Qualitative Research:
A Collection of Articles from *Research Design Review* Published in 2016

Margaret R. Roller

Research Design Review – www.researchdesignreview.com– is a blog first published in November 2009. RDR currently includes nearly 160 articles concerning quantitative and qualitative research design issues. Many of the articles published in 2016 were dedicated to qualitative research for the simple reason that qualitative researchers are faced with myriad issues when attempting to achieve quality outcomes, and yet there is relatively little discussion about the quality standards by which to guide their research. RDR attempts to fill this void by focusing on the unique attributes of qualitative research and how they serve to define the optimal approaches to conducting qualitative research that is credible, analyzable, transparent, and useful. This paper presents the 17 RDR articles that were published in 2016 devoted to qualitative research. Five of these articles concern the Total Quality Framework – the subject of Applied Qualitative Research Design: A Total Quality Framework Approach (Roller & Lavrakas, 2015) – 5 articles pertain to qualitative data and analysis, 4 articles relate to specific methods, 2 articles address researcher bias, and 1 article talks about misplaced concepts adopted from quantitative research (e.g., referring to research participants as "respondents").

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Article pertaining to: Total Quality Framework

Evaluating Quality Standards in a Qualitative Research Literature Review

A December 2015 article in *Research Design Review* discusses "A Quality Approach to the Qualitative Research Proposal." The article outlines the eight sections of a "TQF proposal," i.e., a proposal whereby quality design issues – specifically, related to the four components of the Total Quality Framework – play a central role throughout the writing of each proposal section. This approach enables the researcher to be mindful of the considerations that go into developing, implementing, and reporting a qualitative research study that is built on quality standards. The TQF proposal can then live on beyond the proposal phase to inform the researcher as he/she goes about executing the proposed design.

The second section of the TQF proposal is called "Background and Literature Review" and is devoted to giving the reader the context in which to situate the relevance of the proposed study as well as details of the target population and past research efforts with the population segment and/or research topic. When conducting a literature review for a TQF proposal, it is worthwhile for the researcher to use a reference table or matrix that helps to evaluate each relevant study according to the steps that were taken to maximize Credibility (e.g., representativeness of the sample, validity of the data), Analyzability (i.e., completeness and accuracy of the data processing and verification), Transparency (i.e., completeness and disclosure of the study details), and Usefulness (i.e., the ability to do something of value with the outcomes).

This literature review evaluation table is predicated on the idea that not all qualitative research studies are equally reliable and valid. In addition to keeping track of the relevant research unearthed in his/her investigation, the literature review table allows the researcher to efficiently evaluate the quality standards that were employed in these studies, along with their strengths and limitations from a quality standpoint, and determine which studies to cite in the proposal.

Further, a revised table comprised of just those references actually cited in the proposal is a useful addition to the proposal itself. This table provides proposal readers with a convenient way to view cited references in conjunction with the researcher's comments related to each study's strengths and limitations from a TQF perspective.

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An example of a partial Literature Review Reference Summary Evaluation Table for a proposed study on physician-patient relations is shown below.

Literature Review Reference Summary Evaluation Table				
	Study Design Considerations from a TQF Perspective			
Reference	Credibility	Analyzability	Transparency	Usefulness
Forbat, White, Marshall-Lucette, & Kelly, 2012 *Discussing the Sexual Consequences of Treatment in Radiotherapy and Urology Consultations with Couples Affected by Prostate Cancer*	Purposive sampling to explore a range of patient types, 60 observations of consultations in clinics	Processing and verification procedures not documented	Provides details of the observations, including excerpts from field notes as well as site and patient information	Tackles a topic not widely found in the literature and identifies opportunities to enhance conversations about sexual function
López, A., et al., 2012 *What Patients Say About Their Doctors Online: A Qualitative Content Analysis*	Purposive sampling from two rating websites to obtain a range of reviews of primary care physicians, 445 reviews of primary care physicians	Thorough content analysis process utilizing deductive & inductive reasoning, gives examples of codes/themes	Detailed discussions of the method and the content analysis process, as well as the limitations of the study	Internet reviews provide unfiltered insights from patients who can remain anonymous & give input that may ultimately improve the physician-patient relationship

*Total Quality Framework. Table adapted from: *Applied Qualitative Research Design: A Total Qualitative Approach* (Roller & Lavrakas, 2015)

Image captured from: https://a2ua.com/quality.html

Article pertaining to: Total Quality Framework

Reporting Qualitative Research: A Model of Transparency

A number of articles in *Research Design Review* have discussed, in one form or another, the Total Quality Framework (TQF)[*] approach to qualitative research design. An *RDR* post last month pertained to applying the TQF to the in-depth interviewing method; while other articles have focused on ways to integrate quality measures – in harmony with the TQF – into ethnography, mobile research, and the research proposal. Separate from applications per se, an article in February 2015 discussed the compatibility of a quality approach with social constructionism.

One of the four components of the TQF is Transparency[**] which is specific to the reporting phase of the research process. In particular, Transparency has to do with the researcher's full disclosure of the research design, fieldwork, and analytical procedures in the final document. This sounds simple enough yet it is common to read qualitative research reports, papers, and articles that too quickly jump to research findings and discussion, with relatively scant attention given to the peculiarities of the design, data gathering, or analysis. This is unfortunate and misguided because these details are necessary for the user of the research to understand the context by which interpretations were derived and to judge the applicability of the outcomes to other situations (i.e., transferability).

There are, of course, exceptions; and, indeed, many researchers are skillful in divulging these all-important details. One example is Deborah C. Bailey's article, "Women and Wasta: The Use of Focus Groups for Understanding Social Capital and Middle Eastern Women." In it, Bailey provides a rich background of her involvement with this study, her interest in exploring "how some Islamic women from the United Arab Emirates (U.A.E.) perceive access and use of the social capital identified as wasta" (p. 2) and the "bond of trust" she established with women attending Zayed University which furthered her research objective. The method section goes beyond simply stating that focus group discussions were conducted but rather gives the reader the researcher's justification for choosing focus groups over alternative methods, e.g., "focus groups work well for encouraging participants to explore topics that have shared social meaning but are seldom discussed" (p. 3), explaining wasta as a "social phenomenon" and the supportive function focus groups provide.

Bailey goes on to describe how she chose her research team and the reflective exercise she conducted with the team prior to embarking on the study to "help them understand their own beliefs

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and experience about wasta" (p. 4). Bailey also gives an explanation of how participants were chosen and the results of the recruiting process, as well as how she developed the discussion guide and her decision to use translators (allowing participants the option to speak Arabic as well as English). In the "Focus Group Process" section, Bailey recounts the introductory remarks that were made at the start of each focus group and explicitly states the seven key questions participants were asked during discussions.

The author's reporting of the analysis process and results is equally informative. Here, Bailey describes how the research team worked separately and together to derive categories and themes from the data; and, importantly, the inclusion of a reflective assessment among analysts to mitigate potential bias associated with personal beliefs during the analysis phase. In addition, Bailey inserted a "Wasta Focus Group Matrix" in the Appendix which provides an informative breakdown of categories and themes by the three wasta segments (i.e., high wasta, some wasta, and low wasta). Following analysis, Bailey gives the reader a well-thought out, clear, and useful discussion of results, enriched by numerous verbatims that support the findings.

Transparency in the reporting of qualitative research using thick description is critical to the integrity of the research process. Transparency enables users of the research to evaluate the outcomes within the proper context and determine the transferability of the research to other compatible situations or environments.

