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Small Business Perceptions of Online Marketing Research

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Abstract
Concerns over the overall cost of marketing research and the cost per usable response have in large measure caused marketing practitioners to turn to online marketing research techniques, either as a solus technique, or in a mixed mode application. However, the use of e-mail and mixed mode surveys such as postal invitations to complete online questionnaires present both familiar and new issues, as the extant literature illustrates. This paper examines an earlier study before reporting findings from the present study, which employs a method that ascertains the probability of commissioning and/or responding to four survey research methods, described in scenarios and delivered using e-mail and the World Wide Web (Web). It is evident that while perceptions of e-mail, the Internet, and privacy have changed since early use of the Internet and more particularly the World Wide Web, and there is acknowledgement in the literature concerning the lower costs and faster response speeds of online marketing research, small businesses do appear to discriminate in favour of targeted online survey methods over postal surveys, portrayed as scenarios in this study. They indicate a greater likelihood of responding to targeted, hybrid email/Web surveys than traditional postal surveys.

Introduction
There has been a noticeable growth in direct and online marketing that is reliant on database creation, maintenance, and data mining, such that over the period 1995 to 2001 in Australia, expenditure in this area of marketing grew from $6.6 billion to $16.4 billion, and came to represent over twice the expenditure on main media (Kotler, Brown, Adam and Armstrong, 2004). The strength of this approach to both vendors and buyers lies in the value buyers perceive from their individual wants and desires being acted on by the vendor over a period of time (Loveman, 2003). Nevertheless, the mass marketing paradigm remains in evidence in repertoire markets (e.g., fast moving consumer goods) (Sharp, Wright and Goodhardt, 2002), and its reliance on marketing research to assess the performance of marketing mix variables.

The authors gratefully acknowledge the advice and infrastructure support received from Telstra Corporation and AMRinteractive in conducting the study reported in this paper. To the many respondents, we offer our thanks.
(Culliton, 1948; Borden, 1964) such as advertising continues. There is also much to be gained where direct and online marketers conduct marketing research that supplements database information concerning the value of customers and their preferences, and which is used for predictive purposes (DeTienne and Thompson, 1996; Evans, 1998; Stone and Jacobs, 2001).

In the case of repertoire markets, in particular, the issues surrounding marketing research continue to attract attention, particularly insofar as falling response levels (e.g., Bednall and Shaw, 2003), and the study of methods to remedy the situation (e.g., Taghian and Shaw, 2000), are concerned. Falling response levels directly affect the cost per usable response as well as reliability. There are other issues involved that include coverage in repertoire markets, and the related issue of data quality generally (Schaefer and Dillman, 1998).

Typically, marketing research that investigates customer/consumer responses to marketing effort is complemented by research into the views of marketing decision-makers as to how organisation performance relates to strategic expenditure on various marketing elements such as marketing communication, marketing logistics, relationship management, and direct and online marketing. More often than not, such views are sought from decision-makers from larger organisations (i.e., employee numbers > 20) for reasons that include that fact that these organisations have specialist marketing departments. While it is intuitively appealing to believe that marketing decision-makers from such organisations are more willing to respond to survey research, at least one recent study shows that this is not the case. The AFR Boss 2003 Marketing Directions Survey conducted by Fairfax Business Research sought information from "2,000 of Australia's most senior marketing executives", and received responses "from 113 executives in total, a response rate of just over 5 per cent" (Burbury, Shoebridge and Hall, 2003, p. 54).

While there have been studies of small business use of the Web in their operations (e.g., Poon and Swatman, 1999; Adam and Deans, 2001), little has been done to examine small business use and perceptions of marketing research in general, and online methods of data collection specifically. The study reported in this paper, and which involves small business, continues the examination of data collection techniques adopted by marketing organisations in their efforts to overcome impediments to achieving optimal decision science information.

**Background**

In conducting marketing research to assess the performance of marketing mix elements such as advertising, one or all of a variety of research approaches are employed. These approaches range from relatively lower cost observational techniques through to relatively higher cost survey research.

