

QUALIS? - FROM THEORY TO PRACTICE

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Abstract

Purpose of this Paper

The conventional distinction between quantitative and qualitative research is constructed around a familiar dichotomy. Within it, the former is construed as more 'factual' and 'objective' and it is contrasted with the more interpretative approaches of qualitative research. The latter, in this account, is enlisted to enhance understanding of the consumer even if it is considered inherently less reliable and less 'valid' in nature. In the following paper this familiar distinction is challenged and a more fundamental one is proposed in its place.

Approach

Qualitative research is conventionally understood within a framework delineated by modern psychology. The task of qualitative research within this model is to understand the motivations of consumers and to provide explanations that are deeper and less 'on the surface' than those elicited by quantitative methods. Such a perspective on qualitative research ignores the fact, however, that the distinctions which exist between the two methodologies are much more profound. We need to look at the underlying philosophical foundations of the two approaches and recognise that they can be distinguished at a more critical level. This paper will argue that they can be understood with much greater clarity in terms of how subjects and predicates are related to each other.

Findings

This reframing of the theoretical assumptions of qualitative research would lead, one might expect, to a radical reinterpretation of qualitative research. This paper goes on to demonstrate, however, that, paradoxically, this is not the case. What will be demonstrated is that some of the more important methodologies developed in qualitative research correspond precisely with the new theoretical model that is being put forward. As such, they tend to confirm the fundamental assumptions of the subject/predicate model proposed.

Originality/Value of the Paper

The value of this paper is to encourage greater theoretical perspective on the nature of qualitative research and its methodologies.

Paper type

This is a theoretical paper.

Keywords: *Brands, qualis, subject and predicate relationships, theoretical model*

Introduction – Subjects and Predicates

We all know the difference between a subject and a predicate. In the statement 'The cat is black' the subject in the sentence is 'cat' and the predicate is 'black'. Our entire understanding of the world around us is founded on such combinations of subjects and their qualities. But how, exactly, are subjects and predicates related to each other and what do these relationships tell us about the way in which we think about brands?

The Quantitative Model

For the past three hundred years or so there has been broad agreement on how subjects and predicates combine with each other. On the whole, most of us believe that there is an objective world 'out there' which is made up of objects in three dimensional space. It a form of reality that is independent of us and the way in which subjects and predicates are thought to combine is entirely derived from this assumption. Cats could have been orange or purple; they could have had six legs or two heads and it is only through our experience of cats that we discover that, *in fact*, they have four legs, one head and are often black in colour. Our experience gives us empirical knowledge about how predicates are *actually* combined with their subjects in the world around us.

At the very basis of this approach to knowledge is an underlying theoretical assumption that there are in the world no *necessary* links between subjects and predicates. This means that we must begin an exploration of any potential subject matter with this implicit assumption in mind. We can then increase our empirical knowledge of the subject by discovering how they are, in fact, combined in reality. At a more systematic level, this is the underlying approach of all of the physical sciences. They set about understanding the world by counting the incidences between particular phenomena and by identifying the incidences which exist between them. Frequently this is carried out using statistical techniques. Through this process we can distinguish those connections which are 'necessary' from those that are merely 'incidental'. This is how the nature of the objective world is ascertained and our objective knowledge of it established. Key to the process is the procedure of counting incidences; this is why they are called 'quantitative' sciences. The term derives from the Latin 'Quanto? – How many?

If we describe how this model of human knowledge works in diagrammatic terms, it would conform to the pattern of side tabs and cross tabs (figure 1a) that characterises any set of quantitative data. This underlying structure is fundamental to the physical sciences and is entirely familiar to us in the arena of quantitative market research. It is a structure founded upon the concept of incidence. If we consider any set of quantitative market research data it tends to follow this pattern.

For example, we can have attributes down the vertical axis of the data set and the factors we wish to analyse them by along the horizontal one (figure 1b), or vice versa.