[*]An in-depth discussion of the Total Quality Framework can be found in *Applied Qualitative Research Design: A Total Quality Framework Approach* (Roller & Lavrakas, 2015. New York: Guilford Press.).

[**]The other three TQF components are: Credibility, Analyzability, and Usefulness. Transparency is discussed throughout *Research Design Review*, e.g., see this December 2012 article.
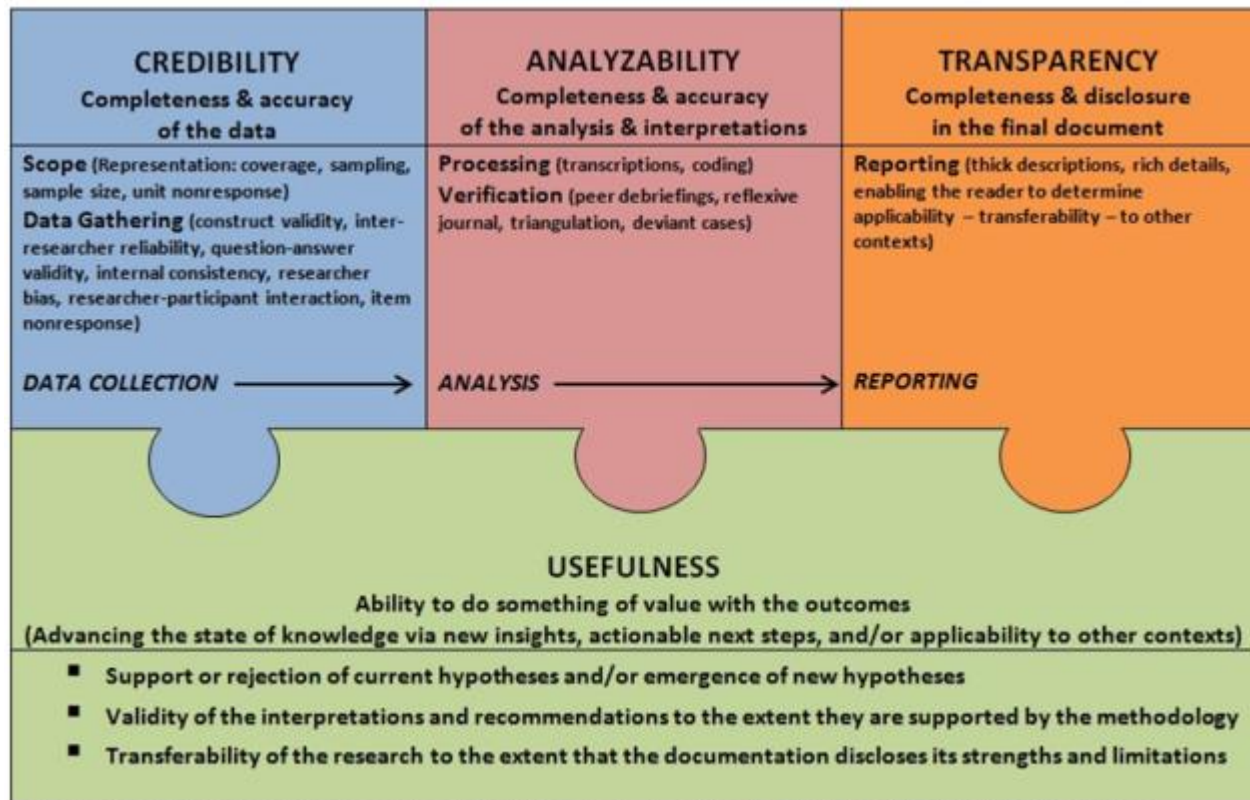
Image captured from: http://thecontextofthings.com/2016/04/18/transparency-in-business/

Article pertaining to: Total Quality Framework

Applying a Quality Framework to the In-depth Interview Method

Article pertaining to: Total Quality Framework

Mode Differences in Focus Group Discussions

CREDIBILITY
Completeness & accuracy of the data

Scope (Representation: coverage, sampling, sample size, unit nonresponse)
Data Gathering (construct validity, inter-researcher reliability, question-answer validity, internal consistency, researcher bias, researcher-participant interaction, item nonresponse)

DATA COLLECTION ⟶

ANALYZABILITY
Completeness & accuracy of the analysis & interpretations

Processing (transcriptions, coding)
Verification (peer debriefings, reflexive journal, triangulation, deviant cases)

ANALYSIS ⟶

TRANSPARENCY
Completeness & disclosure in the final document

Reporting (thick descriptions, rich details, enabling the reader to determine applicability – transferability – to other contexts)

REPORTING

USEFULNESS
Ability to do something of value with the outcomes
(Advancing the state of knowledge via new insights, actionable next steps, and/or applicability to other contexts)

- Support or rejection of current hypotheses and/or emergence of new hypotheses
- Validity of the interpretations and recommendations to the extent they are supported by the methodology
- Transferability of the research to the extent that the documentation discloses its strengths and limitations

From: *Applied Qualitative Research Design: A Total Quality Framework Approach* (Roller & Lavrakas, 2015. New York: Guilford Press)

There are four components to the Total Quality Framework in qualitative research design. The first component, Credibility, has to do with data collection; specifically, the completeness and accuracy of the data collected. There are two critical facets to Credibility – Scope (coverage and representation) and Data Gathering (bias, nonresponse, and how well [or not] particular constructs are measured).

The second component is Analyzability. This component is concerned with the completeness and accuracy of the analyses and interpretations. The Analyzability component is concerned with Processing (e.g., the use of transcriptions, coding) and Verification (e.g., by way of triangulation, deviant cases, and/or a reflexive journal).

By looking at just these two components of the TQF, what judgements can we make as to the strengths and limitations of the various modes we might choose from for any given method? For example, three of the most common modes for focus group discussions are: face-to-face, phone, and online (asynchronous). Each of these modes has implications related to data collection and analysis. The tables (below) present a few of these considerations. With respect to "strengths," for

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instance, the face-to-face mode has the advantage of facilitating rapport building as well as data verification by way of observers. The phone mode, on the other hand, extends the coverage (which can be particularly important in conducting research with hard-to-reach segments); while the asynchronous online mode typically results in lengthy, detailed responses that are conveniently and immediately available in transcription form.

Focus Group Modes

	Credibility	Analyzability
Strengths		
Face-to-face	Most similar to natural conversation (dynamic & interactive), facilitates building rapport, can use a broad range of moderator techniques, easily share a broad range of stimuli, refreshments aid cooperation & rapport, immediate distribution of cash incentives.	Can audio &/or video record, visual cues add meaning, verification via observers who offer a different perspective, various data sources – audio, video, in-discussion writing/drawing exercises.
Phone	Scope (wide coverage, more groups, hard-to-reach segments), gaining cooperation (convenience in scheduling, participation), absence of visual cues that may bias, willingness to discuss sensitive topics.	Can audio record, possibly verify via "observers" listening in.
Online (asynchronous)	Scope (wide geographic coverage, hard-to-reach segments), gaining cooperation (convenience of scheduling, participation), detailed responses, sense of anonymity, (potentially) a lot of interaction, moderator/participants can share photos, video, other media.	Built-in transcripts, detailed content to analyze, online platforms offer a high level of functionality, e.g., tagging, word clouds, exporting.

