Contexts, Constructs, & the Human Condition: Grounding Quantitative with Qualitative Research
Selected Articles from *Research Design Review* in 2014

Margaret R. Roller

Research Design Review – http://www.researchdesignreview.com – is a blog that was first published in November 2009. RDR currently includes more than 110 posts concerning quantitative and qualitative research design issues. This paper is a compilation of four selected articles that appeared in RDR in 2014 pertaining to ways survey research can be "made whole" with a nod to the use and/or sensitivities of qualitative research. It is the role of qualitative research to unlock the human condition in our research by providing the context and meaning to constructs that define what is being measured. Without a direct or underlying qualitative research component, how is the survey researcher to understand – be comfortable in the knowledge of – his or her analysis and interpretation of the data? These four articles emphasize the challenges survey researchers face when they ask about vague yet highly-personal constructs – such as "the good life," "happiness," "satisfaction," "preference," or the idea of "actively" incorporating "fruits" and "vegetables" in the diet – without the benefit of context or meaning from the respondent, or at least a concise definition by the researcher.

Roller Marketing Research

www.rollerresearch.com

rmr@rollerresearch.com

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Feelings & Sensations: Where Survey Designs Fail Badly

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Survey research is pretty good at allowing people to describe "things" in such a way that the researcher winds up with a fairly accurate idea of the thing being described. The most straight-

forward example is a survey question that asks, "Which of the following features came with your new Toyota Corolla?" followed by a list of possible features. However, survey research can also get at descriptions of more experiential phenomena with questions such as, "On a scale from '1' to '5', how does each of the following statements describe your experience in buying a new home?" In these cases, the use of survey methods to research a great number of people, and

compile and report the data as efficiently as possible, make good use of closed-ended questions to gain an understanding of respondents' accounts of the "things" of interest. This can also be said of beliefs. Pew's recent survey pertaining to the Christmas story that asked, "Do you believe that Jesus Christ was born to a virgin, or don't you believe this?" is just one example of how a closed-ended survey question – coupled with similar questions related to different aspects of (for example) the Christmas story – can ultimately paint a descriptive portrait of someone's beliefs, religious or otherwise.

But all of these are, to some extent, concrete objects of description – a car, buying a home, a belief (you either believe or don't believe) – that lend themselves to the discreteness associated with closed-ended survey question formats. But what about the nebulous world of *feelings*? Is it possible for the survey researcher to ascertain respondents' feelings – that is, come to a description of what people are actually feeling about a thing, an experience, or belief – by way of these same closed-ended survey question techniques?

Some seem to think so. A major hotel brand has designed a feedback survey asking recent hotel guests to describe their "ideal" hotel by rating various amenities and features such as comfortable furniture and complimentary Wi-Fi. This gives the hotel a decent depiction of a person's "ideal" hotel within the framework of what they can control, e.g., furniture décor and Internet services. The survey design, however, becomes seriously flawed when it goes on to ask, "How well do the following statements describe how your 'ideal' hotel would make you *feel*?"

Although an admirable research goal – that is, to learn how guests describe, not just the things that make a hotel "ideal" but also, the *feelings* and *sensations* these things arouse – the hotel has taken a wrong turn into the murky waters best traversed by qualitative methods. In this way, the hotel has misunderstood the design limitations of closed-ended survey questionnaire design.

A closer look at the question makes this apparent. The hotel's "feeling" question asks the respondent to rate various statements, including:

- Allows me to live the good life.
- Helps to create good memories.
- Makes me feel calm and peaceful.
- Helps put a smile on my face and makes me feel happy.
- Broadens my horizons and helps me to discover new things.
- And the list goes on…

This question is a lose-lose for both the poor respondent and, more so, the poor researcher who has to deal with the resulting survey data. The respondent clearly has the difficult task of forming context and meaning around the researcher's preconceived virtues of an ideal hotel. This requires lots of cognitive effort, involving multiple soul-searching questions: What is "the good life," what significance does that have for me, and what relevance does that have for me in choosing a hotel? Or, I am not sure what is meant by "horizons" and how horizons are broadened, is that the same as discovering "new things," and what are the new things that an ideal hotel could help me discover?

For the survey researcher, this question is even more complex. Assuming that the sole purpose of the question is not for marketing purposes, e.g., an advertising campaign to position the hotel as a sanctuary for those seeking "the good life," the person having to analyze this survey data and *operationalize* it in order to reach useful conclusions is left powerless. While the researcher may have his or her own concept of what "the good life" or "good memories" mean, there is no way *in a closed-ended survey question format* that the researcher can begin to make meaning from this data.

Capturing feelings and sensations in order to capture "real," personal experiences is a necessary and important goal of research with human beings. Yet, it is qualitative research methods – not closed-ended survey designs – that allow researchers to tap into those often elusive inner experiences.

