research methods course.* Students should have a serious interest in how social science research is conceived, conducted, implemented, and interpreted in business contexts. Working knowledge of basic statistics is assumed. Students will also require a good understanding of substantive business contexts. The specific course objectives are to help students develop the skills to:

- translate basic/applied business issues into appropriate academic research questions
- identify the appropriate method(s) of investigation for a range of business research questions
- evaluate governing principles, and merits and limitations of qualitative and survey research approaches
- recognize the independent and supporting roles of qualitative and survey research in business contexts
- design and conduct business research studies using qualitative and/or survey methods
- interpret the research results, assess the substantive meaning and implications of the findings
- situate business research in the broader context of applied social research

D. COURSE MECHANICS AND GRADING

The course will meet as specified in the class schedule. Class meetings will involve lectures, discussion, critical analysis and synthesis of assigned readings. Students must stay current with reading assignments and contribute to class discussion. Grades will be based on the following items:

- Class Participation: 10%
- Research Project (Qualitative component) 30%
- Research Project (Survey component) 30%
- Final Take-home Examination 30%.

E. CLASS SCHEDULE – OVERVIEW (All classes will be remote via Zoom unless otherwise announced)

MODULE I: QUALITATIVE RESEARCH METHODS

01/27	M	Session 1: Course Organization and Overview Session 2: Qualitative Research Methods: Overview and Epistemological Stances
02/06	TH	Session 3: Depth Interviews: Concepts & Processes (Note one-time changed date) Session 4 Qualitative Research Project (QRP) Assignment
02/10	M	Session 5: Group Interviews: Traditional and Online Implementation Session 6: Ethnography: Traditional Methodologies (QRP Proposal Due)
02/17	M	Session 7: Ethnography: Internet Variants (Netnography) Session 8: Ethnography: Analysis, Interpretation, Writing and Ethical Issues
02/24	M	Session 9: Qualitative Research with Archival and Secondary Research Session 10: Case Studies and Clinical Research (Checkpoint QR Project)

MODULE II: MEASUREMENT METHODS

03/03	M	Session 11: Measurement: Representational Concepts Session 12: Spatial Representations (Multidimensional Scaling)
03/10	M	No Class – Spring Break
03/17	M	Session 13: Non-Spatial (Clustering) & Graph Theoretic (Tree) Representations Session 14: Set Theoretic Representation (Similarity Scaling) Qualitative Research Project Paper Due (E-mail to dchakra1@vt.edu by 11.59 p.m. EST)
03/24	M	Session 15: Measurement: Psychometric Concepts Session 16: Classical Test Theory
03/31	M	Session 17: Item Response Theory Session 18: Generalizability Theory Survey Research Project (SRP) Assignment
04/07	M	Session 19: Construct Validation - Methodology Session 20: Reflexive and Formative Indicators

MODULE III: SURVEY RESEARCH – DESIGN AND IMPLEMENTATION

04/14	M	Session 21: Survey Instrumentation - Questionnaire Design Session 22: Self-Administered Surveys (Mail and Internet) Checkpoint SRP Project
04/21	M	Session 23: Survey Implementation - Administered and Mixed Mode Interviews Session 24: Simple Random Sampling
04/28	M	Session 25: Stratified and Cluster Sampling Approaches Session 26: Applied Sampling -Current and Emerging Issues Survey Research Project Paper Due E-mail to dchakra1@vt.edu by 11.59 p.m. EST)

MODULE IV: SYNTHESIS AND SUMMARY

05/05	M	Session 27: Meta-Analysis and Effect Size: Concepts and Applications Session 28: Validity and the Research Process Course Summary (Take-Home Final Exam Assignment)
05/14	W	Take-Home Final Exam Due (E-mail: dchakra1@vt.edu by 11.59 p.m. EST)

F. DETAILED CLASS SCHEDULE AND READING ASSIGNMENTS

The class schedule and reading list follows. Students are responsible for staying in touch with daily course progress and for securing assigned course materials (see Canvas posts). Titles under “Additional References” are suggestions for independent reading. Work on course projects should proceed concurrently with coursework (checkpoints indicated).

MODULE I: QUALITATIVE RESEARCH METHODS

01/27 M Session 1: Course Organization and Overview
Session 2: Qualitative Research Methods: Overview and Epistemological Stances

1. Taylor, Bogdan and Devault, Chapters 1-2
2. Chakravarti, Dipankar and Rowena Crabbe (2019), “Qualitative Research for Consumer Psychology.” In F. Kardes, P. Herr and N. Schwarz eds. *Handbook of Research Methods in Consumer Psychology*. New York, NY, Routledge.