Credibility: Number of groups, gaining cooperation, use of techniques, moderator bias (inappropriate comments, appearance), moderator inconsistency (concept/definition presentation), participant effects (rapport, willingness to share attitudes, paying attention to verbal and visual cues).
Analyzability: Various data sources, participant interaction, transcriptions/transcriptionists, verification (observers).

There are also certain limitations of these modes related to data collection and analysis. Coverage, for instance, can be a problem and fewer groups may be possible due to scant resources when attempting to conduct face-to-face focus groups, and the absence of visual cues (when no photos or video are used) hamper the analysis of phone and online discussions.

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Focus Group Modes

	Credibility	Analyzability
Limitations		
Face-to-face	Scope (coverage, fewer groups), gaining cooperation (convenience in scheduling, participation), moderator bias (appearance, must be skilled in managing group dynamics), dominating participants can control the outcomes & prevent others from speaking, participant effects (unwillingness to engage).	Data may be incomplete because the group interaction environment stifled some participants, i.e., not everyone was heard.
Phone	Less natural form of discussion, weakened ability to establish rapport, absence of visual cues that aid in interpretation, shorter discussion length/less in-depth, participants may be distracted or inattentive (moderator needs to make a special effort to foster a lively discussion & ensure that everyone has spoken).	Lack of visual cues to aid in interpretation.
Online (asynchronous)	Scope (coverage bias, e.g., certain demographic segments, people with limited literacy), weakened ability to establish rapport & keep discussion on track, text is primary form of communication, ethical considerations.	The impressions that participants give through their text can negatively impact the quality of the analysis and interpretation of the data.

Credibility: Number of groups, gaining cooperation, use of techniques, moderator bias (inappropriate comments, appearance), moderator inconsistency (concept/definition presentation), participant effects (rapport, willingness to share attitudes, paying attention to verbal and visual cues).

Analyzability: Various data sources, participant interaction, transcriptions/transcriptionists, verification (observers).

Article pertaining to: Total Quality Framework

Applying a Quality Framework to the Focus Group Method

Article pertaining to: Qualitative Data & Analysis

Qualitative Data: Achieving Accuracy in the Absence of "Truth"

One of the [10 unique attributes of qualitative research](#) is the "absence of truth." This refers to the idea that the highly contextual and [social constructionist](#) nature of qualitative research renders data that is, not absolute "truth" but, useful knowledge that is the matter of the researcher's own subjective interpretation. For all these reasons – contextuality, social constructionism, and subjectivity – qualitative researchers continually question their data, scrutinize outliers (negative cases), and implement other steps towards verification.

Qualitative researchers also conduct their research in such a way as to maximize the accuracy of the data.

Accuracy should not be confused with "truth." Accuracy in the data refers to gaining information that comes as close as possible to what the research participant is thinking or experiencing *at any moment in time*. This information may be the product of any number of contextual (situational) and co-constructed factors – i.e., the absence of "truth" – yet an accurate account of a participant's stance on a given issue or topic.

It is accuracy that qualitative researchers strive for when they craft their research designs to mitigate bias and inconsistency. For example, focus group moderators are trained to give equal attention to their group participants – allowing everyone an opportunity to communicate their thoughts – rather than bias the data – i.e., leading to inaccurate information – by favoring more attention on some participants than on others. A trained moderator is also skilled at listening for inconsistencies or contradictions throughout a discussion in order to follow up on each participant's comments, asking for clarification, and ultimately coming away with an accurate "picture" of that participant in relationship to the topic *as communicated in that particular space and time*.

This pursuit of accuracy is no less evident in the in-depth interview (IDI) method. By attending to the potential for interviewer bias – from question wording, imposing personal beliefs or values into the conversation, physical appearance in face-to-face IDIs – as well as the seemingly contradictory

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statements made by interviewees, the qualitative researcher is focused on securing an accurate portrayal of how that participant thinks and behaves in association with the research objective. It is not uncommon, for instance, for an IDI participant to state one thing at the beginning of an interview but to make one or more outwardly conflicting statements later in the interview. Why is that? Which statement is accurate? Do the statements really contradict each other? What more does the interviewer need to learn about the interviewee? These are the questions the interviewer must address throughout the IDI in the quest for accurate data.

Achieving accuracy in the data collection process is, like all aspects of qualitative research, a nuanced and often difficult mission. It is, however, a mission worth pursuing because, unlike absolute "truth," it is an obtainable and necessary ingredient to deriving outcomes that enable consumers of the research to actually do something meaningful with the findings.

Article pertaining to: Qualitative Data & Analysis

Chaos & Problem Solving in Qualitative Analysis

In *Conceptual Blockbusting: A Guide to Better Ideas*, James Adams offers readers a varied and ingenious collection of approaches to overcoming the barriers to effective problem solving. Specifically, Adams emphasizes the idea that to solve complex problems, it is necessary to identify the barriers and then learn to think differently. As far as barriers, he discusses four "blocks" that interfere with conceptual thinking – perceptual, emotional, cultural and environmental, and intellectual and expressive – as well as ways to modify thinking to overcome these blocks – e.g., a questioning attitude, looking for the core problem, list-making, and soliciting ideas from other people.

Adams' chapter on emotional blocks discusses ways that the thinking process builds barriers to problem solving. One of these is the inability or unwillingness to think through "chaotic situations." Adams contends that a path to complex problem solving is bringing order to chaos yet some people have "an excessive fondness for order in all things" leaving them with an "inability to tolerate ambiguity." In other words, they have "no appetite for chaos." Adams puts it this way –

The solution of a complex problem is a messy process. Rigorous and logical techniques are often necessary, but not sufficient. You must usually wallow in misleading and ill-fitting data, hazy and difficult-to-test concepts, opinions, values, and other such untidy quantities. In a sense, problem-solving is bringing order to chaos. (p. 48)

Problem solving *is* a "messy process" and no less so when carrying out an analysis of qualitative data. There are several articles in *Research Design Review* that touch on the messiness of qualitative analysis. In particular, "The Messy Inconvenience of Qualitative Analysis" underscores the idea that

Unlike the structured borders we build into our quantitative designs that facilitate an orderly analytical process, qualitative research is built on the belief that there are real people beyond [these borders] and that rich learning comes from meaningful conversations. But the course of a meaningful conversation is not a straight line. The course of conversation is not typically one complete coherent stream of thought followed by an equally well-thought-out rejoinder.

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Put differently, qualitative analysts must endure a certain amount of chaos if they are to achieve their goal of bringing some semblance of "order" (i.e., interpretation) to their in-depth interview, focus group, ethnographic, narrative, or case study data. It is their ability to embrace the tangled web of human thought and interaction that allows qualitative researchers to unravel the most complex problem of all – how people think or do the things they do.

It may also be the reason why qualitative analysis remains such a mystery to quantitative-leaning researchers and, indeed, the impediment that discourages these researchers from using qualitative methods, either alone or in mixed-method designs. Qualitative analysis requires a conscious effort to accept some chaos, to not rush the march to find order in the data, and to feel comfortable in the notion that this process will lead to meaningful outcomes.

Although bringing some measure of order is a necessary ingredient to the analysis process, "the ability to tolerate chaos," as Adams states, "is a must." In this respect, Adams talks about the "limited problem-solver" as one who struggles with

The process of bringing widely disparate thoughts together [and who] cannot work too well because [his] mind is not going to allow widely disparate thoughts to coexist long enough to combine [them into a meaningful solution]. (p. 48)

Qualitative analysis is not unlike solving complex problems that demand problem-solvers who are not limited by the need for order but rather embrace the more chaotic and rich world of humans' lived experiences.