**Spectrum of Survey Research Methods**

In this paper, the focus is not on the choice of research approach such as when less costly qualitative research is substituted for more costly quantitative research, but on the choices available when embarking on the use of survey research. While the costs of various survey research methods can be reduced, other issues (e.g., coverage errors) may arise (Bachmann, Elfrink and Vazzana, 1996; McDonald and Adam, 2003).

At the more expensive end of the survey research spectrum lies the deployment of single-use lists purchased from reputable vendors coupled with printer questionnaires posted to the sample frame. At the less expensive end of the spectrum lies the use of e-mail to gather responses from a list of addresses draw
from a subscriber market such as members of a theatre company (Garbarino and Johnson, 1999). In between lie various mixed mode and hybrid approaches that are primarily designed to overcome low response levels and/or reduce the likelihood of coverage errors (Schaef er and Dillman, 1998). It is not the intention to cover each and every self-administered survey research approach in this paper, but rather to focus on postal, e-mail and mixed mode, and the use of email invitations to an online Web-based questionnaire, which we have termed hybrid mode.

Postal
The costs of printing invitations and questionnaires, two-way postage, spraying home and/or business unit barcodes, and calling usable responses, have spurred practitioners and academics to turn to use of TCP/IP (transmission control protocol/Internet protocol) technologies, notably the World Wide Web (Web), and Mobile telephone networks, in survey research.

The major benefit afforded by self-administered postal surveys lies in the fact that those who can be identified by their address are not intruded upon to the same degree that electronic approaches interrupt. Moreover, recipients have a hard copy to complete at their leisure. At issue though, is whether recipients can be bothered to complete the questionnaires they receive and/or item-skip, particularly where personal information is asked for. This assumes that their comprehension of the written questions is such that they are able to answer accurately, or at all.

E-mail
At a theoretical level, and at a decreasing rate at a practical level, e-mail enables interaction between individuals, between individuals and entities such as business and government, and between these entities. It is contended that there is a decreasing rate of interaction at a practical level because e-mail has become perverted by its adoption as the favourite tool of spammers, and by the wider persistent offence of sending larger and larger threaded e-mails, thus clogging users’ inboxes. Spam is e-mail sent in bulk and which is deceptive in nature (NOIE, 2002; SpamLaws.com, 2003). It is taken as a given that the threat of computer software virus and worm attacks has also served to reduce the trust that is necessary for there to continue mutually satisfying interaction using this medium. The issue has even greater pertinence in the case of e-mail research, for the parties are often unknown to each other. When Internet Service Provider (ISP) AOL reports that it repels more than two billion spam e-mails in a single day, it is little wonder that response levels to e-mail are falling (Yates, 2003). Partially in response to Spam, instant messaging is increasingly being adopted to the chagrin of organisational IT departments. So too are collaborative solutions provided by organisations such as Groove Networks (Kotler, Brown, Adam and Armstrong, 2004).

While the current period has been called the era of addressability (Blattberg and Deighton, 1991), not all e-mail addresses of consumers in repertoire markets are known, thus giving rise to coverage errors. In the case of subscribers, the population or sampling frame is identifiable and contactable via e-mail. In the latter situation, and where the e-mail address remains current, the benefits of e-mail marketing research include low cost and the greatest speed of virtually all data collection techniques (Weible and Wallace, 1998). As McDonald and Adam (2003) point out, while a large proportion of e-mail addresses may be out of date, and even in subscriber markets, at least the technology enables researchers to establish that the e-mail has bounced back to the sender and therefore not reached identifiable respondents. Privacy is also an issue, as reports by the Australian Privacy
Commissioner indicate (Australian Privacy Commissioner, 2001).

As Hanson (2000) observes, two reasons for using the Web in marketing are to increase market coverage, and/or to increase productivity. The commercial use of e-mail enables both of these objectives to be achieved, with the caveat concerning the effect of replacement technologies reiterated here. Despite the qualified advocacy by some researchers (e.g., Opperman, 1995; Jackson and DeCormier, 1999; Dommeyer and Moriarty, 2000), issues abound in the use of the Web in marketing research. Some of these difficulties are overcome by use of HTML forms in tandem with e-mail.

