

# Qualitative Research Design:

## Selected Articles from *Research Design Review*

Margaret R. Roller

*Research Design Review is an online blog that began in November 2009 with the intention of providing suppliers, end-users, and students of qualitative and/or quantitative research with a resource for thinking about and discussing research design issues. RDR addresses the basic question, "Is it good research?" - meaning, does the research design (regardless of method) adhere to common standards or principles that are generally agreed to support some degree of confidence in our research findings. RDR currently includes over 40 posts concerning quantitative and qualitative research design issues. This paper presents a selection of articles from RDR specific to qualitative research design. It is hoped that greater awareness and understanding of the factors impacting qualitative research design will lead to more useful, higher-quality outcomes.*

**Roller Marketing Research**

**[www.rollerresearch.com](http://www.rollerresearch.com)**

**[rmr@rollerresearch.com](mailto:rmr@rollerresearch.com)**

**October 2011**

# Table of Contents

<b>Focus Group Research: A Best Practices Approach.....</b>	<b>1</b>
<b>Qualitative Research &amp; Thinking About How People Think .....</b>	<b>2</b>
<b>Qualitative &amp; Quantitative Research Designs: Wading into the Stream of Consciousness.....</b>	<b>4</b>
<b>Qualitative Best Practice: Maximizing Individual Response.....</b>	<b>5</b>
<b>Qualitative Research as Entertainment: Taking Ownership of the Research Process.....</b>	<b>6</b>
<b>Error in (Qualitative) Research.....</b>	<b>7</b>
<b>The Pitfall of Bulletin Board Qualitative Research.....</b>	<b>9</b>
<b>Qualitative Research: Use of Projective Techniques Depends on Objectives.....</b>	<b>10</b>
<b>How People Think (Part Deux): Validity is Valid in Qualitative Research.....</b>	<b>12</b>
<b>Standing the Discussion of Rotation in Qualitative Research on its Head.....</b>	<b>13</b>
<b>The Complexity of Contexts &amp; Truths in the Focus Group Discussion.....</b>	<b>14</b>
<b>The Messy Inconvenience of Qualitative Analysis.....</b>	<b>15</b>
<b>13 Factors Impacting the Quality of Qualitative Research.....</b>	<b>16</b>
<b>The Key to Successful Executive Interviewing: Up Close &amp; Personal.....</b>	<b>18</b>
<b>Visual Cues &amp; Bias in Qualitative Research.....</b>	<b>20</b>
<b>Can You Hear Me Now? Listening in Qualitative Research.....</b>	<b>21</b>
<b>Can We Reduce Gender Differences in Qualitative Research?.....</b>	<b>23</b>
<b>Selection Bias &amp; Mobile Qualitative Research.....</b>	<b>24</b>

# Focus Group Research: A Best Practices Approach

November 9, 2009

Focus group research shares many of the concerns and issues associated with quantitative. Both adhere to research principles that serve to maximize users' confidence in the research findings. But, while quantitative design and analysis issues are openly examined among various marketing research publications (such as *Marketing Research*) and associations (such as AAPOR), corresponding public methodological discussions concerning focus group research are relatively few. Guidelines and white papers (proprietary or otherwise) on core competencies and procedures exist, yet there is a void of meaningful discourse that would bring methodological priorities into focus for the discipline. No less than quantitative, focus group marketing research merits discussions pertaining to a variety of design components, such as: screener development (questionnaire design), the moderator's guide (question wording and context effects), the use of specific techniques (control for bias and analyzability of the results), and the analytic process (accuracy of conclusions and recommendations).

A systematic, thorough investigation or at the least, a robust ongoing industry-wide conversation concerning these and other issues will provide an important look into focus group research. The outgrowth of these analyses will be to remove any black-box perceptions of focus group research, add transparency to the process, and ultimately offer research users greater justification and substantiation for the findings. 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.

[This is an excerpt from a working paper titled, "[Focus Group Research: A Best Practices Approach](#)." Future posts will discuss the various issues concerning best practices presented in this paper as well as other topics relevant to qualitative & quantitative research design.]

# Qualitative Research & Thinking About How People Think

February 12, 2010

Whether we know it or not researchers are always thinking about how people think. Whether it is explicit or implicit in our work, we are thinking about how people think from the very beginning of the conceptualization of research design to through to the very end of 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 & 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 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), Sudman, Bradburn, & Schwarz (1996), and Bradburn, Sudman, and Wansink (2004) are just a few examples of the 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 apply in the quantitative realm then surely they apply to research forms devoted to in-depth conversations and elaborate probes that ladder to key benefits in the qualitative arena.