Figure 1a:
The Quantitative Mindset: Subject/Predicate Relationships as 'Incidence'

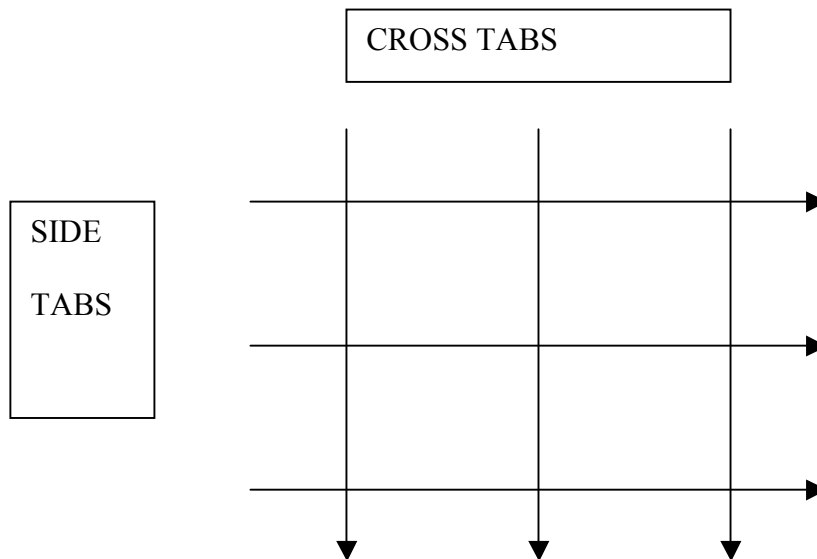
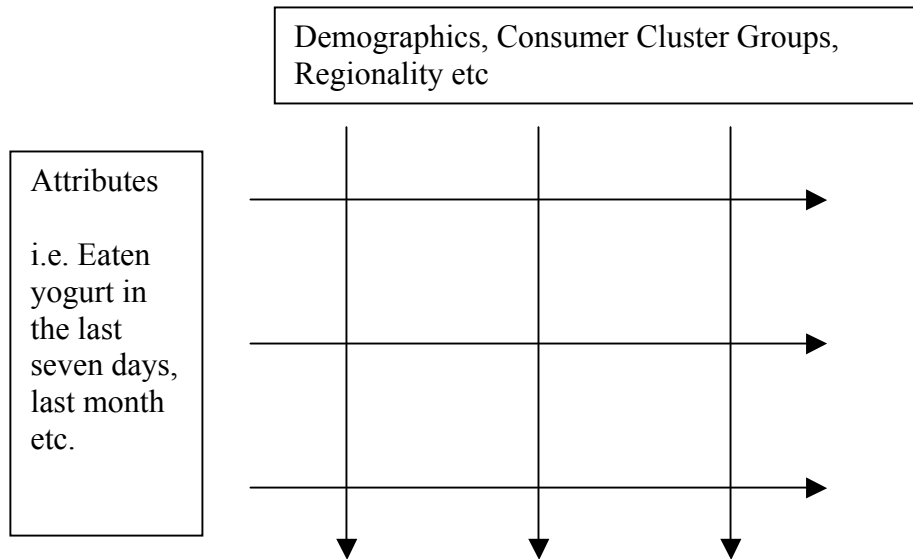


Figure 1b:
The Quantitative Mindset: Subject/Predicate Relationships as ‘Incidence’
(an example)



What we must recognise, of course, is the extent to which this way of thinking is culturally embedded in our ways of analysing about almost everything we encounter in the world. If we think about the causes of childhood obesity, or the reasons of crime levels in inner city areas, we instinctively look for the *incidences* of other factors which might be involved in these phenomena. This way of thinking about subject/predicate incidence is simply *how we assume reality works*. We bring it to our analysis of not only subject matters in the physical sciences, but also in sociology and psychology as well. It forms the underlying *mindset* that we bring to bear in our quantitatively orientated culture.

Over the last few centuries, this methodological approach has become the gold standard in defining how ‘objective’ knowledge is achieved. It has become firmly enshrined within the world of the physical sciences and it now sets a benchmark to which the social sciences, including the ‘marketing sciences’, aspire. To quote Rorty:

“In our culture, the notions of ‘science’, ‘rationality’, ‘objectivity’ and ‘truth’ are bound up with one another. Science is thought of as offering ‘hard’, ‘objective’ truth: truth as correspondence to reality, the only sort of truth worthy of the name. Humanists – for example philosophers, theologians, historians and literary critics – have to worry about whether they are being ‘scientific’ and whether they are entitled to think of their conclusions, no matter how carefully argued, as worthy of the term ‘true’. We tend to identify seeking ‘objective

truth' with 'using reason' and so we think of the natural sciences as paradigms of rationality. We also think of rationality as a matter of following procedures laid down in advance, of being 'methodical'. So we tend to use 'methodical', 'rational', 'scientific' and 'objective' as synonyms"