Additional References:

1. Schwandt, Thomas A. (2015), “*The Sage Dictionary of Qualitative Inquiry*.” 4th ed. Thousand Oaks, CA, Sage
2. Denzin, Norman, Yvonna Lincoln, Michael Giardina and Gaile Cannella (2024), “Introduction: The Discipline and Practice of Qualitative Research.” In N. Denzin, Y. Lincoln, M. Giardina & G. Cannella, eds., *The Sage Handbook of Qualitative Research*, 6th ed, Los Angeles, CA. Sage. 1-28

02/06 TH Session 3: Depth Interviews: Concepts and Processes (Note one-time schedule change)
Session 4: Qualitative Research Project (QRP) Assignment

1. Taylor, Bogdan and DeVault, Chapters 3-4
2. McCracken, Grant (1988), “*The Long Interview*.” *Qualitative Research Methods*, #13, Los Angeles, CA, Sage.

Additional References:

1. Brinkman, Svend (2016), “The Interview.” In N. Denzin & Y. Lincoln eds., *The Sage Handbook of Qualitative Research*, 5th ed, Los Angeles, CA, Sage, 576-599

02/10 M Session 5: Group Interviews: Traditional and Online Implementation
Session 6: Ethnography: Traditional Methodologies (QRP Proposal Due)

1. Stewart, David and Prem N. Shamdasani (2015), “*Focus Groups: Theory and Practice*,” 3rd Edition Applied Social Research Methods Series, 20, Los Angeles, CA, Sage. (Read Chapters 1-3; 9-10; Skim Chapters 4-8)
2. Taylor, Bogdan and DeVault, Chapters 5-7, Appendix 1-2

Additional References:

1. Santhosh, Lekshmi, Juan C. Rojas and Patrick G. Lyons (2021), “Zooming into Focus Groups: Strategies for Qualitative Research in the Era of Social Distancing,” *ATS Scholar Perspectives*, 2, 2, 1-9
2. Jones, Janet, :Laura L. Jones, Melanie J. Calvert, Sarah Damery and Jonathan M. Mathers (2022), “A Literature Review of Studies that Have Compared the Use of Face-to-Face and On-line Focus Groups,” *International Journal of Qualitative Methods*, 21, 1-12.
3. Chakravarti, Dipankar, Carol Bruneau, Dan Mittelman and Peggy Sue Loro (Updated 2025), “Electronic Focus Groups.” PowerPoint Presentation (Canvas Post)

02/17 M Session 7: Ethnography: Internet Variants (Netnography)
Session 8: Ethnography: Analysis, Interpretation, Writing and Ethical Issues

1. Fetterman, David M. (2010), "*Ethnography Step By Step*." 3rd ed. Vol. 17 Applied Social Research Methods Series, Los Angeles, Sage (read Chapters 1-3, 5-7, Appendix, Skim Chapter 4)
2. Kozinets, Robert and Ulrike Gretzel (2024), "Netnography in the Age of Technocultures." In N. Denzin, Y. Lincoln, M.Giardina & G. Cannella, eds., *The Sage Handbook of Qualitative Research*, 6th ed, Sage. 403-420.

Additional References:

1. Spradley, James P. (2016), "*Participant Observation*." Long Grove, IL: Waveland Press
2. Kozinets, Robert (2015), "*Netnography Redefined*." 2nd ed., Los Angeles, Sage.
3. Richardson, Laurel and Elizabeth Adams St. Pierre (2016), "Writing: A Method of Inquiry." In N. Denzin & Y. Lincoln eds., *The Sage Handbook of Qualitative Research*, 5th ed, Los Angeles, CA, Sage 818-838.
4. Cannella, Gaile and Yvonna Lincoln (2024), "Ethics, Research Regulations and Critical Social Science." In N. Denzin, Y. Lincoln, M.Giardina & G. Cannella, eds., *The Sage Handbook of Qualitative Research*, 6th ed, Los Angeles, CA. Sage. 61-74

02/24 M Session 9: Qualitative Research with Archival and Secondary Sources
Session 10: Case Studies and Clinical Research (Checkpoint QRP Project)

1. Hodder Ian (2000), "Interpreting Documents and Material Culture." In N. Denzin & Y. Lincoln eds., *Handbook of Qualitative Research*, 2nd ed. Thousand Oaks, CA, Sage Publications, 703-716.
2. Yin, Robert K. (2014), "*Case Study Research: Design and Methods*." 5th ed. Applied Social Research Methods Series, Volume 5, Los Angeles, CA, Sage. (Skim)

Additional References:

1. Anssi Perakyla and Johanna Ruusuvaori (2016), "Analyzing Talk and Text." In N. Denzin & Y. Lincoln eds., *Handbook of Qualitative Research*, 5th ed, Los Angeles, Sage, 669-691
2. Miller, William L. and Benjamin Crabtree (2005), "Clinical Research." In N. Denzin & Y. Lincoln eds., *The Sage Handbook of Qualitative Research*, 3rd ed., Thousand Oaks, CA, Sage Publications, 605-639