I would argue that cognitive-process theories are as relevant and important to qualitative marketing research as they are to quantitative. For example, let's look at optimization<sup>1</sup> and satisficing<sup>1</sup> 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 studies typically involve a limited number of stimuli and moderators/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 is "good enough," or satisficing, is greatly reduced. Applied to the use of concept boards and other stimuli in focus groups, one could argue that the concept of primacy and recency effects are irrelevant in focus group research and, while randomizing the presentation order of stimuli is de rigeur in quantitative, not so in qualitative. To the contrary, I would suggest that *not* randomizing across group sessions adds a necessary component of control.

So, what do you think? What do you see as the role of cognitive-process theories in qualitative marketing research? A contribution to this discussion is most welcomed.

<sup>1</sup> Optimization 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]

## Reference

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

Sudman, S., Bradburn, N., & Schwarz, N. 1996. *Thinking About Answers*. Jossey-Bass.

Bradburn, N., Sudman, S., & Wansink, B. 2004. *Asking Questions: The Definitive Guide to Questionnaire Design – For Market Research, Political Polls, and Social and Health Questionnaires*. Jossey-Bass.

# Qualitative & Quantitative Research Designs: Wading into the Stream of Consciousness

March 16, 2010

William James in *The Principles of Psychology* (1890) talks about Five Characters in Thought. Number three on the list is “Within each personal consciousness, thought is sensibly continuous.” His idea was that, although ever-changing, consciousness “does not appear to itself chopped up in bits [or] jointed” but rather “it flows” like a river or stream. So what we call someone’s cognitive experience is really, what James called, a “stream of thought” or “stream of consciousness.”

This is an important concept in qualitative and quantitative research because the underlying purpose in our designs is to understand the subjective links within each individual (consumer, BTB customer, employee, volunteer) respondent/participant. Our attempt to “connect the dots” i.e., understand each person’s reality as it relates to the topic at hand by tapping into their stream of thought “drives our choice of mode, question development, and analysis protocol.

So, how do the most-oft used marketing research designs stack up? How well do they reveal the streams of consciousness that have the most impact on ultimate behavior? In 1987 ([read the article](#)), I wrote that the “classic telephone interview” falls short in its reliance on close-ended responses to prescribed questions in a structured format and that a more qualitative (specifically, in-depth interview) approach was a necessary adjunct to this and other traditional quantitative designs. I argued that an in-depth dialog was needed “to reveal the psychological flow that results in consumer action or inaction.” While admitting to the cost and turnaround hurdles of a qual-quant design, there are clearly benefits to be gained from a glimpse of the river of thought, carrying with it the essential ingredients “demographic, lifestyle, psychographic” that define how each individual gets to a particular consequence in consumer (business, employee, volunteer) behavior.

A lot of innovation has occurred since 1987 and researchers have increasingly embraced new ways to think about research design in marketing research. The adoption and integration of the latest technology is an obvious example. But one of the most important by-products of the inclusion of technology modes into our design arena is the surfacing of serious discussions and applications of multi-mode designs in the industry. This is a good thing because multi-mode designs have the potential of bringing us closer to the reality of respondents’ flow of thought. [iModerate’s Research>iMPact](#), that incorporates qualitative moderated interviews into quantitative studies, is just one case of hybrid research solutions that are currently on the front burner.

This is all to say that I am encouraged by our new thinking in research design and optimistic that we will use the resources and capabilities at hand to unearth the streams of consciousness that will enable us to wade nearer to human realities.

## Reference

James, W. 1890. *The Principles of Psychology*, vol. 1. Dover Publications (New York, 1950).

# Qualitative Best Practice: Maximizing Individual Response

March 31, 2010

An [earlier post](#) to this blog discussed the idea that qualitative research, namely focus groups, shares many of the research-design issues or concerns associated with quantitative marketing research. This commentary was an excerpt from a working paper titled [“Focus Group Research: A Best Practices Approach”](#) and was intentionally non-specific; opting rather to use the initial post to emphasize that “no less than quantitative, focus group marketing research merits discussions pertaining to a variety of design components” and to call on “a robust ongoing industry-wide conversation” regarding best practices. Today’s post (also partly excerpted from the working paper) talks about the important role of individual response in qualitative design.

One of the “design components” shared by quantitative and qualitative (such as focus group) research has to do with the researcher’s sensitivity to the unique contribution each respondent/participant brings to the research process. Quantitative and focus group research schemes are equally interested in individual attitudes and behavior – quantitative methods in a highly-structured, wide-spread sort of way (breadth) and focus groups via a highly-interpersonal approach (depth). In many instances, focus group research individualizes quantitative further by deriving meaning and context to survey data that is often masked by necessary standardization and coding. Like quantitative, focus group research methods respect individuality, knowing that the ability to maximize the quality of individual response contributes greatly to the accuracy and usability of the outcome. Focus group efforts show regard for the individual participant in the carefully crafted recruitment (screening) process, the use of probes, and by enabling a meaningful contribution from each participant in a safe research environment.