(Rorty: 1991)

Confronted with this desire to mirror the theoretical template of the quantitative sciences, qualitative research finds itself in an awkward position. Not sure exactly how it is different from the quantitative model at a deeper theoretical level, it tends to assume that objectivity and 'scientific' rigour are things to which it should aspire. Many commentators in qualitative research feel the need to establish such a platform particularly keenly. As a result, they seek ways in which we can take the 'subjectivity' out of qualitative research. The academic literature is full of well argued papers attempting to do precisely this. And, alongside this, qualitative research has been under considerable pressure to find ways of justifying the use of small base sizes and to establish the theoretical grounds for its validity (Sykes: 1990).

The Reality of Brands

But is this methodological template, and approach to knowledge, appropriate for a qualitative investigation of brands? Are brands the sorts of things which are objective, independently existing entities that behave in such a way that we can accurately count the incidences of their subjects and predicates? Do they possess the same characteristics as objects in the physical sciences? In short, are we right to apply our culturally determined template of analysis to things such as brands?

The answer to these questions is clearly, and emphatically, no. A moment's reflection will show us that brands are relational in nature. This is to say, they cannot be detached from their context. They cannot be isolated and placed under controlled conditions in a way that their relationships with the world can be neatly counted and quantified. This is because their very properties and attributes depend upon their context. Change the context of a brand and its predicates will change as well. The consumer's perception of a brand is thus entirely determined by his or her experience of it - where they find it, how they use it, what advertising and other marketing activity they have encountered from it and the competitive set in which they place the brand. Brands are, in the words of Stagliano and O'Malley, entities which are defined by the multi-dimensional nature of their relationships:

"A brand is as a brand does, and what it does is an experience of irreducible complexity – multidimensional, multilayered and often polysensual"

(Stagliano and O'Malley: 2002)

None of this, of course, stops the juggernaut of marketing theory from wanting to establish its 'objective' credentials. Motivated by the need to mirror the paradigm of the physical sciences, quantitative market research finds a way of avoiding this potential problem by simply asserting that a brand is a 'name', or a concept, in the mind of the consumer which has certain associations (i.e. incidences) linked to it. It can then set about the process of counting the incidences that a brand possesses and how these vary across different demographic, geographic or attitudinal groups. To take an example, we can count how many people think Coca Cola is 'American', 'refreshing' or 'youthful' and how these 'scores' correspond to other variables. The brand can thus be treated in a way that fits very easily with our cultural disposition towards analysis. Although such measurements are based on the subjective opinions of respondents, we feel we are analysing Coca Cola through a process which is relatively objective and maybe even 'scientific' manner.

The only problem is that in moving to this way of thinking about brands – as names, or concepts, which *have incidences* rather than as entities which are *defined by their relationships with the world* – we have fundamentally obscured the nature of what a brand is. This shift has the effect of denying the 'polysensual' aspects of brands and rendering them much more one dimensional. And, in this process, we transform the relational nature of brands into *sets of attributes that brands possess* rather than seeing these values as *the very things which determine what a brand is*. And much bad marketing, and marketing theory, stems from this mistake.

Subjects and Predicates: Inclusion not Incidence

But is there a more appropriate way to think about the relationship between subjects and predicates which reflects the true nature of brands as contextually determined entities? Is there a model for thinking about these two constituent elements of human knowledge in a way that actually recognises the relational characteristics of brands rather seeking to deny them?

Prior to the seventeenth century scientific revolution such a subject /predicate model existed. In a world that was founded on the concept of essence, the relationship between subjects and predicates was thought about in quite a different manner. It represented a model of the world that was swept away with the rise of quantitative science, but it was a view of how reality is constructed that was fundamentally relational in nature. As such it would seem to offer an alternative model for thinking about brands.