Image captured from: https://www.flickr.com/photos/22537886@N07/4734946701

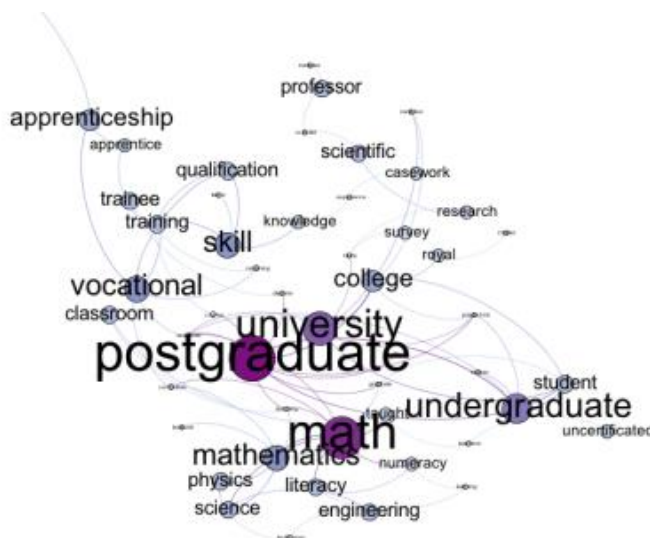# Article pertaining to: Qualitative Data & Analysis

Words Versus Meanings

There is a significant hurdle that researchers face when considering the addition of qualitative methods to their research designs. This has to do with the analysis – making sense – of the qualitative data. One could argue that there are certainly other hurdles that lie ahead, such as those related to a quality approach to data collection, but the greatest perceived obstacle seems to reside in how to *efficiently* analyze qualitative outcomes. This means that researchers working in large organizations that hope to conduct many qualitative studies over the course of a year are looking for a relatively fast and inexpensive analysis solution compared to the traditionally more laborious thought-intensive efforts utilized by qualitative researchers.
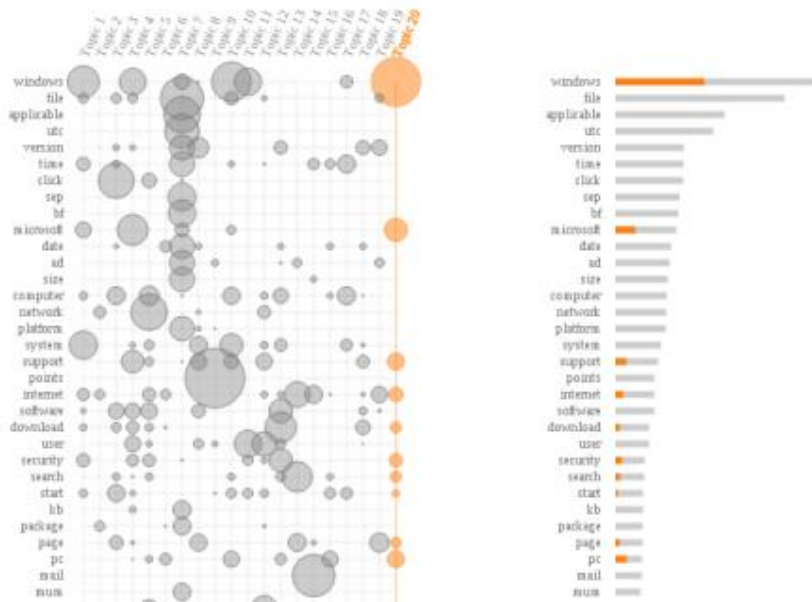
Among these researchers, efficiency is defined in terms of speed and cost. And for these reasons they gravitate to text analytic programs and models powered by underlying algorithms. The core of modeling solutions – such as word2vec and topic modeling – rests on "training" text corpora to produce vectors or clusters of co-occurring words or topics. There are any number of programs that support these types of analytics, including those that incorporate data visualization functions that enable the researcher to see how words or topics congregate (or not), producing images such as these

http://dilipad.history.ac.uk/2015/08/05/visualizing-parliamentary-discourse-with-word2vec-and-gephi/

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https://smirnov.ca/canadian-ai-2014-recap-a8b6058e9de6#.pcne7qf0z

Words are important. Words are how we communicate and convey our thoughts. And the relationships between words and within phrases can be useful indicators of the topics and ideas we hope to communicate. Words, on the other hand, do not necessarily express *meaning* because it is how we *use* the words we choose that often defines them. How we use our words provides the context that shapes what the receiver hears and the perceptions others associate with our words. Context pertains to apparent as well as unapparent influences that take the meaning of our words beyond their proximity to other words, their use in recognized terms or phrases, or their imputed relationship to words from Google News (word2vec).

For example, by the words alone and without a contextual reference, it would be difficult to understand the meaning of the following comment made by a male focus group participant:

"A woman's place is in the home."

Was this participant making a comment on traditional values, or was he expressing intolerance on a broader scale, or was he emphasizing the importance of home and home life?

Context is also provided by the manner in which the words are spoken. An educator participating in an in-depth interview, for example, might state,

"I use technology in the classroom when I can!"

While another educator might state,

"I use technology in the classroom, when I can."

The same words used in the same order but with different intended meanings.
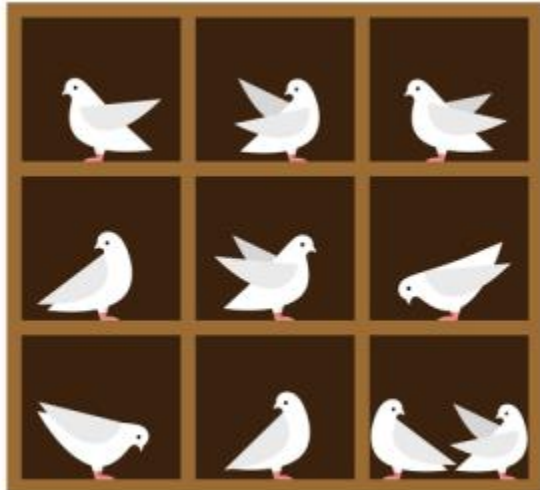
So, those who want to incorporate qualitative methods into their research designs still face the hurdle of finding a "quick" and "low cost" alternative to the painstaking work of qualitative analysis. But awareness and the thoughtful consideration of the need to go beyond words – and find actual meaning – will ultimately lead to more accurate and useful outcomes.

Image captured from: https://www.trustedtarot.com/cards/the-sun/

Article pertaining to: Qualitative Data & Analysis

Pigeonholing Qualitative Data: Why Qualitative Responses Cannot Be Quantified

A recent webinar on the ins-and-outs of qualitative research stated that qualitative data could be quantified by simply counting the codes associated with some aspect of the data content, such as the number of times a particular brand name is mentioned or a specific sentiment is expressed towards a topic of interest. The presenter asserted that, by counting these codes, the researcher has in effect "converted" qualitative to quantitative data.

This way of thinking is not unlike those who contend that useful quantitative data can be calculated with qualitative findings by counting the number of "votes" for a particular concept or some aspect of the research subject matter. Let's say a moderator asks group participants to rate a new product idea on a modest four-point scale from "like very much" to "do not like at all." Or, an interviewer conducting qualitative in-depth interviews (IDIs) asks each of the 30 participants to rate their agreement with statements pertaining to the advantages of digital technology on a scale from "strongly agree" to "strongly disagree." It is the responses to these types of questions that some researchers gather up as votes and report as quantitative evidence.