This attentiveness to the individual is part and parcel with the typically-quantitative constructs of reliability and validity. These constructs are rarely (ever?) uttered in the same breath with qualitative research yet the essential underpinning of these concepts – trustworthiness, quality, dependability – are germane to all research designs. In focus group research, the moderator’s control of question administration (by probing and clarifying questions on the spot to unearth any possible misinterpretations or alternative meanings) assures that the intended question (or necessarily re-worded question) is indeed the question being answered. It is this question-answer validation – enabling the researcher to maximize the quality of individual responses – that powers the critical advantage and ultimate usefulness of focus group research.

So why do so many moderators relinquish one of the key benefits of qualitative research – question-answer validation – by employing group or team-activity projective techniques? It has never been clear to me what the researcher gains by asking two or more group participants to create a collage or sort a picture deck, or asking an entire focus group to embellish each other’s scribbles in “pass the doodle.” While entertaining, projective techniques that move away from a concern for the individual can easily lead to superficial “insights” based on analyses of a team effort full of compromise, acquiescence, or disjointed scribbles.

A best-practices approach to focus group (and all qualitative) design entails an understanding of the impact individual response has to the integrity of the research.

# Qualitative Research as Entertainment: Taking Ownership of the Research Process

April 16, 2010

It has long been suggested among the less-initiated that attending a focus group is not unlike a theatre-going experience. While I am not sure where this notion came from, some have argued that it is the one-way mirror that has been instrumental in transforming facility-based qualitative research (focus groups & IDIs) from a real-world laboratory research method to a production complete with audience and staging. Frank Kennedy ó a long-time practitioner and teacher of qualitative research who died in 2006 ó planted his tongue firmly in his cheek to describe the impact the one-way mirror has had on recruiters and facility owners. He quips ó

*“Recruiters and facility owners woke up to the fact that they were theater owners and casting agents, that respondents must be entertaining, and that like good troupers, they could be taught to play different parts – product users one day, product non-users the next. They started to design theaters complete with bars, Klieg lights, built-in mikes and cameras, even two-tiered viewing rooms just like the balconies and loges of the old traditional theaters. They stopped asking [their clients] dumb questions like ‘How was the recruiting?’ and started to think like theater people: ‘How did you like the performance? Was there enough Jack Daniels? I hope you were pleased with Mary Jayne, she’s always been popular here.’”*

And as for moderators/interviewersí .

*“They learned that what’s good research is often bad theater: endless, boring probing; the same questions group after group; no amusing put-downs, no clever projectives; deadbeat respondents who never talked up. It didn’t take long for them to insist on articulate interesting actors, and to forget this nonsense about representative samples.”*

A wild, misguided premise you say? I am not so sure. You don’t have to look far to find qualitative facilities who have designed elaborate, attractive promotional material emphasizing location, comfort (over-the-top amenities), and terrific food (some with their own chefs!); while containing little or (gasp) nothing on recruiting, the research process, their quality measures, or success rate

One can also argue that moderators and to a lesser extent interviewers have played to the audience with toolboxes brimming with projective techniques that are fun for the participants and wake-inducing for the viewers in the back room. Are these techniques hatched in the name of good research design? Do these techniques provide the necessary fodder for sound analytics? Can we rely on these techniques to lead us to actionable results? The answer is maybe. Yes if the focus is on design and analysis, no if the focus is on the one-way mirror.

The one-way mirror, of course, is a scapegoat. The degree to which qualitative research (esp., focus groups) have become a source of entertainment is really a function of the researchers and research end-users. Both providers and users alike need to take ownership of the research process. We all need to ask ourselves and each other, “Is it self-serving theatrics or is it good research?”

## Reference

Kennedy, F. 1991 or 1990. “The Moderator of the Year.” [QRCA](#) newsletter.



# Error in (Qualitative) Research

May 14, 2010

It should be pretty obvious from my earlier posts that I am a big believer in the idea that research design is governed by core principles that apply to everything we do. I believe that it is not good enough to be a qualitative researcher or a quantitative researcher or an online researcher or an ethnographer or whatever. That, regardless of our mode or technique, we are obligated as researchers to practice "good research" defined by adhering to basic tenets that we all should have learned in school. Unfortunately, college marketing research courses may fuel silo thinking in research design by organizing in-class discussions around research "classifications" rather than focusing on the discipline of research itself. It might not be a bad thing if students of marketing research were required to take research methods classes across fields — such as psychology, sociology, and political science — to gain an appreciation for the fundamentals of this thing we call "research." In this respect I have often thought that I would like to come back in another life as a methodologist. Not too dissimilar from what Bill Neal of [SDR](#) discussed back in 1998<sup>a</sup>, i.e., as someone who has "specific education in, and knowledge of, a variety of converging disciplines" that would enable me to evaluate and craft efficient, powerful research designs. I published a short article on the idea of [qualitative researchers as methodologists](#) in 2001. I am nothing if not consistent.