The pre-moderns conceived of the world as a 'text' written by God the Creator and, in the words of Foucault (1970), they sought, therefore, to understand the 'Prose of the World'. As such, it was assumed that all subjects and predicates were ultimately connected to each other, however remote this connection might be. The reason that these connections existed was because everything in the world was fundamentally the result of the same creative act; it was part of the same fabric of Creation. In our quantitative

model we saw that our initial assumption is that subjects and predicates are not connected and then we look for the ways in which they actually are so. The pre-modern model starts with *exactly* the opposite assumption – assuming everything is connected and then seeks to identify the nature of the connections.

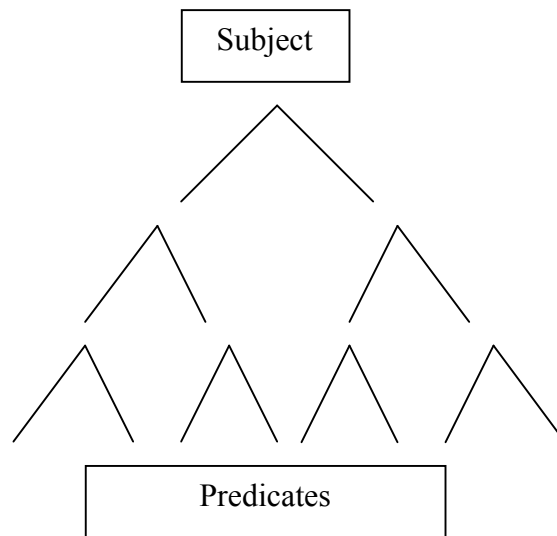
We do not need to dwell on the details of this historical perspective. For our purposes, however, such a vision of the world led to a fundamentally different approach to subject/predicate relationships. Subjects and predicates were not related to each other by *incidence*. They were related to each other by *inclusion*. This mindset led to quite different interpretations of truth and meaning compared with the ones with which we are familiar. They were most famously expressed by Leibniz in his claim “*Predicates are contained within their subject; otherwise I do not know what truth is*” (Leibniz: 1676-87), but his was a view and a mindset that was common throughout pre-modern thought.

So what did this mean? When a pre-modern observed a cat with four legs this was not seen as a case of mere incidence. Rather it was a *demonstration that ‘four legged ness’ was, included in the concept of ‘cat ness’*. Such an observation could then make a small, but significant, contribution to our understanding of the definition, or essence, of what it was to be ‘cat’.

Within this model the nature of any phenomenon is thus defined by the nature of the predicates that are contained, or not contained, within its concept. Within any concept there are many other elements or values. These are structured in a hierarchical manner. Some are more important and are positioned higher up the hierarchy of the concept and others are less important and are positioned towards the lower levels of it. As such, the latter form a much smaller input into the nature of the concept; but still contribute, in a small way, to its meaning. Very importantly, however, they were still there; reflecting a more distant relationship that feeds into the overall constitution of the phenomenon in question. The essence of any particular subject, so defined, becomes *the sum of its relationships with the world*.

In diagrammatic terms, this model of subject /predicate relationships is illustrated below (figure 2); and it is a radically different one from the outlined in figure 1. Within this model, subjects contain predicates and these values, in turn, contain further predicates. The meaning of a concept is thus determined not only by the predicates which it contains, but also by the way and the order in which they are structured. This also has the effect of transforming how we think about our knowledge of the world. No longer are we in the business of counting incidences and looking for statistical significance. We are, in contrast, seeking to understand concepts and how they are structured.

Figure Two: Subject/Predicate Relationships as 'Inclusion'



Readers may recognise the parallels that exist between this model and the theories of Structuralism. The latter is an analysis of language, and the underlying structure of language, whilst the pre-modern approach represents a more fundamental analysis of reality. The connection, however, which exists between them is founded on the pre-modern assumption that reality, itself, is a text. Eco, in his account of pre modern aesthetics, identifies this convergence very clearly:

“Structuralism can find not a little of its ancestry in the scholastic ‘forma mentis’: for instance, there is the structuralist claim to be an interdisciplinary discourse, its claim to be a kind of universal logic, its claim to reduce all human sciences to a single master science (linguistics according to structuralism) which the other sciences follow. All of this is Scholastic. And Scholastic thought, for its part, has two characteristics which connect it with structuralist thought: it proceeds by way of binary definitions....and it thinks synchronically”

(Eco: 1988)

