

Understanding How People Think: Using Research Principles in Qualitative Research Design

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Researchers are always thinking about how people think, even when we don't realize it. Whether it is explicit or implicit in our work, we are considering how people think from the very beginning (the conceptualization of research design) through to the very end (the analysis and interpretation of research findings).

Everything we do, really, is about matching research techniques, question design, fieldwork protocols, data coding, and final analysis with the reality of how people think. Will people be more forthcoming regarding sensitive issues in an online survey than a telephone interview? Do people respond differently if we ask a question about "gay men and lesbians" versus "homosexuals"? Will respondents or potential focus group participants self-select out of a study if the interviewer inadvertently mentions the controversial nature of the interview in the first moments of the introduction? How are the coders interpreting open-end comments? Will one coder code "I would like more pulp in the orange juice I buy" as "need to improve quality," or as "need to improve taste," or will they create a new code specific to pulp? And, when the data or discussions/interviews are ready for analysis, how do we translate the integration of various aspects of the findings into usable next steps for the end-user?

Quantitative researchers have openly discussed how people think for some time. Tourangeau, Rips, & Rasinski (2000) and Sudman, Bradburn, & Schwarz (1996) are just a couple examples of researchers who have written extensively on cognitive psychological principles related to survey methods. But I am left wondering, "Where are similar treatises in the commercial qualitative marketing research world?" If cognitive principles and the concept of validity apply in the quantitative realm, then surely they apply to the rich, in-depth studies of qualitative research.

Cognitive Process

Cognitive-process theories are as relevant and important to qualitative marketing research as they are to quantitative. For example, let's look at optimization¹ and satisficing¹ as it relates to the presentation of stimuli in a focus group context. Tourangeau et al., (2000), and others, have espoused a basic four-step cognitive-process model to discuss how research participants respond to questions optimally: 1) interpreting the question to deduce its intent; 2) searching the memory for relevant information; 3) integrating that information into a judgment; and, 4) translating that judgment into a response. The fact that focus group and other qualitative studies typically involve a limited number of stimuli and moderator guides are designed to take participants through this cognitive process by motivating thoughtful responses, strongly argues for the idea that optimization, not satisficing, is at play in these research settings. Similarly, the likelihood of research participants opting for a response that

¹Optimization and satisficing refer to the extent respondents "perform the necessary cognitive tasks" to answer research questions. In the former, respondents exert the effort to thoroughly comprehend and weigh response choices in order to select the optimal answer; in contrast, respondents who satisfice "may compromise their standards and expend less energy...Instead of generating the most accurate answers...[they] settle for merely satisfactory ones." [quoted statements taken from Krosnick, J.A. 1999. Survey research. Annual Review of Psychology, 50, 537-567]

is "good enough," or satisficing, is greatly reduced. Applied to the use of concept boards and other stimuli in focus groups (for example), one could argue that primacy and recency effects are irrelevant in focus group research and, while randomizing the presentation order of stimuli is de rigueur in quantitative; not so in qualitative. To the contrary, randomization in qualitative research just adds another layer of variability, further confounding the results and increasing the complexity of analysis.

Validity

Let's take this discussion one step further to include validity. If all research is essentially about the discovery of how people think, then we have to admit that our research designs are susceptible to any number of measurement errors. We cannot talk about measurement error without touching on (in some way) the construct of validity. Although the idea of validity is not typically uttered in the same breath with qualitative research, the underlying goals – trustworthiness, quality, dependability – are germane to all research methods. William Trochim at Cornell University, among others, has discussed the reluctance among qualitative researchers to accept the notion of validity, in large part because they reject the belief that there is a truth or reality by which participants' attitudes and behavior can be judged.

But there certainly is a truth or reality associated with elements of qualitative design that can be judged and is a necessary component to the integrity of our efforts. As one example, the focus group moderator has control

of question administration because questions can be probed for clarification, and misinterpretations (or unintended interpretations) of questions can be unearthed on the spot. This ability enables the researcher to realize the true meaning of questions asked, understand the alternative interpretations, and thereby add greater veracity and transparency into the design. Indeed, question-answer validation is a key strength of qualitative research, especially face-to-face designs that maximize the probing function. Not unlike the cognitive interviews incorporated in many quantitative designs, qualitative research can measure the validity of questions by uncovering how people formulate answers.