Image captured from: http://izismile.com/2013/04/08/a_majestic_african_hotel_experience_in_kenya_21_pics.html

Humanizing Survey Question Design with a Qualitative Touch

October 27, 2014

Researchers know that "good" survey questionnaire design begins with a preliminary qualitative research phase that serves to expose the nuances of the research topic or category – such as the most pertinent issues and the relevant concerns or "issues within the issues" – along with the manner by which the target population talks about these issues – that is, the particular words, expressions, and terminology used by the target group. In this way, the survey researcher can hope to create user-friendly survey questions that speak *to* respondents rather than *at* respondents.

A preliminary qualitative phase is good and necessary, but employing the talents of a qualitative researcher *during survey question development* is an equally-important step. Qualitative researchers spend much of their lives listening to people talk about a host of attitudinal and behavioral issues, listening to the use of language, and using these conversations to interpret where people stand in relationship to the research goal. Who better then to consider the intention of each survey question in conjunction with the results of the qualitative phase and to mold the questions in a recognizable, conversational format.

A qualitative touch may be all that is needed to transform a question such as

>*Do you think soft drink distribution is adequate?*[1]

To something friendlier and more direct…

>*Are soft drinks easy to find when you want one?*[1]

Or, modify a question such as

>*Is the fee structure on your depository account at Bank ABC within acceptable limits?*

To something that clearly identifies the intention of the question…

>*Do you think the$5 ATM fee charged by Bank ABC is reasonable?*

Or, clarify a question such as

>*How important is the portable nature of your mobile device in your day-to-day activities?*

To something that explains terms and is more specific…

How has the ability to take your smartphone with you wherever you go made life easier?

Utilizing qualitative sensitivities to unwrap the true purpose of survey questions while replacing corporate jargon with the way real people talk and think, humanizes the research "instrument" which is a win-win for researchers and respondents. Researchers gain higher rates of cooperation and completion (along with lower non-response); and respondents are not left to guess – and possibly guess wrong – the meaning of questions, allowing them to move more easily through the battery of questions and, in the end, find that they actually enjoyed the research process. Gee, imagine of that.

[1]From http://survey.cvent.com/blog/cvent-web-surveys-blog/online-survey-pitfalls-writing-complex-survey-questions

Image captured from: https://www.revointeractive.com/Sunlight-Readable-Open-Frame-Monitors.php

Reporting What We Know From What We Ask

September 8, 2014

For most of us, it is important to write a final research report that goes beyond the questions we asked and the responses we received. Unlike a topline debriefing that may require a simple rundown of the questions and responses, our qualitative and quantitative studies typically culminate in write-ups that provide thoughtful discussions of our analyses and interpretations of the data.

The consumers of our research reports take it on blind faith that the data *along with the corresponding questions and issues* are reported accurately, and that the researchers' interpretations of the findings are consistent with both the data and the questions asked or issues raised. And yet blind faith is not always enough. Those are the times when a closer look at what the research actually *asked* and what is actually *reported* is needed.

One example is a July 2014 report from Gallup on its research concerning Americans' consumption habits. The report, in part, shows that nearly all (more than 90%) "actively try to include" fruits and/or vegetables in their diet. The report's author thinks this percentage may be too high, stating that "it is not clear that such a high proportion of Americans really do eat this healthily." Although the consumption rate may seem a bit bloated, the reality is that we do not know what respondents were including when thinking about the category of fruit or of vegetables. Some may have limited their notion of "fruit" to fresh, frozen, or canned; while others may believe that their concerted efforts to choose strawberry over brown sugar cinnamon Pop-Tarts® are a deliberate attempt to put fruit in their diet. And what about the respondent who considers his daily consumption of French fries as an active effort to eat more vegetables? If we include Pop-Tarts® and French fries under fruits and vegetables, the reported 90%+ figure may not be too unrealistic. Without the added question, "What did you consider when stating that you actively include fruit in your diet?" the researchers (and research users) are not able to make health claims related to fruit consumption.