And Barthes, explaining the structure of narrative in a text, uses the same framework of a hierarchy of values. The only difference between the pre-modern model and his analysis of a literary work is that the former text was also construed as being reality itself:

“There can be no doubt that narrative is a hierarchy of instances. To understand a narrative is not merely to follow the unfolding of the story, it is also to recognise its construction in ‘storeys’, to project the horizontal concatenations of the narrative ‘thread’ on to an implicitly vertical axis; to read (to listen to) a narrative is not merely to move from one word to the next, it is also to move from one level to the next”

(Barthes: 1977)

Returning to a marketing context, we can see how this works more clearly in relation to a brand – and it is of considerable significance that in marketing circles we often think of brands as essences and, when analysing them, tend to structure them in hierarchical terms.

If we take the concept of ‘Coca Cola ness’ we know that it contains the concept of ‘Americanness’. This part of its definition is, for most consumers, very much higher up the hierarchy of the brand than the fact that it is, for example, something that is ‘found in pubs’ or ‘is advertised on television’. All of these values are ingredients of the brand and feed into a determination of its brand structure. But it is *where they are positioned in the brand structure* which then determines the nature of what the brand is ultimately about. This means that what can be called the ‘propositional hierarchy’ of a brand is fundamental in determining how consumers perceive it. To take some examples:

- Lloyds TSB is a high street bank which has telephone banking. First Direct is bank which is a telephone bank. ‘Telephone banking’ is in a different and more important place within the latter’s propositional hierarchy.
- Peeterman Artois has been launched in the UK recently as 4% ABV lager. Do consumers see it as a continental lager that is lower strength (a function of its Stella Artois heritage) or a premium version of a lower strength lager such as Fosters or Carling? (i.e. a 4% lager which has more added value?) Is the brand leading with continental heritage or 4% values? Propositional hierarchy will determine its ultimate positioning.

So in terms of understanding a brand we need to carry out two separate, but interrelated, activities. Firstly, we need to identify what values *are contained within its concept*. And, secondly, we also need to gain an understanding of how these values are *structured in hierarchical terms*. These two questions demand a very different methodological approach to the quantitative one of simply counting the incidences between subjects and predicates.

It could be argued, of course, that quantitative research already does this kind of analysis in laddering exercises etc. These, however, are not the same as the approach that is being proposed here. Laddering, as a research tool, counts the importance of particular values for a brand or product. In contrast, identifying propositional hierarchy is an attempt to understand *how a consumer understands a brand* and the conceptual framework in which they construe it.

Qualis?

How does this way of thinking about subject/predicate relationships find expression in the methodologies that we use in market research? If the quantitative model is based on the idea of counting incidences, then this new

model is founded on the notion of understanding *what sort of thing* something is. This is achieved by grasping what is contained, and not contained, within its particular concept or definition. The Latin stem that we should turn to is the word 'Qualis?' – What sort of? – and it forms (or certainly should form) the foundation stone of qualitative research practice.

When we try to understand the nature of a brand we need, in this interpretation, to understand which predicates are included within the brand, which ones are not included in the brand and, thirdly, to begin the process of identifying how they are structured. Central to these tasks is the procedure of splitting a concept into its component parts and understanding what values and elements it contains. If we look for an articulation of this approach we find it, again, in Leibniz; he argues that we should proceed in the following way:

“The art of discovery consists of the following maxims:

- 1) *In order to become acquainted with a thing we must consider all of its prerequisites, that is, everything which suffices to distinguish it from any other thing. That is what is called definition, nature, essential property.*
- 2) *After we have found a means of distinguishing it from every other thing, we must apply this same rule to the consideration of each condition or pre-requisite entering into this means, and consider all the prerequisites of each prerequisite. And that is what I call true analysis or distribution of the difficulty into several parts.*
- 3) *When we have pushed the analysis to the end, that is, when we have considered the prerequisites entering into the consideration of the proposed thing, and even the prerequisites of the prerequisites, and finally have come to considering a few natures understood only by themselves without prerequisites and needing nothing outside themselves to be conceived, then we have arrived at a perfect knowledge of the proposed thing.”*

(Leibniz: 1693)

This schema for subject/predicate relationships opens up an entirely new way of thinking about what we do in qualitative research. Conventionally, we view the qualitative research approach as one that is designed to uncover the *psychology* of the consumer. It is designed, we believe, to uncover the deeper and more profound aspects of consumer motivations. It is a market research tradition that finds its roots in the Freudian tradition of the psychoanalyst's couch. What is being suggested in this paper, however, is that qualitative research can find its theoretical identity in other directions. It is designed to understand how subjects and predicates are contained within each other and, as such, it is optimally suited to understand the structure of essence and, in particular, in a commercial setting, the structure of brand essence.