Qualitative researchers understand the important role of validation and exploit their ability to validate questions as well as answers, particularly when the research is being conducted face-to-face or via telephone. However, what about online research; where communication with a computer or mobile-phone screen has the potential to further alter, not only the researcher's ability to validate responses, but the participant's response as well? Computer-mediated communication, online impression management, and self-presentation tactics are just a few of the concepts often discussed in conjunction with how someone communicates (voluntarily or otherwise) via the electronic medium. Although the near silence in the marketing research community concerning computer-mediated communication is a bit deafening, it is encouraging to see MarketTools' TrueSample, and other initiatives, designed to address online respondent fraud.

Validation in social media research is difficult but it would be useful for social media researchers (corporate side and consultants) to entertain the ideas espoused by those in communication studies, psychology, computer science, and other disciplines that examine online behavior and attitude formation. For example, Jenny Rosenberg^a and Nichole Egbert^a discuss in their study, the "self-presentation tactics" that Facebook users employ to maintain a particular impression on their intended audience.

And Stephanie Rosenbloom^b, in her New York Times article, "Putting Your Best Cyberface Forward," references a variety of sources, including Mark Leary, a psychologist at Duke, who studies impression management and explores the images people choose to create (of themselves) in the online sphere.

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Online Research and Social Desirability

All of this brings us to the ever-present, what-are-people-really-thinking design issue of social desirability. Like computer-mediated communication, researchers who design online studies have generally ignored the potential bias due to factors of social desirability, with the belief among some that one of the beauties of the virtual world is that inhabitants basically live in solitude, away from the influences of a social reality. However, a good case can be made that the Internet and online technology have unleashed a dynamic capacity for posturing and the need for approval. Popularity and even celebrity – so elusive to the everyday person in earlier times – have become preoccupations. You only need to witness the apparent race for Facebook friends, LinkedIn connections, Twitter followers, and YouTube or blog views (as well as the "vanity" online self-publishing craze), to gain some insight into the potential competitiveness, i.e., pursuit of social stature fueled by the realm of online. In this way, the virtual social environment has encouraged a look-at-me way of thinking and behaving.

How real are those at-the-moment snippets transmitted by mobile research participants (which may be meant to impress the researcher more than inform)? How honest are those product reviews or blog comments? What is the extent of bravado being exhibited in our online communities, bulletin boards, and social network exchanges? The answer is, we don't know; and yet it doesn't take a great leap of faith to acknowledge that the individual attitudes and behavior we capture online are potentially distorted by an underlying need for social approval. Indeed, online researchers are strapped with the daunting task of understanding

how people think and who they choose to become in the virtual social context.

Conclusion

All marketing research is aimed at discovering the reality of how people think. Both qualitative and quantitative research adheres to research principles that serve to maximize our ability to

determine how people think with some level of confidence. While these principles and design issues are frequently examined

and openly discussed among quantitative researchers in various marketing research publications and associations, corresponding public methodological discussions concerning qualitative research are relatively few.

Like quantitative, qualitative methods of all types deserve ongoing questioning and inspection that contribute to an increasing level of confidence – among researchers and their clients – that we have come closer to understanding how people think.

Sudman, S., Bradburn, N., & Schwarz, N. 1996. *Thinking About Answers: The Application of Cognitive Processes to Survey Methodology*. Jossey-Bass Publishers.

Tourangeau, R., Rips, L., & Rasinski, K. 2000. *The Psychology of Survey Response*. Cambridge University Press.

^a Rosenberg, J. and Egbert, N. (2011), Online Impression Management: Personality Traits and Concerns for Secondary Goals as Predictors of Self-Presentation Tactics on Facebook. *Journal of Computer-Mediated Communication*, 17: 1–18. doi: 10.1111/j.1083-6101.2011.01560.x

^b <http://www.nytimes.com/2008/01/03/fashion/03impression.html?pagewanted=all>

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