MODULE II: MEASUREMENT METHODS

03/03 M Session 11: Measurement: Representational Concepts
Session 12: Spatial Representations (Multidimensional Scaling)

1. Judd, Charles M. and Gary H. McClelland (1998), "Measurement." In D. Gilbert, S. Fiske, and G. Lindzey, eds., Chap. 5, *Handbook of Social Psychology*, 4th ed, New York, Oxford, 180-232. (Review pages 180-201).
2. Kruskal, Joseph B. and Myron Wish (1978), "*Multidimensional Scaling*." Volume 7, Quantitative Applications in the Social Sciences, Thousand Oaks, CA, Sage Publications.

Additional References (Textbook):

Borg, Ingwer, Patrick Groenen, Patrick Mair, (2018), *Applied Multidimensional Scaling and Unfolding*, 2nd ed., Springer.

03/10 M No class. Spring Break

03/17 M Session 13: Non-Spatial (Clustering) & Graph Theoretic (Tree) Representations
Session 14: Set Theoretic Representation (Similarity Scaling)
QRP Paper Due (E-mail to angelay19@vt.edu and dchakra1@vt.edu by 11.59 p.m. EST)

1. Aldenderfer, Mark S. and Roger K. Blashfield (1984), "*Cluster Analysis*"
2. Arabie, Phipps, J. Douglas Carroll and Wayne S. DeSarbo (1987), "Three Way Scaling and Clustering." Volume 65, *Quantitative Applications in the Social Sciences*, Thousand Oaks, CA, Sage Publications
3. Corter, James E. (1996), "*Tree Models of Similarity and Association*." Volume 112, *Quantitative Applications in the Social Sciences*, Thousand Oaks, CA, Sage Publications.
4. Tversky, Amos (1977), "Features of Similarity." *Psychological Review*, 84, 4, 327-352.

Additional References (Textbook):

1. Bezdek, James C. (2017), *A Primer on Cluster Analysis: 4 Basic Methods That (Usually) Work*
2. Aggarwal, Charu C. and Chandan K. Reddy (2013), *Data Clustering: Algorithms and Applications*, Chapman and Hall/CRC Data Mining and Knowledge Discovery Series

03/24 M Session 15: Measurement: Psychometric Concepts
Session 16: Classical Test Theory

1. Judd, Charles M. and Gary H. McClelland (1998), "Measurement." In D. Gilbert, S. Fiske & G. Lindzey, eds., Chapter 5, *Handbook of Social Psychology*, 4th edition, New York, NY, Oxford University Press, 180-232. (Read pages 201-232).

Additional References:

1. Raghavarao, Damaraju, James B. Wiley, and Pallavi Chitturi, (2010), *Choice-Based Conjoint Analysis: Models and Designs*, Boca Raton, FL CRC Press.
2. Sijsma, Klaas (2009), "On the use, the Misuse, and the Very Limited Usefulness of Cronbach's Alpha." *Psychometrika*, 74, 107-120
3. Sijsma, Klaas and Julius M. Pfadt (2021), "On the use, the Misuse, and the Very Limited Usefulness of Cronbach's Alpha: Discussing Lower Bounds and Correlated Errors." *Psychometrika*, 74, 107-120

03/31 M Session 17: Item Response Theory
Session 18: Generalizability Theory
Survey Research Project (SRP) Assignment

1. Hambleton, Ronald K., H. Swaminathan and H. Jane Rogers (1991), "*Fundamentals of Item Response Theory*." Vol. 2, *Measurement Methods for the Social Sciences*, Thousand Oaks, CA, Sage Publications.
2. Rentz, Joseph O. (1987), "Generalizability Theory: A Comprehensive Method for Assessing and Improving the Dependability of Marketing Measures," *Journal of Marketing Research*, 24, 1, 19-28.

Additional References:

1. Bonifay Wes (2020), "Multidimensional Item Response Theory." Volume 183, *Quantitative Applications in the Social Sciences*, Thousand Oaks, CA, Sage Publications.
2. Shavelson, Richard J. and Noreen M. Webb (1991), "*Generalizability Theory: A Primer*." Vol 1, *Measurement Methods for the Social Sciences*, Thousand Oaks, Ca, Sage Publications.
3. Brennan, Robert L. (2001), "*Generalizability Theory*." Springer Statistics for the Social Sciences.