This transforms how we think about the credentials, and the very intent, of the qualitative research process. No longer do we need to establish the 'objectivity' of our subjective analyses of other people's subjectivities (this is the corner that qualitative researchers are frequently forced into). Instead, we have now created a platform upon which we can assert our own research credentials. We have identified a specific research task for ourselves – one of building up our qualitative understanding of essence. In this transformation we are repositioned. We become qualitative analysts, using consumers to help us explore the nature of particular essences, rather than qualitative researchers who simply interview consumers about their individual and subjective opinions.

Practice: Methodological Implications

How does this affect our understanding of qualitative research methodology? We might expect that this new theoretical approach to subject/predicate analysis would demand an entirely new way of conducting qualitative research practice. The paradox, however, that confronts us at this point is that some of the most effective methodologies that have been developed for understanding brands are based upon *the very perspective* on subject/predicate relationships that we have been discussing.

This has not happened by accident, of course, and it does not seem to have occurred because of any deeper understanding of the philosophy that we have been outlining. It has happened because these methodologies *have been seen to work* when researching brands; and they have done so because they are ideally suited to understanding brand essence and its structure. Let us, briefly, take three examples of the techniques that researchers employ in the commercial qualitative research profession.

Brand Mapping

At one level a mapping of packs, or brand names, in a group discussion can be seen as an attempt to understand how a market is structured or, at another level, how it is structured in the subjectivity of a particular type of consumer group. We may find, for instance, that the way in which teenage girls structure the carbonates market is different to the way that their mothers or fathers do. These are our conventional ways of understanding the process of mapping a market and they are in line with the view that we are employed as qualitative researchers to understand the subjective dispositions of the consumer.

The mapping process can also be seen, however, as a concerted attempt to split a concept in line with the subject/predicate analysis that we have been discussing. When we ask a group to conduct a mapping exercise of the carbonates market we are effectively asking them to split the concept of 'carbonateness'. The brands, and their packaging, are merely there to help consumers identify the types of values that this particular 'ness' contains. Once the mapping is completed we can talk about the different groups of

products and brands that have been created and ask consumers to explain *what sorts of values* are present in each sub group. *What sorts of values* does a brand need to own in order to place it in a particular pile and *what sorts of values* must it not possess? Once we have identified some of these values we can go on to ask consumers *what sorts of factors* are required to create these and on what other value systems do they depend? Additionally, in brand extension studies, we can explore *what sorts of values* a brand would need to gain, and *what sorts of values* it would need to lose, in order to move it from one sub sector to another.

In all of this discussion what we are doing is splitting the concept of 'carbonateness' into its component parts and then identifying what values, in turn, these elements contain. It is as if we are creating a pyramid (similar to the one in figure two) in the group discussion and asking consumers to explain to us what layers are intrinsic to its composition. We are conducting, as a result, a Leibnizian analysis of the market 'concept' by breaking it down and then asking the underlying question 'qualis?' on a systematic basis.

Mood Boards

These are commonly used by commercial qualitative researchers to understand the meanings of concepts and brands. Any concept or brand will have values contained within it that we have no words for. All the words used by consumers, or presented to them in brand propositions, are effectively 'fatwords' (Gordon: 1999) – words that are juggernauts of meaning that simultaneously signify both more than we want to mean, but also less than we want to mean (Eagleton: 1988). The consumer cannot help us define them more precisely at a verbal level because they, too, lack the language to explain the nuances of the concepts that we are discussing.