By asserting that codes and votes can be counted and hence transform a portion of qualitative findings into quantitative data, these researchers are making the case, knowingly or not, that these codes and votes are discrete items. But, of course, they are not.

Unlike the structured environment of survey research, qualitative data is the product of a host of variables that influence outcomes in any number of ways. When a survey respondent picks a brand name from a list or rates a concept on a given scale, he/she is responding to a specifically-worded question that is: being asked of all respondents in exactly the same way, typically positioned in the same or similar context in relationship to the other survey questions, and not preceded by researcher-respondent conversations concerning the topic. Qualitative methods, on the other hand, do not abide by these standards. By definition, qualitative research embraces flexible question-and-answer environments where the researcher (interviewer, moderator) is never quite sure what byways the discussion will take as it journeys to the final destination of the research objective. It is the multi-faceted context of this environment that steers the course to some degree.

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As a result, there is no telling what influences impinge on a participant's responses in an IDI or focus group. Did the discussion leading up to the question familiarize the participant with otherwise unknown information about the topic at hand? In what way did the interviewer/moderator modify how questions were asked based on the participant's responses to earlier questions? How did the research environment – e.g., the highly talkative "dominator" in a focus group discussion – alter a participant's attitude or willingness to answer honestly?

In qualitative research, context is everything. By paying attention to context, qualitative researchers are able to identify meaningful connections and draw useful – more profound – interpretations about "what makes people tick" that go beyond survey data. But context also limits how qualitative data can be used. Just as context precludes a qualitative researcher from generalizing qualitative outcomes, so too context prevents the researcher from treating the data as discrete, independent responses to be counted and thereby hoping to pigeonhole qualitative data as something it is not.

Image captured from: http://www.susan-ingram.com/2016/04/divorce-mediation-and-the-pigeonhole-effect/

Article pertaining to: Qualitative Data & Analysis

Qualitative Analysis: The Biggest Obstacle to Enriching Survey Outcomes

Analysis is probably the biggest obstacle to the broader utilization of qualitative research methods. Other aspects of qualitative research – such as data collection (which is discussed at length throughout *Research Design Review* as it relates to applying quality standards) – may require a certain degree of resources and deliberation but are not difficult to achieve. Obtaining a representative list of potential participants, for example, or honing the necessary skills to mitigate interviewer bias and gain cooperation from participants demand concentrated efforts on the part of the qualitative researcher but there are fairly straightforward, well-documented procedures to accomplish these goals.

Analysis, however, *is* difficult and it is the reason why many survey researchers are loath to incorporate a qualitative component – open-ended questions in a survey questionnaire or a full-blown qualitative project – in their overall study designs. The idea that analysis presents a significant hurdle to potential users of qualitative research is revealed in comments made in a group discussion I conducted on schizophrenia with psychologists concerning their research with caregivers. When asked why qualitative methods were so rarely (or never) conducted in conjunction with their survey research, these psychologists told me

"Open-ended questions are okay if there is someone with qualitative data analytic experience to analyze these data."

"Open-ended questions provide interesting clinical data but there are real challenges in how best to code these qualitative data."

Similarly, a researcher friend who explicitly advises *against* using open-ended questions in survey questionnaires, defends this bias asserting that

"[Survey researchers] don't usually have the time, resources, or patience to actually analyze the qualitative data [and] you have to have a sophisticated researcher who understands that the conclusions drawn from qualitative data must be made carefully."

These comments point to the fundamental obstacle hampering the wider use and acceptance of qualitative research among survey researchers – that is, qualitative data are typically complex,

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multifaceted, and not easily herded into neat meaningful silos. This makes qualitative analysis extremely "messy." A November 2010 *RDR* article, "The Messy Inconvenience of Qualitative Analysis," discusses this messiness, stating in part

 "Unlike the structured borders we build into our quantitative designs that facilitate an orderly analytical process, qualitative research is built on the believe that there are real people beyond those quantitative borders and that rich learning comes from meaningful conversations…The course of conversation is not typically one complete coherent stream of thought followed by an equally well-thought-out rejoinder. These conversations are not rehearsed to ensure consistent, logical feedback to our research questions; but instead are spontaneous discussions where both interviewee and interviewer are thinking out loud, continually modifying points of view or ideas as human beings do."

By going "beyond those quantitative borders," qualitative data add significant understanding of how people think, their motivations, and their lived experiences that help explain certain behavior or attitudes on a particular issue. Yet, it is these same objectives that produce complex, rich qualitative data that complicates the analysis process and steers survey researchers away from qualitative research.   Qualitative analysis serves as an unfortunate roadblock to enriching survey outcomes by way of even the most modest gesture to qualitative, e.g., an open-ended question in a survey interview.

That is the problem but what is the solution. Like qualitative data, there is no simple solution. There are, however, ways our research designs could be made more inclusive. To name the most obvious, survey researchers could

- Begin a dialog with qualitative researchers – those working within the organization or outside consultants – by which everyone shares their knowledge and expertise, and gains an understanding of how survey and qualitative researchers can work together in the data collection as well as analysis and reporting phases of a study.
- From this dialog, form a quantitative-qualitative collaboration. Create quant-qual teams whereby certain qualitative researchers work with particular survey researchers in a specific category or topic area. The qualitative team members are responsible for designing the appropriate integration of qualitative in the overall study framework, overseeing data collection, *conducting the qualitative data analysis*, and working with the quantitative researchers in the interpretation and reporting phases.
- Explore the possibility of using online quant-qual solutions – such as iModerate (utilizing their ThoughtPath approach), Knowledge Networks (via Qual^e Probe) – which may facilitate adding qualitative to a survey study, including an efficient option for analysis.
- Become familiar with CAQDAS – computer-assisted qualitative data analysis software – and what the various software providers offer in the way of features that can "simplify" the analysis of qualitative data. To be clear, there is no simple solution to the analysis of qualitative data – the analysis requires a great deal of human time and brain power to absorb the material and consider contextual factors – however, CAQDAS does offer the researcher useful supporting functions, e.g., organizing the data and visualizing relationships.

Qualitative data analysis will never be "easy" but there are ways to make it less of an obstacle to survey research and ultimately produce more insightful outcomes.

Image captured from: http://www.business2community.com/content-marketing/5-common-content-marketing-obstacles-01348800

Article pertaining to: Specific methods – Ethnography

Facilitating Reflexivity in Observational Research: The Observation Guide & Grid

Observational research is "successful" to the extent that it satisfies the research objectives by capturing relevant events and participants along with the constructs of interest. Fortunately, there are two tools – the observation guide and the observation grid – that serve to keep the observer on track towards these objectives and generally facilitate the ethnographic data gathering process.

Not unlike the outlines interviewers and moderators use to help steer the course of their in-depth interviews and group discussions, the **observation guide** serves two important purposes: 1) It reminds the observer of the key points of observation as well as the topics of interest associated with each, and 2) It acts as the impetus for a reflexive exercise in which the observer can reflect on his/her own relationship and contribution to the observed at any moment in time (e.g., how the observer was affected by the observations). An observation guide is an important tool regardless of the observer's role. For each of the five observer roles[*] – nonparticipant (off-site or on-site) and participant (passive, participant-observer, or complete) observation – the observation guide helps to maintain the observer's focus while also giving the observer leeway to reflect on the particular context associated with each site.