04/07 M Session 19: Construct Validation - Methodology
Session 20: Reflexive and Formative Indicators

1. Campbell, Donald T. and Donald W. Fiske (1959), "Convergent and Discriminant Validation by the Multitrait-Multimethod Matrix.", *Psychological Bulletin*, 56, 81-105
2. Bagozzi, Richard P. and Youjae Yi (1991), "Multitrait-Multimethod Matrices in Consumer Research." *Journal of Consumer Research*, 17, 4, 426-439.
3. Bagozzi, Richard P. and Youjae Yi (1993), "Multitrait-Multimethod Matrices in Consumer Research: Critique and New Developments." *Journal of Consumer Psychology*, 2, 2, 143-170.
4. Jarvis, Cheryl Burke, Scott B. Mackenzie and Philip M. Podsakoff (2003), "A Critical Review of Construct Indicators and Measurement Model Misspecification in Marketing and Consumer Research." *Journal of Consumer Research*, 30, 2, 199-218.

Additional References

1. Fabrigar, Leandre R., Duane T. Wegener, Robert C. MacCallum and Erin J. Strahan (1999), "Evaluating the Use of Exploratory Factor Analysis in Psychological Research." *Psychological Methods*, 4, 3, 272-299.
2. Voss, Kevin E., Eric R. Spangenberg and Bianca Grohmann (2003), "Measuring the Hedonic and Utilitarian Dimensions of Consumer Attitude." *Journal of Marketing Research*, 50, August, 310-320.

MODULE III: SURVEY RESEARCH - DESIGN AND IMPLEMENTATION

04/14 M Session 21: Survey Instrumentation - Questionnaire Design
Session 22: Self-Administered Surveys (Mail and Internet) Checkpoint SRP Project

1. Dillman, Smyth and Christian, Skim Chapters 1 – 3 and 6
2. Dillman, Smyth and Christian, Read Chapters 4, 5 and 7.

Additional References:

1. Dixon, John, and Clyde Tucker (2010), "Survey Nonresponse." In P. Marsden and J. Wright, eds. *Handbook of Survey Research*, 2nd ed. Chapter 19, New York, NY, Academic Press.593-630
2. Ward, M.K. and Adam W. Meade (2023), "Dealing With Careless Responding in Survey Data: Prevention, Identification and Recommended Best Practices." *Annual Review of Psychology*, 74, 577-596
3. Loebenberg, Gemma, et al. (2023), "Bot or Not? Detecting and Managing Participant Deception When Conducting Digital Research Remotely: Case Study of a Randomized Controlled Trial.
<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10540014/>

04/21 M Session 23: Survey Implementation - Administered and Mixed Mode Interviews
Session 24: Simple Random Sampling

1. Dillman, Smyth and Christian, Skim Chapters 8 and 12; Read Chapters 9 - 11
2. Frankel, Martin (2010), "Sampling Theory." In P. Marsden and J. Wright, eds. *Handbook of Survey Research*, 2nd ed. Chapter 4, New York, NY, Academic Press. 83-138 (**Read pages 83-109**)

04/28 M Session 25: Stratified and Cluster Sampling Approaches
Session 26: Applied Sampling -Current and Emerging Issues
Survey Research Project Paper Due E-mail to dchakra1@vt.edu by 11.59 p.m. EST)

1. Frankel, Martin (2010), "Sampling Theory." In P. Marsden and J. Wright, eds. Handbook of Survey Research, 2nd ed. Chapter 19, New York, NY, Academic Press. 83-138 (Read pages 109-127)
2. Chakravarti, Dipankar (2025), "Bayesian Reasoning in Sampling." Teaching Note, Pamplin College of Business, Virginia Tech,

MODULE IV: SYNTHESIS AND SUMMARY

05/05 M Session 27: Meta-Analysis and Effect Size: Concepts and Applications
Session 28: Validity and the Research Process
Course Summary
Take-Home Final Exam Assignment

1. Hunter, John E. and Frank L. Schmidt (2014), "*Methods of Meta-Analysis: Correcting Error and Bias in Research Findings.*" 3rd Edition. Chapters 1 and 2
2. Brinberg, David and Joseph E. McGrath (1985), "*Validity and the Research Process.*" Los Angeles, CA, Sage
3. Edeling, Alexander and Mark Fischer (2016), "Marketing's Impact on Firm Value: Generalizations from a Meta-Analysis." *Journal of Marketing Research*, 53, 4, August 515-534 (Skim)
4. Jachimowicz, Jon M., Shannon Duncan, Elke U. Weber and Eric J. Johnson (2019), "When and Why Defaults Influence Decisions: A Meta-Analysis of Default Effects." *Behavioral Public Policy*, 3, 2, 159-186 (Skim)

Additional References:

1. Hunter, John E. and Frank L. Schmidt (2014), Chapters 3-10 Meta-Analysis of Correlations, Experimental Effects and Other Dichotomous Comparisons; Chapters 9 -14: General Issues in Meta-Analysis

05/14 W Take-Home Final Exam Due (E-mail: dchakra1@vt.edu by 11.59 p.m. EST)