Respondents are, however, able to *recognise* the differences between expressions of particular concepts if we show them visual representations of the word we are trying to unpick. They do not possess a word that captures the exact 'softness' of Lenor or the specific 'Irishness' of Guinness, but they may be able to identify them if we show examples to them and, just as importantly, tell us what sorts of softness and Irishness these respective brands do *not* possess. Using mood boards, it is possible for consumers to do precisely this. A mood board presents about twenty or thirty images of a particular concept and we can ask consumers to identify *what sorts of image* are closest to a brand. Often, the consumer cannot articulate them directly, but they are able to choose pictures that seem to convey them. In theoretical terms, what we are doing on these occasions is taking the brand, or concept, that we are discussing and then splitting it by showing consumers images of different potential manifestations of it. The consumer can then indicate to us, more precisely, *what sort of values* they are seeking to identify or articulate. They can do this even though the words that they are seeking do not actually exist in the language.

Adjectival Sorting

Another technique is the use of adjectival sorts to elicit the values associated with (or rather contained within) a brand or a pack etc. Usually three or four brands, or designs, are shown to consumers in a group and they are asked which adjectives go with each. On some occasions, of course, consumers find this difficult. With the adjectival 'male' they are often at a loss, for example, to tell the moderator whether it goes more with Fosters, Carling or Carlsberg. The answer, of course, is that it does go with all of them. The simplistic response to this is to ask respondents which is 'more' male (such an insidiously quantitative question!). The real questions that should be asked, however, are these; '*What sort of male is Fosters?*', '*What sort of male is Carling?*' and '*What sort of male is Carlsberg?*' Again, there is unlikely to be a word that specifies exactly what sort of maleness each brand possesses. We are just stuck with the word 'male'. But by exploring what the word can mean in each instance we can get closer to what the consumer is trying to tell us about each brand and what values it contains.

Conclusion

Marketing science and marketing research, in particular, tend to assume that we should aspire to a model of knowledge that has been passed down to us by the physical, quantitative, sciences. Many academic books on qualitative research amount, as a result of this, to concerted attempts to shoe horn qualitative methodologies into this particular theoretical pigeon hole. This has led to demands to justify qualitative validity, concerns about the representativeness of qualitative sampling and the small base size issue.

In the course of this paper we have considered some of the theoretical foundations of the quantitative model and shown how they are applied, with limited success, to the exploration of brands. The effect of this way of thinking is to reduce brands (mistakenly) to 'names' that have associations in our minds rather than entities that are the sum of their relationships with the world. Although this approach gives us information about what consumers think, it also hinders our understanding of brands because it fundamentally leads to a distortion of what sorts of things brands are.

In the course of this paper we have discussed a different way of thinking about brands and have rooted this in an alternative model of framing subject/predicate relationships. This new model is based on the pre-modern way of understanding essence and reflects, in a very positive and enriching way, the contextual and relational aspects of brands. It also mirrors the underlying methodological approach of qualitative research – that of asking the question 'what sort of?' (qualis?).

If we follow this analysis we should be confronted by a paradox. On the one hand, we are forced to reappraise our conventional ways of thinking about the theory of qualitative research. On the other, however, we should expect to find that our conventional methodologies need to be abandoned in favour of

new approaches. But what we discover is that many successful techniques that we have already developed, in the absence of any underlying theory, parallel this new model very directly. This is, course, because they are the ones that work. And this, in turn, suggests that the framework being proposed in this paper is an appropriate way to think about brands. The proposition that subjects and predicates are related by inclusion, rather than by incidence, thus forms (or should form) the very cornerstone of qualitative research practice. It represents the point of convergence between the potential subject matter of brands and the qualitative research practice we use to understand them.

What we have in this analysis, therefore, are three specific strands of thought. The first of these has contrasted the way in which quantitative and qualitative methodologies analyse a subject matter. The second has looked at how brands are structured as essences. The third argument, however, has brought these two lines of thought together. We have identified that the research approach entailed in the qualitative mindset maps precisely onto the structure of essence that it is designed to analyse. We thus have a theoretical model that parallels, in qualitative form, the fit which we have seen to exist between our conventional vision of the world (which is made out of objects) and the demand we feel for 'objectivity' within the quantitative paradigm.

Once this insight is grasped, we can see both why qualitative research is so good at understanding brands and also why it is, despite this, still subject to methodological criticism. In judging qualitative research using an inappropriate model we are asking it to conform to a view of the world which utilises a different vision of subject/predicate analysis. And it is this which seems to undermine the validity of qualitative research rather than any inherent weakness in the methodology itself.

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