Observation Grid: Train Travelers Example			
Site location:	Date:	Start time:	Stop time:
	Research Issue		
Area of Observation	Waiting	Delays	Boarding
Behavior (what, by whom, where)			
Conversation (what, by whom, where)			
Context (What else is going on? What is the weather? Is it a holiday?)			
Type of traveler (alone, families, business companions)			
General mood (what, how conveyed, by whom)			
Other areas of observation:			
Reflexive comments:			

Adapted from Roller & Lavrakas, 2015. *Applied Qualitative Research Design: A Total Quality Framework Approach.* New York: Guilford Press.

As an adjunct to the observation guide, it is recommended that ethnographic researchers also utilize an **observation grid**. The grid is similar to the guide in that it helps remind the observer of the

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events and issues of most import; however, unlike the guide, the observation grid is a spreadsheet or log of sorts that enables the observer to actually record (and record his/her own reflections of) observable events in relationship to the constructs of interest. The grid might show, for instance, the relevant constructs or research issues as column headings and the specific foci of observation as rows. In an observational study of train travel, for example, the three key research issues related to activity at the train station might be: waiting for departures, delays in departures, and boarding; and the key areas of observation would pertain to behavior, conversations heard, and contextual information such as the weather and the general mood. Like the guide, the observation grid not only ensures that the principal issues and components are captured but also encourages the observer to reflect on each aspect of his/her observations and identify the particular ways the observer is influencing (or is being influenced by) the recorded observations.

*Roller & Lavrakas, 2015. *Applied Qualitative Research Design: A Total Quality Framework Approach*. New York: Guilford Press.

Reporting Ethnography: Storytelling & the Roles Participants Play

In Chapter 10 of [Sam Ladner](#)'s book [*Practical Ethnography: A Guide to Doing Ethnography in the Private Sector*](#), the author discusses a best practice approach to reporting ethnographic research for a corporate audience. She states that "private-sector ethnographic reports are successful if they are dramatic and consistent with the organization's truth regime" (p.165). To this end, Ladner recommends text reports with "clickable hyperlinks" throughout and supplemental material, such as a PowerPoint presentation, that acts as the "marketing campaign" or "movie trailer" for the text document.

As another "delightful element" to the ethnography report, Ladner suggests the use of personas or archetypes, each representing a depiction of participants that share a particular characteristic. This is "a useful way to summarize the voluminous amount of qualitative data" (p. 167); however, Ladner cautions that personas "are often done badly" and points to [Steve Portigal](#)'s article on the subject matter, ["Persona Non Grata."](#) In it, Portigal advocates for maintaining the "realness" of research participants rather than manufacturing a "falsehood" (by way of personas) that distances the users of the research from the people they want to know most about. Portigal encourages researchers to engage with the "messiness of actual human beings," emphasizing that "people are too wonderfully complicated to be reduced to plastic toys [that is, personas]."

Reporting observational research for corporate users can be a challenge. On the one hand, the researcher is obligated to dig into the messiness of analysis and convey an honest accounting of what the researcher saw and heard. On the other hand, the final reporting is meaningless if no one pays attention to it, thereby preventing the research from having the desired effect of bringing new energy and a new way of thinking to the organization. Ladner and Portigal agree that powerful storytelling grounded in reality is the best approach, but how do we create a compelling drama while maintaining the integrity of our data? A combination of formats, as Ladner suggests, is one tactic. And the use of personas may be another. An open and ongoing discussion among researchers about personas – *if* and *how* the roles we assign the actors in our final story are (or can be) created while staying true to the study participants – seems like a worthwhile effort.

Image captured from: https://www.thestage.co.uk/features/2015/386081/

Article pertaining to: Specific methods – Case-centered Research

Lighting a Path to Guide Case-centered Research Design: A Six-step Approach

Elliot Mishler coined the term "case-centered research" to refer to the research approach that

preserves the "unity and coherence" of research participants through the data collection and analysis process. Fundamental to case-centered research is its focus on complex social units (or "cases") in their entirety as well as the emphasis on maintaining the cohesiveness of the social unit(s) throughout the research process. As discussed in *Research Design Review* back in 2013, two important examples of case-centered approaches are case study research and narrative research.

The complexity and need for cohesion in case-centered research present unique design challenges. Indeed, quality outcomes from case study and narrative research are the result of a well-defined process that guides the researcher from the initial conceptualization phase to data collecting in the field. Although the specifics within the process will vary from study to study, there exists an optimal design flow when implementing the case-centered research approach.

The appropriate path in case-centered designs, leading to data collection, involves the following six basic phases or steps*:

1. **Establishing priorities.** By establishing research priorities, the researchers contribute greatly to the ultimate "success" of the overall process as well as the final outcomes. The research team should identify priorities by addressing a series of questions such as, Are we only interested in a specific case or in using the case to say something more broadly about a larger population of cases? What is the role of theory development and the need for replication in conjunction with the research objective?

2. **Determining the need for and conducting a literature review.** A review of the literature can serve a very important function when the research focus is beyond the case itself, i.e., the goal is to extend, confirm, or deny existing theory or hypotheses. In this instance, a literature review helps

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form the theoretical framework that will steer design and implementation of the research, e.g., helping to identify the specific factors or variables that are closely associated with the research issue.

3. **Selecting a single case or multiple cases.** The research team may opt for a single case study, for example, when the focus of interest is on an isolated issue or entity, e.g., the physician-patient interaction at one city hospital or the lived experience of a victim of domestic violence. A multiple case approach, on the other hand, is appropriate when the objective of the research is to extend a theory or say something about the broader population segment, e.g., life stories from gifted students to understand the factors that contribute to their and similar students' drive to succeed.

4. **Determining the unit(s) and variable(s) of analysis.** There are two levels of specificity that researchers need to consider related to the data collection process: (1) the unit(s) of analysis represents the primary aspect of a case that will be the focus of investigation (e.g., gifted students' life stories) and (2) the variable(s) of analysis are subcategories within the units of analysis that guide researchers in their examination of the units (e.g., signs of creativity before and after the first grade in school).

5. **Identifying the appropriate methods.** Case-centered research utilizes multiple qualitative methods. Case study research frequently involves on-site observation (i.e., ethnography) and in-depth interviews (IDIs), while narrative research leans heavily on the unstructured IDI. Both, however, also incorporate other methods and data sources such as document reviews, imagery artifacts (e.g., students' completed exams), and video diaries.

6. **Preparing for the field.** There are a number of considerations that need to be addressed to prepare for data collection in the field. These include: developing the appropriate tools (e.g., IDI guide, observation grid); determining the role of each research team member; determining what, if any, problems exist in gaining access to the participants; obtaining informed consent; and initiating preliminary interaction with participants to begin building rapport.

* Adapted from Applied Qualitative Research Design: A Total Quality Framework Approach (Roller & Lavrakas, 2015. New York: Guilford Press)

Image captured from: https://afremov.com/THE-PATH-TO-VICTORY-PALETTE-KNIFE-Oil-Painting-On-Canvas-By-Leonid-Afremov-Size-36-X20.html

Article pertaining to: Specific methods – Case-centered Research

Ethical Considerations in Case-centered Qualitative Research

Case-centered qualitative research is discussed elsewhere in this blog (in particular, see "Multi-method & Case-centered Research: When the Whole is Greater Than the Sum of its Parts"). It is generally defined as multiple-method research that focuses on complex social units or entities (or "cases") in their entirety, while maintaining the cohesiveness of the entity throughout the research process rather than reducing the outcomes to categorical data. Two examples of case-centered research are: case studies – e.g., an examination of a city social program – and narrative research – e.g., a study of chronic illness among sufferers.