Pew Research recently released a report on a 2013 study – "Social Media and the 'Spiral of Silence'" – that set out to understand people's willingness to speak openly about public policy issues and consider others' views in various face-to-face and online settings. In particular, they focused on Edward Snowden's leaks to the media pertaining to the government surveillance of Americans' telephone and email communications. Throughout the report, the authors refer to the "Snowden-NSA story" – as in *"People were less willing to discuss the Snowden-NSA story in social media than they were in person"* and *"Those who said they were very interested in the Snowden-NSA story were more likely than those who were not as interested to express their opinions."* Problem is, the survey interview never explicitly asked about the "Snowden-NSA story" but rather asked about "a government program with the aim of collecting information about people's telephone calls, emails and other online communications" or simply "the government's surveillance programs." It is understandable that directly referring to Snowden and the NSA in the interview may have biased the responses, yet it is reasonable to wonder if respondents actually interpreted the

survey questions as intended by the researchers – i.e., as referring to the "Snowden-NSA story" – or rather had a different understanding of "surveillance programs" or were thinking of a different media story altogether or were not thinking of anything in particular but in generalities. A simple add-on question at the end of the survey interview – such as, "Were you thinking of anything in particular when I asked you about the government's surveillance programs?" [IF YES] What were you thinking?" – would have shed some light on the extent to which respondents were in sync with the researcher's meaning and, specifically, whether they were thinking of the "Snowden-NSA story" when responding.

The readers and users of our research shouldn't have to double check the veracity of our assumptions and interpretations. But when they do, they should find that what we report is derived from what we actually asked in the research. Until we know what Americans include in the category of "fruit," strawberry Pop-Tarts® might as well fall into the same basket with fresh peaches and pears.

Image captured from: http://kellys-expat-shopping.nl/winkel/kelloggs-pop-tarts-frosted-strawberry-8pk/

Satisfaction Research & Other Conundrums

June 9, 2014

Greg Allenby, marketing chair at Ohio State's business school, published an article in the May/June issue of *Marketing Insights* on heterogeneity or, more specifically, on the idea that 1) accounting for individual differences is essential to understanding the "why" and "how" that lurks within research data and 2) research designs often mask these differences by neglecting the *relative nature* of the constructs under investigation. For instance, research concerning preference or satisfaction is useful to the extent it helps explain why and how people think differently as it relates to their preferences or levels of satisfaction, yet these are inherently relative constructs that only hold meaning if the researcher understands the standard (the "point of reference") by which the current question of preference or satisfaction is being weighed – i.e., my preference (or satisfaction) compared to…what? Since the survey researcher is rarely if ever clued-in on respondents' points of reference, it would be inaccurate to make direct comparisons such as stating that someone's product preference is two times greater compared to someone else's.

The embedded "relativeness" associated with responding to constructs such as preference and satisfaction is just one of the pesky problems inherent in designing this type of research. A related but different problem revolves around the personal *interpretation* given to the construct itself. This is particularly troublesome with respect to satisfaction. It frequently happens that, in the research design phase, both client and researcher readily agree to include something along the lines of "Please rate your overall satisfaction with…,"comfortable in using a ubiquitous question that everyone understands. After all, they are asking about "satisfaction," what more is there to know? Answer: lots.

What makes satisfaction research – specifically, the satisfaction question – so puzzling lies in the frequent failure to recognize that the typical satisfaction question can be interpreted in many divergent ways, yet researchers rarely explore the meanings associated with "satisfaction" in the context being asked. Left on its own, the satisfaction question presents the researcher with ambiguous data based on confounding and multifaceted interpretations of "satisfaction." "Please rate your overall satisfaction with your new car purchase." Are you asking me about:

- Happiness – How happy I am to have a new car?
- Happiness – How happy I am to finally have this particular car which is the car I've always dreamed of owning?
- Expectations – Does the new car meet my preconceived needs or expectations?
- Expectations – Did the car-purchase experience meet my preconceived expectations?
- Loyalty – Has the purchase established or solidified my loyalty to the car dealer?
- Emotional gratification – Does the new car give me peace of mind?
- Quality of life – Has the quality of my life improved because commuting is now more pleasurable in my new car?
- Customer service – Was I kept well-informed during the purchase process?

- Customer service – Were the people I dealt with pleasant and enjoyable to work with?
- Customer service – Did the person I worked with understand my needs?

And etc. You get the idea. The point being made is that researchers never know exactly what they are measuring in satisfaction research; unless, of course, they make a specific effort to delve into respondents' interpretations of the all-important satisfaction question. By not doing so, the researcher is left with a conundrum. On the one hand, the researcher might be able to report, for instance, that 90% of the customers sampled are "very satisfied" with their most recent purchase experience – and bask in the glow of smiles emanating from clients' faces – but, on the other hand, have nothing to say about the meanings or associations given to "satisfaction" when these customers went about answering the question. This leaves a gaping hole rendering the research of limited value.

As discussed here and elsewhere in this blog, the goal among all researchers, in some shape or form, is to learn how people think. This presents researchers with their #1 challenge – to heighten their awareness of the myriad assumptions they harbor related to the constructs they hope to measure, and then to build a remedy into their research designs that addresses these assumptions by clarifying the thinking – the interpretations and meanings – that people use to personally define researchers' constructs and formulate a response to their questions. Validity at its best.

Image captured from: http://gygrazok.deviantart.com/art/Entwined-Conundrum-56054549