Mixed Mode and Hybrid Mode

Schaef er and Dillman (1998, p. 381) use the term mixed mode to describe the situation where “researchers can begin with an e-mail approach and use progressively more expensive methods for nonrespondents until an acceptable response level is reached”. We have adopted the term ‘hybrid mode’ to describe the situation where either e-mail or postal invitations are used to pull the addressee to an online questionnaire which employs hypertext markup language (i.e., an HTML form) or to opt-in and receive a questionnaire by any mode. As Dillman (2000) points out however, mixed mode (and by implication hybrid mode) takes in a number of survey modes, and can give rise to respondents answering differently unless a unimode construction technique is adopted. Put simply, this means that the format and layout of a printed questionnaire is almost identical to the version seen online, despite the so-called enhancements Web technology allows.

It is Schaefer and Dillman’s (1998) experiment that in large part prompted this study. These researchers achieved the same response level with both postal and e-mail surveys of a sampling frame of Washington State University faculty members who, one presumes, were familiar with the researchers and the method employed. This point concerning use in range of studies of convenience sample and/or samples that are well versed in information technology has been highlighted by McDonald and Adam (2003).

| Table 1. Treatment Groups and Results of a Mixed Mode Marketing Research Experiment |

<table>
<thead>
<tr>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3</th>
<th>Group 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Paper</td>
<td>All E-mail</td>
<td>Paper Prenotice</td>
<td>Paper Reminder</td>
</tr>
<tr>
<td>Prenotice</td>
<td>Paper</td>
<td>E-mail</td>
<td>Paper</td>
</tr>
<tr>
<td>Letter and questionnaire</td>
<td>Paper</td>
<td>E-mail</td>
<td>E-mail</td>
</tr>
<tr>
<td>Thanks you / reminder</td>
<td>Paper</td>
<td>E-mail</td>
<td>E-mail</td>
</tr>
<tr>
<td>Replacement questionnaire</td>
<td>Paper</td>
<td>E-mail</td>
<td>E-mail</td>
</tr>
<tr>
<td>Response level (%)</td>
<td>57.5</td>
<td>4.0</td>
<td>6.2</td>
</tr>
<tr>
<td>Portion paper</td>
<td>54.0</td>
<td>42.0</td>
<td>46.5</td>
</tr>
<tr>
<td>Portion E-mail</td>
<td>56.6</td>
<td>69.4</td>
<td></td>
</tr>
<tr>
<td>Response quality (%)</td>
<td>59.8</td>
<td>69.8</td>
<td></td>
</tr>
<tr>
<td>(completing 95%)</td>
<td>10</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Open-ended Responses</td>
<td>(Average No. Words)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In the Schaefer and Dillman (1998) experiment, each of four groups received a pre-notice, a questionnaire, a thank you / reminder, and replacement questionnaire as shown in Table 1.

The mode of delivery was the only difference in that there was an all paper group, an all e-mail group, and two mixed mode groups where the third group received a paper pre-notice and thereafter e-mails. The fourth group received e-mails except for a paper-based thank you / reminder. The all paper and all e-mail groups achieved the same high response level of 58%, whereas the third group gained 48% response and the final group gained a 54% response. Moreover, e-mail open-ended questions generated responses averaging 40 words versus 10 words in the case of the paper version.

The matter of response levels and response quality raised by the Schaefer and Dillman (1998) study, and the issues concerning online data collection methods raised by McDonald and Adam (2003) and Dillman et al. (2001), as well as concerns that marketing practitioners may now hold jaundiced views of e-mail, also prompted this study. It is acknowledged that greater technological capabilities have been built into HTML Web form surveys since 1998 that raise their desirability as a research tool (e.g., Javascript is used to prevent item-skipping on scale questions and can also be employed to ensure that e-mail addresses are provided correctly). Arguably, these techniques may annoy some respondents, and further research is needed to ascertain their full effects. For example, does prevention of item-skipping result in some respondents withdrawing from an online questionnaire?