Ethical considerations are important in every research method involving human subjects but they take on added significance in case-centered research where researchers often work closely with research participants over a period of time and frequently in the face-to-face mode (where researcher-participant relationships play an important role in the research outcomes). Both case study and narrative research gather a great deal of highly detailed information on each case, e.g., a case study may collect a detailed account of a particular social program; or a narrative inquiry may result in long, very personal stories associated with a chronic illness. In these types of studies, the possibility of inadvertently exposing participants' identities (without their permission) runs high unless preventive measures are taken.

This is why the use of informed and voluntary consent as well as approval from institutional review boards (when required) is critical in case-centered research. Consent involves disclosing the various aspects of the research, emphasizing the voluntary component, promising to keep participants safe, and paying particular attention to vulnerable population segments (e.g., children). Yet these efforts need to go further. Case-centered researchers must also effectively communicate the confidential nature of the research and take extra precautions to ensure participants' right to privacy – which can be particularly challenging when only one case is the focal point of the research (e.g., a city social program). For this reason, it is not uncommon for case study and narrative researchers to maintain participants' anonymity in their final reports by changing participants' names as well as the names of the characters and places revealed in the course of the research.

The path that these ethical considerations – consent and anonymity – take in the research design is also important. The skilled researcher will think carefully about how and when to incorporate these

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ethical standards while maintaining the quality and integrity of the data. For instance, narrative researchers are reluctant to reveal "too much" regarding the study objectives at the onset of an interview in fear of biasing the participant's narrative. These researchers balance the ethical obligation of informed consent with the need for quality outcomes by, among other things, gaining consent twice, i.e., before the interview and again at the completion of the interview, and by conducting a thoughtful debriefing with each participant.

Case-centered researchers also need to give thoughtful attention to anonymity and its impact on the final outcomes. Specifically, researchers must address questions such as: How will anonymizing the data introduce bias or error by way of changing context? and How will de-identifying the data alter its interpretation? These are important questions because the answers may determine how or *if* the data is used.

Ethical considerations revolve around transparency and safety, with safety broadly defined in terms of both physical and psychological harm, including the potential harm associated with the invasion of privacy and confidentiality. However, ethical considerations cannot (should not) be contemplated in a vacuum. Researchers – particularly case-centered researchers – need to carefully incorporate these ethics while also ensuring the quality of the research results.

Image captured from: http://digiday.com/platforms/anonymity-apps/

Article pertaining to: Researcher Bias

Paying Attention to Bias in Qualitative Research: A Message to Marketing Researchers (& Clients)

Researchers of all ilk care about bias and how it may creep into their research designs resulting in measurement error. This is true among quantitative researchers as well as among qualitative researchers who routinely demonstrate their sensitivity to potential bias in their data by way of building interviewer training, careful recruitment screening, and appropriate modes into their research designs. It is these types of measures that acknowledge qualitative researchers' concerns about quality data; and yet, there are many other ways to mitigate bias in qualitative research that are often overlooked.

Marketing researchers (and marketing clients) in particular could benefit from thinking more deeply about bias and measurement error. In the interest of "faster, cheaper, better" research solutions, marketing researchers often lose sight of quality design issues, not the least of which concern bias and measurement error in the data. If marketing researchers care enough about mitigating bias to train interviewers/moderators, develop screening questions that effectively target the appropriate participant, and carefully select the suitable mode for the population segment, then it is sensible to adopt broader design standards that more fully embrace the collecting of quality data.

An example of a tool that serves to raise the design standard is the reflexive journal. The reflexive journal has been the subject (in whole or in part) of many articles in *Research Design Review*, most notably "Interviewer Bias & Reflexivity in Qualitative Research" and "Reflections from the Field: Questions to Stimulate Reflexivity Among Qualitative Researchers". A reflexive journal is simply a diary of sorts that is utilized by the qualitative interviewer or moderator to think about (reflect on) how his/her assumptions or beliefs may be affecting the outcomes (i.e., the data). It enables the researcher to re-assess (if necessary) his/her behavior, attitude, question wording, or other aspects of data collection for the purpose of mitigating distortions in the data.

The reflexive journal appears to be a particularly vague or foreign concept among qualitative marketing researchers (and marketing clients) given the absence of discussions concerning this tool in their research designs. Why is this? Is there a belief that interviewer/moderator training

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sufficiently guards against potential bias? Is there a belief that all qualitative research is biased to some degree – because, after all, it isn't survey research – so any attempt at mitigation is futile (which, of course, begs the question, 'Why bother with qualitative research at all?')? Is there a head-in-the-sand (i.e., not-wanting-to-know) mentality that refuses to think of the interviewer/moderator as someone with assumptions, beliefs, values, and judgments but rather as a "super human" who is able to conduct a semi-structured in-depth interview (IDI) or focus group discussion devoid of these human qualities (i.e., lacking humanness)?
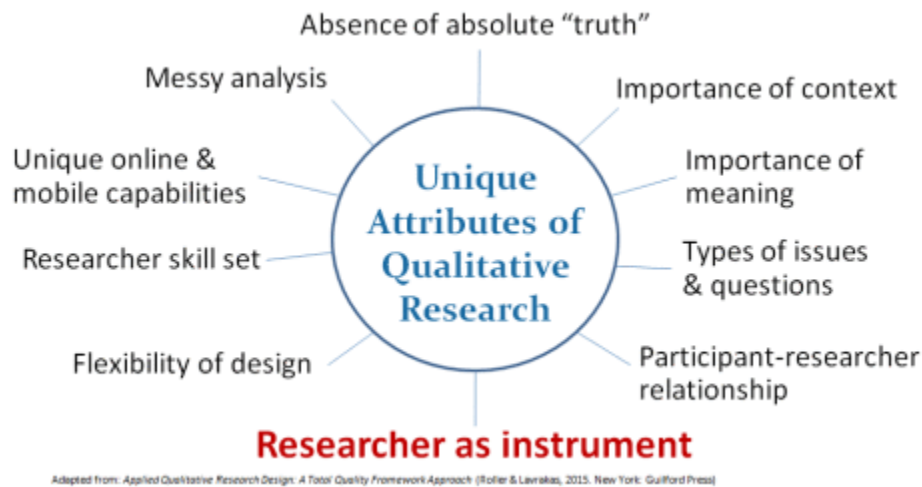
The humanness in all of us is worthy of reflection. And in qualitative research design this reflection can be put to good use mitigating bias in our data. As the interviewer considers how certain behavior may have elicited responses that were not true to the participant, or the moderator reflects on how his/her favoritism and attention towards a few focus group participants over others shifted the course of conversation and the outcomes of the discussion, these researchers are using their introspection to improve the research by moving data collection (and data outcomes) to a higher standard. This is how interviewers learn to adjust the interview guide or consciously alter their behavior during an IDI to gain more accurate data, or the moderator comes to understand his/her own prejudices and finds corrective techniques to become a more inclusive moderator and ensure an even-handed approach to the discussion.

