QCA in empirical marketing research: An experiment featuring Dorah Explorah, investigating celebrity endorsement’s effect on product selection

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ABSTRACT

This study explains how to disentangle the relationships between outcomes and the configurations of marketing brand tactics and consumer attributes for a particular marketing phenomenon. We demonstrate that qualitative comparative analysis (QCA) can be implemented in marketing contexts, and that it can explain marketing phenomena to the standards of rigour, generality and complexity demanded by scientific research. Fuzzy set QCA (fsQCA) need not be feared; it can be a very useful case-based method for marketing theorists. The “thought experiment” featuring the hypothetical Dorah Explorah brand demonstrates fsQCA’s value and its similitude with real markets, and confirms that a single attribute, marketing tactic or condition can affect the examined outcome differently when it is part of a different configuration, although it may not be necessary or sufficient for the outcome by itself. We extend the literature on marketing theory creation by drawing on social psychology and management disciplines (for methodology) and Heider’s (1958) balance theory to propose a specific hypothesis. We then test this hypothesis via an experimental manipulation. We present the theoretical background supporting the study’s hypothesis and make a strong plea for marketing scholars to develop theories using truly useful, highly predictive asymmetrical logic. We hope that this paper will act as a tutorial for marketing researchers, novices and experts, making the application of fsQCA as a methodology and as a set of techniques easier and more transparent. We explicitly highlight the configurationally important aspects of qualitative research in empirical marketing studies and comparative scientific enquiry.

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1. Introduction

1.1. The call for rigorous, isomorphic marketing research

Research scholars advocate the advantages of asymmetric hypotheses, modelling and data analysis (Feurer et al., 2016; Fiss, 2011; Frösén et al., 2016; Hsu et al., 2013; Ordanini et al., 2014; Woodside, 2016, 2017; Woodside et al., 2016). De Villiers (2016) suggested that marketing theorists need to develop grounded theories, models and frameworks akin to the algorithm-based asymmetric-theory construction and testing by behavioural and management researchers (Armstrong, 2011; De Villiers, 2016; Feurer et al., 2016; Gigerenzer and Brighton, 2009; Ordanini et al., 2014).

Guided by the work of Armstrong (2012), Woodside (2016), McClelland (1998) and other management scholars (Gigerenzer and Brighton, 2009; Ordanini et al., 2014; Ragin, 1987), a Y-junction parting from the dominant linear and symmetrical research methodology works well to supplement theory-developing, empirical marketing studies with asymmetrical thinking and testing, to improve the usefulness, generality, accuracy and coverage of the resulting models.

Fiss (2007, 2011) highlights the problems inherent in symmetrical testing: the very large case sizes (big datasets common to current marketing and consumer data; n ≥ 1,000) are likely to indicate that almost all conceivable relationships are statistically significant (Armstrong, 2012); contrarian cases (those not fitting the suggested symmetrical or positive linear relationship between dependent and independent variables) that are normally ignored could be quite telling and make up as much as 6% of cases (Woodside, 2017); and asymmetric models are more accurate in predictive validity than symmetrical models, the latter being more accurate in fit validity. Thus, asymmetrical models are very useful in theory testing, forecasting and projecting, and provide the additional benefit of arriving at meaningful interpretations of causal patterns displayed in the marketing phenomenon, without vast data, but rather using in-depth knowledge of a small number of cases.

McClelland (1998) advises researchers to consider the following question: Does a model predict an outcome or dependent variable in additional samples – samples not included in the original datasets used to test the theory or models? In other words, does a model have “predictive validity”? Gigerenzer and Brighton’s (2009)...
study finds multiple regression analysis (MRA) models to be of extremely good fit, but these models perform relatively poorly when predictive validity is considered. Predictive validity is considered critical by Armstrong (1991) and Gigerenzer and Gaissmaier (2011). This requires little more from the researcher. Woodside (2010, p. 9) notes “Testing for predictive validity with hold-out samples is always possible and doing so substantially increases the added value for both empirical positivistic and interpretative case studies”.

2. Discussion

2.1. Why QCA will meet this call: background to QCA as method

In the world of empirical social research, QCA is a relatively new research approach and methodological tool. First introduced by Charles Ragin in 1987 (followed by two books in 2000 and 2008 and multiple articles, papers and workshops¹). QCA's popularity has increased. Today, proponents suggest that the inherent value of QCA is its ability to enable “systematic cross-case comparisons, while at the same time giving justice to within-case complexity” (Ragin, 2009, p. xviii). Several hundred published empirical studies (www.compasss.org) rely on QCA as methodology and as an analytical tool to rigorously compare intermediate numbers of cases (from four to hundreds), and the number of studies based on this continues to increase (Basurto and Speer, 2012). The vast majority of studies (Woodside, 2017) report on issues in organisational behaviour, political science, managerial development and business psychology.

QCA, as a research approach and method (set of data analysis tools), helps marketing researchers deal with the complexity of real-world marketing phenomena. “Configurational Comparative Methods paves the way for an innovative approach to empirical scientific work through a strategy that integrates key strengths of both qualitative (case-oriented) and quantitative (variable-oriented) approaches” (Rihoux and Ragin, 2009, p. x), as an epistemological approach. An example of the application of such an approach, and an experiment illustrating the method, is provided in Tutorial Example Boxes throughout the paper. (See DDFD Tutorial Example Box 1 to Example Box 22).

QCA considers phenomena in their complexity and anticipates asymmetrical associations between antecedent conditions (some antecedent conditions may be part of an experimental treatment and/or the context within which the phenomenon is studied and/or characteristics of the person or case studied) and the studied outcome(s) (Fig. 1). The advantage of QCA is that the analysis anticipates and allows for high values of the independent measure (say Y) to relate to high values of the dependent measure (say X as a simple or complex condition OR combination of conditions), and low values on the independent measure related to low values on the dependent measure (See XY- Plot 2A and XY-Plot 2B in Fig. 2).

In the terminology used by QCA proponents: in contrast to correlation analysis, multiple regression, and structural equation modelling (all of which assume symmetrical relationships between an

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¹ For a comprehensive list, see www.compasss.org.
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