Research Aims
The present study was designed with the aim of analysing small business perceptions of hybrid e-mail and Web form surveys, and the more traditional postal survey mode. From the literature review, the following hypotheses were developed for testing:

H1: For small business, the probability of commissioning targeted e-mail/Web form surveys, is higher than the probability of commissioning postal surveys.

H2: For small business, the probability of commissioning non-targeted e-mail/Web form surveys is higher than the probability of commissioning postal surveys.

H3: For small business, the probability of commissioning hybrid postal/Web form surveys is higher than the probability of commissioning postal surveys.

H4: For small business, the probability of responding to targeted e-mail/Web form surveys, is higher than the probability of commissioning postal surveys.

H5: For small business, the probability of responding to non-targeted e-mail/Web form surveys is higher than the probability of commissioning postal surveys.

H6: For small business, the probability of responding to hybrid postal/Web form surveys is higher than the probability of commissioning postal surveys.

H7: For small business, the incidence of associating Spam and privacy issues, as measured by word count in open questions, is higher for e-mail and Web surveys where e-mail addresses are harvested from randomly selected websites than for postal surveys.

Method
In this study, a Web (HTML) form questionnaire was prepared containing four research scenarios as set out in Table 2. The scenarios differ in their description of the way in which the sampling frame is derived, and the questionnaire is delivered and returned. In Scenario One, a list of e-mail addresses of senior marketing decision-makers is purchased from a
reputable vendor, and the questionnaire is completed online. Scenario Two entails use of a list of non-targeted e-mail addresses drawn from public websites, with addressees invited to complete the questionnaire via the Web. Scenario Three entails a purchased list of postal addresses of senior marketing decision-makers who are invited to complete the questionnaire via the Web. Scenario Four involves use of a purchased list of postal addresses of senior marketing decision-makers, together with postal delivery, and return of the completed questionnaire in a reply-paid envelope.

The questionnaire was kept to a minimum number of items so as to intrude little as possible on respondents’ time and thereby optimise both response rate and response quality. For each scenario, five Juster scale questions (Brennan Esslemont, 1994) were employed, asking respondents to consider the probability of making such a purchase. While Juster Scale categories are shown in Table 2, for the online questionnaire, the scale items were presented horizontally. The approach taken was to keep the questionnaire similar to a printed questionnaire.

<table>
<thead>
<tr>
<th>Step</th>
<th>Scenario One</th>
<th>Scenario Two</th>
<th>Scenario Three</th>
<th>Scenario Four</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Hybrid commercial e-mail list of senior marketing e-mail invitation and Web form</td>
<td>Hybrid e-mail list from randomly selected sites, e-mail invitation and Web form</td>
<td>Hybrid commercial list of senior marketing managers, postal invitation and Web form</td>
<td>Commercial list of senior marketing managers, sent questionnaires by post, reply paid envelope</td>
</tr>
<tr>
<td>Invitation/Pre-notice</td>
<td>E-mail</td>
<td>E-mail</td>
<td>Post</td>
<td>Post</td>
</tr>
<tr>
<td>Questionnaire</td>
<td>Web form</td>
<td>Web form</td>
<td>Web form</td>
<td>Printed paper</td>
</tr>
<tr>
<td>Acknowledge-ment</td>
<td>Automatic at website</td>
<td>Automatic at website</td>
<td>Automatic at website</td>
<td>None</td>
</tr>
</tbody>
</table>