Two important and unique attributes to qualitative research methods are the "researcher as instrument" component, i.e., the researcher is the data collection tool, and the participant-researcher relationship. These attributes speak to the humanness that both enriches and complicates the social-exchange environment of the IDI and focus group discussion. And it is this humanness – embedded in qualitative research – that should obligate marketing researchers to consider its import in achieving quality outcomes. If marketers care enough about the integrity of their data to adopt high standards in training, recruiting, and mode, why not care enough to mitigate bias in data collection by utilizing tools – such as a reflexive journal – to seriously examine the human factors that potentially increase inaccuracies and error in the final data?

Image captured from: https://gone-fishin.org/2012/01/31/burying-ones-head-in-the-sand/

Article pertaining to: Researcher Bias

Mitigating Researcher-as-instrument Effects

Adapted from: *Applied Qualitative Research Design: A Total Quality Framework Approach* (Roller & Lavrakas, 2015. New York: Guilford Press)

There are 10 unique attributes associated with qualitative research. These were discussed briefly in an article posted in this blog back in 2013. One of the most fundamental and far-reaching of these attributes is that the qualitative researcher is the "instrument" by which data are collected. The data-gathering process in qualitative research is facilitated by interviewer or moderator guides, observation grids, and the like; however, these are only accessories to the principal data collection tool, i.e., the researcher or others on the research team.

As the key instrument in gathering qualitative data, the researcher bears a great deal of responsibility for the outcomes. If for no other reason, this responsibility hinges on the fact that this one attribute plays a central role in the effects associated with three other unique attributes – context, meaning, and the participant-researcher relationship. On the one hand, the researcher-as-instrument reality in qualitative research has the positive effect of enabling the researcher to utilize context and the participant-researcher relationship to discover substantive meaning; yet, it is this closeness and intimacy that potentially threatens the integrity of the data gathered. And it is this compromised data that distorts the meaning, interpretations, and ultimate usefulness researchers derive from their research studies.

This is why it is important to think carefully about qualitative research design and take steps to mitigate researcher-as-instrument effects. Researchers do this, for example, when choosing the mode for any particular study, thinking through the strengths and limitations of each mode given the target population and research objective. Qualitative researchers also mitigate researcher-as-instrument effects by how they develop their interview and moderator guides, e.g., their use of the funnel approach. And, of course, researchers' skills are clearly essential to circumventing possible bias during data gathering; skills that focus on building participant-researcher rapport, active listening, identifying contradictions, and avoiding inconsistency.

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As the all-important tool or instrument in collecting qualitative data, the researcher embodies the definition of what it means to conduct qualitative research. It is this role that portends the rich, meaningful information we expect from qualitative research, but also signals unwanted effects that demand careful attention to research design.

Qualitative Research "Participants" Are Not "Respondents" (& Other Misplaced Concepts From Quantitative Research)

There are many ideas or concepts that a quality approach to qualitative research borrows from quantitative research design. Representativeness of the target population is one example. Well-crafted techniques to maximize cooperation among recruited participants in order to minimize

nonresponse effects are another example. And adequate interviewer/moderator training that provides the necessary skills to mitigate possible bias, while also controlling for participant effects, is yet another example. In fact, there is any number of lessons that qualitative researchers can learn from survey research in terms of sound research principles that positively impact the usefulness of the outcomes.

But to assume that there is a direct relationship between qualitative and quantitative research would be a grave mistake. As discussed in an article posted in 2013 – "10 Distinctive Qualities of Qualitative Research" – the design, implementation, analysis, and interpretation of qualitative research make it unique and uniquely suited to go beyond survey research to study the complexities and meaning of the human experience.

And yet, researchers – both qualitative and quantitative – regularly overextend the applicability of quantitative ideas to qualitative research design. Although survey research informs the researcher of the basic elements of "good research" – and draws the researcher's attention to core criteria dealing with sampling, error, bias, and so on – many quantitative concepts and techniques cannot and *should not* be considered in qualitative research. Here are just four examples:

Generalization. It may seem obvious to most researchers that the limited and highly variable nature of qualitative research makes it a poor predictor of things to come; however, many researchers have advocated the "generalizability" of qualitative data. Whether to further a budding theory or make assertions about an entire population segment, the concept of generalization in the context of qualitative research comes up often. In referring to the case study method, for instance, Earl Babbie, in his seventh edition of *The Basics of Social Research* (2016, Wadsworth Publishing), laments "the limited generalizability of what is observed in a single instance of some phenomenon," stating further that "this risk is reduced, however, when more than one case is studied in depth" (p. 312).

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Qualitative research does not need generalization to be valuable but it *does* need transferability – i.e., the ability to transfer the qualitative design and/or outcomes to other highly specific contexts. Transferability is discussed in several *Research Design Review* articles, including this one posted in 2013.

Percentages & data graphs. Qualitative researchers have been known to use percentages to report various aspects of their findings, such as Smith (January 2011, *The Qualitative Report*, 103-125) who reports on her qualitative study of students' behavior when searching the Internet for HIV/AIDS information, stating that *"eighty percent of students regardless of race did not know how to properly search for online health information."*

There is also a tendency to use graphs or charts of some sort to display the data. Illustrations can be useful to help visualize qualitative data but there is no reason why the researcher needs to fall back on bar graphs or pie charts. Even when no percentages are used – e.g., the histograms of tagged content made available by online discussion platforms – the appearance of a quantitative-like data display not only hints that the researcher believes the qualitative data are quantifiable but also serves to ignore the whole point of qualitative research – i.e., the analysis of context and personal meaning – by reducing the data to a graphical configuration.

"Respondent." The survey respondent is appropriately referred to as a "respondent" because that is exactly the role he or she is playing in the research process. He or she is responding to the researcher's questions which are typically structured and closed-ended in format. Similarly, the qualitative research participant is suitably labeled "participant" because his or her role goes beyond simply replying to a series of questions to encompass participation in the research on many levels. The participant elaborates on the interviewer's/moderator's questions, changes the topic if need be to convey an idea, takes part in a social relationship with the interviewer/moderator, engages with other participants in a focus group discussion, is willingly observed in an ethnographic study, and, in some instances, is asked to aid in the analysis. For all of these reasons (and more), it is research *participants* that provide qualitative data not respondents.

Rotating or randomizing the order of stimuli. The fourth example of a quantitative concept that has been improperly attached to qualitative research pertains to the order in which stimuli – documents, storyboards, images, etc. – are presented to research participants. There is a 2010 *RDR* post on this topic – see "Standing the Discussion of Rotation in Qualitative Research on its Head" – where the rationale for not rotating stimuli in qualitative is spelled out. The key takeaway from that article is that, unlike quantitative research design which incorporates various control measures, qualitative research thrives in an uncontrolled environment where the people, geography, and researcher-participant input change within and across research events (e.g., interviews, focus groups). This variability is an inevitable component to finding the context and meaning qualitative researchers are looking for, but it also means that making sense of the data and *discerning meaningful differences across segments of the target population* is a very "messy" process.

There is, however, one thing the researcher *can* control that will aid in finding meaningful differences. This is the order in which stimuli are presented to participants from interview to

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interview or group to group. By keeping the order the same, the researcher can "see" what and how variations emerge. To do otherwise – that is, by rotating the order of stimuli – the researcher has made it impossible to detect meaningful differences across target segments of the population (e.g., Do younger people really feel differently about the stimuli compared to older people?) *and*, unlike survey research, the qualitative researcher cannot say anything about the rotation effect or the order bias that was introduced with each new rotation.