Table 3. Juster Scale

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
<th>Juster Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Certain, practically certain to buy</td>
<td>(99 in 1)</td>
</tr>
<tr>
<td>9</td>
<td>Almost sure</td>
<td>(9 in 10)</td>
</tr>
<tr>
<td>8</td>
<td>Very probable</td>
<td>(8 in 10)</td>
</tr>
<tr>
<td>7</td>
<td>Probable</td>
<td>(7 in 10)</td>
</tr>
<tr>
<td>6</td>
<td>Good possibility</td>
<td>(6 in 10)</td>
</tr>
<tr>
<td>5</td>
<td>Fairly good possibility</td>
<td>(5 in 10)</td>
</tr>
<tr>
<td>4</td>
<td>Fair possibility</td>
<td>(4 in 10)</td>
</tr>
<tr>
<td>3</td>
<td>Some possibility</td>
<td>(3 in 10)</td>
</tr>
<tr>
<td>2</td>
<td>Slight possibility</td>
<td>(2 in 10)</td>
</tr>
<tr>
<td>1</td>
<td>Very slight possibility</td>
<td>(1 in 10)</td>
</tr>
<tr>
<td>0</td>
<td>No chance, almost no chance</td>
<td>(1 in 10)</td>
</tr>
</tbody>
</table>

naire, thereby adopting a unimode technique. Such an approach has been used in a number of hybrid online and postal satisfaction surveys (e.g., McDonald & Adam 2003), and the use of drop down menus and other techniques favoured by some researchers (e.g., Parackal and Brennan, 1999) was avoided. An open text box was also provided for each scenario to solicit other comments, particularly in relation to perceptions of Spam, without leading respondents in the matter.

The questionnaire used in this study was pre-tested with marketing academics, as well as with marketing practitioners, and improved upon accordingly. Approval of the relevant university ethics committee was sought and gained.

The sampling frame comprised a panel of 343 small businesses developed and maintained by a major Australasian marketing research firm. An e-mail invitation was sent by the research firm inviting the nominated manager to complete an online (Web) questionnaire. Panel members used a unique password to gain access to the online questionnaire. Data submitted via the Web form interface was passed to a database and from there to Excel and SPSS for analysis.

Findings and Discussion
A response of 141 (41%) was achieved. Response quality is not considered to be high in that the proportion of respondents who completed open text boxes by scenario is 36%, 30%, 30% and 29% for the respective scenarios. However, as Couper (2000, p. 466) observes, “Survey quality is not an absolute but should be evaluated relative to other features of the design (such as accuracy, cost, timeliness, etc.).”. Certainly, the present study had a lower than usual cost due to access to an existing list, the use of an e-mail invitation/pre-notice, and minimal data collection costs through use of a self-administered online questionnaire linked directly to a database. Response times were fast with 68% of responses recorded within the first 48 hours. All responses were received by day 10.

For this sample of small business respondents, the probability of commissioning Scenario One (targeted email list and Web form) is not significantly higher than for Scenario Four (postal survey). As shown in Table 4, there is no statistically significant difference between the probabilities of commissioning the other two hybrid survey modes and the postal survey mode. That is, hypotheses one to three are not supported.

As might be expected, the majority of position titles were owner, director or CEO/MD (51%). While intuitively one might expect marketing functionaries to discriminate between the scenarios dif-

<table>
<thead>
<tr>
<th>Table 4. Comparison of Mean Probability Scores Between Scenarios: Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Would you commission such a research project?</td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>Scenario One</td>
</tr>
<tr>
<td>Scenario Four</td>
</tr>
<tr>
<td>Scenario Two</td>
</tr>
<tr>
<td>Scenario Four</td>
</tr>
<tr>
<td>Scenario Three</td>
</tr>
<tr>
<td>Scenario Four</td>
</tr>
</tbody>
</table>
Table 5. Comparison of Mean Probability Scores Between Scenarios: Respond

<table>
<thead>
<tr>
<th>Would you respond to such a research project?</th>
<th>n</th>
<th>Mean Probability Score</th>
<th>t</th>
<th>Sig.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenario One</td>
<td>141</td>
<td>5.5</td>
<td>3.99</td>
<td>0.00</td>
</tr>
<tr>
<td>Scenario Four</td>
<td>141</td>
<td>4.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scenario Two</td>
<td>141</td>
<td>4.5</td>
<td>0.06</td>
<td>0.96</td>
</tr>
<tr>
<td>Scenario Four</td>
<td>141</td>
<td>4.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scenario Three</td>
<td>141</td>
<td>4.1</td>
<td>-1.87</td>
<td>0.06</td>
</tr>
<tr>
<td>Scenario Four</td>
<td>141</td>
<td>4.5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Differently to small business owners, directors and other functionaries (e.g., finance specialists), a between group analysis based on position titles was not conducted, since only six respondents reported being marketing functionaries.

From Table 5 we see that there is a statistically significant difference in the probability of responding to targeted email and Web form survey over the traditional postal survey. However, there is no such significant difference between the other modes and postal surveys. That is, hypothesis four is supported, however, hypotheses five and six are not.

Turning to the word count of open textbox questions for each scenario, the mean count for each is as follows where non-responses have been held out: Scenario One – 21; Scenario Two – 18; Scenario Three – 18; and Scenario Four – 17. The word counts reported for the three Web form scenarios are therefore lower than the word count (40) reported by Schaeffer and Dillman (1998) in the case of email. The reported word count for the paper-based scenario is higher than that reported (10) by Schaeffer and Dillman.

Six respondents associated Scenarios One, Two and Scenario Three with Spam, but only one did so in the case of Scenario Four. Privacy is mentioned by one respondent in association with Scenarios One and Three, while the word illegal is used by another respondent in association with these scenarios. Thus, based on the word count in evidence there is little discriminative between non-targeted email (harvests from websites) and Web surveys, as the more traditional postal survey method.

Conclusion

There are limitations in this study, in that the main relating to the sampling frame of the questionnaire. In an endeavour to optimise response level, information on the composition of the panel and its representativeness was not obtained. This might be expected in the case of a sample of small businesses, few special marketing decision-makers are in evidence, and this may have led to a discrimination between the scenarios that might be the case if larger firms employing such specialists had been surveyed. The sampling frame is online oriented, email access was a precondition to the membership of the research company panel. This is also evidenced by the fact that all panel members use e-mail and the Web. This online orientation might have contributed to respondents' perceptions of email/Web form surveys. Future comparison of Web-using firms and non Web-using firms, and whether survey modes are employed, might bring forth better understanding of business perceptions of market research in this regard.
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Living with children: the subtle nuances of everyday observation – implications for market research

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Introduction

The influence of children on their parents, on their peers, and their purchasing power means that marketers with products aimed at children, either wholly or in part, have little option other than to conduct research among children (Cowlett 2001). Marketers initial interest is with ‘pester power’ and as children become older and have their own discretionary income, the interest is premised on the children’s development as self contained purchasers and consumers.

Product categories - children in developed markets are certainly avid consumers in a whole range of product categories including games, toys, soft drinks, fast food and snack foods, confectionery, movies, television programming, sports equipment, educational products, clothing, footwear, computer hardware and software, personal care products and cosmetics.

Scope of the paper - the starting premise of this paper is that ethnographic methods have much to offer in the conducting of children’s research in these product categories, but that such methods are seldom fully understood in their own right, let alone applied to the study of children as consumers. This paper’s primary focus is on ethnographic approaches as a way of generating data, rather than on the downstream interpretation and analysis issues.

Ethnography is one of a relatively new battery of tools in marketing offering assistance in the studying of consumers. Reflecting this ‘newness’ only a limited number of practicing market researchers are familiar with the ethnography’s potential marketplace applications. Yet it offers considerable potential in the conducting of market research on new products, brand communications and positioning products (Fellman 1999).

There is currently very little established literature on the application of ethnographic methods in commercial market research, let alone in the specialised area of children’s research. There are however some market research agencies that are applying ethnographic approaches in their research with children.

Defining Ethnography

Observation and communication - ethnographic methods are principally reliant on observation, and may be supplemented by communications with the subject(s) being studied. The latter are often used to provide the subject’s accounts of their own actions, and what lies behind these actions. Typically, observation and both directive and non-directive interviewing are the primary methods employed (Sherry 1990). They aim to capture behavior in real time and real space in naturalist environments. The context is in fact very important. As such ethnographic approaches are grounded in phenomenology.

Interpretation - the downstream interpretation is intuitive and is reliant on disciplined intuition. The contextual under-