What I really want to talk about is error. The preceding remarks were not so much a diversion as a reminder that, yes, it is okay to talk about error in the qualitative as well as the quantitative realm.

Both quantitative and qualitative research designs are typically shaped to ensure that responses to research questions are heard correctly and to improve the accuracy of analyses. The potential for achieving both these aims — accuracy in response interpretation and analysis — is realized to the extent that certain parameters are utilized in the conduct of the research. Quantitative studies, because of the structured design, can control for or logically theorize about sampling and non-sampling errors. Errors in qualitative research, on the other hand, are not as easily seen, yet they exist to a high degree and are often willingly introduced by the researcher. Knowing that error exists in (for example) focus group research is problematic because all researchers aim for confidence in their findings. Being highly aware of error introduced by convenience samples, as well as non-sampling errors (such as interviewer and selection bias in recruiting, moderator and response bias in the discussions themselves), qualitative researchers build in measures to control error in their selection and interviewing procedures similar to their quantitative colleagues (e.g., questionnaire design protocol in recruiting screeners, properly trained recruiting interviewers, non-leading interview techniques).

The notion of error in qualitative marketing research is rarely discussed but a concept worth exploring. Without it, qualitative research is weakened under scrutiny and simply becomes an exercise where all ideas are "good ideas," where individual differences don't matter, and where all responses to qualitative questions are legitimate. Some might go further and say that focus group research devolves into a haphazard process of ransacking the moderator's projective toolbox. If this was true (which it is not), researchers wouldn't incorporate any controls into their qualitative research designs or care too deeply about analysis. But as researchers we *do* care about the design and analytical elements of our qualitative research because we care about the transparency of the processes and the degree of confidence by which we can report study findings.

Error ó controls ó transparency ó confidence in results. These are all issues that I come back to time and again. Am I building my own list of core research principles?

## Reference

Neal, William D. ["The Marketing Research Methodologist"](#). *Marketing Research Magazine*. Spring 1998.

# The Pitfall of Bulletin Board Qualitative Research

May 31, 2010

This past week I attended a Webinar concerning online bulletin boards sponsored by an online research provider. The focus of the presentation was on their fairly new bulletin board platform that incorporates several novel bells and whistles from their earlier version. I was quite impressed by the degree of flexibility and richness the technology offers, with features that enhance not only participant engagement but also that of the moderator and virtual backroom client viewers ó e.g., the ability to embed multimedia stimuli and activities, enable participant-generated content (think, personal ethnographies), and easily multi-task between responding to participants' posts on the one hand while managing the backroom on the other.

Of course, it is not surprising that a technology as rich as this has the capability of going way beyond run-of-the-mill facilitation and can offer researchers new tools in question formatting and analysis. No longer must the moderator settle for open-ended questions fostering unwieldy responses that are difficult to analyze. The current bulletin board platforms allow moderators to create very quantitative-like multiple-choice questions ó "How satisfied are you with paying bills online? Would you say: very, somewhat, not too, not at all satisfied?" ó as well as force participants to answer by making a question response mandatory. From there, moderators can choose to label participants by their forced responses which they can then use to segment the group by type. With this segmentation, the moderator can go on to modify discussion probes by type of participant and ultimately analyze research findings by segment with (gulp) the visual help of charts and graphs.

Nifty in some ways ó How many moderators have lost track of who within the group loves paying bills online and the person who constantly has problems? ó but what kind of research are we doing here? Bulletin board research is a useful qualitative method resulting in virtual reams of in-depth content, just the stuff that is the fabric of qualitative research. What is not qualitative research, however, is the restriction imposed by close-ended questions and the subsequent packaging of participants into tidy categories that fit nicely in a pie chart. The reason that qualitative research is such a wonderful counterpoint to quantitative is that it acknowledges that people are immersed in complicated lives that are frequently impossible to typecast. Qualitative rejoices in the nuances that differentiates us all.

So, I'm left embracing online bulletin boards as a qualitative method. But I would encourage researchers and end-users alike to design their bulletin boards in the open, free spirit of qualitative research. I encourage all of us to use this forum as we would the face-to-face format; that is, to gain an understanding and appreciation for the messiness of human existence, and resist giving up the richness of qualitative for the absoluteness of compartmentalization formed from structured interviewing. Online technology has brought researchers to a new realm of responsibility, one that requires a concerted focus on the (qualitative or quantitative) objective of our designs and the tools we use to achieve them.

# Qualitative Research: Use of Projective Techniques Depends on Objectives

June 30, 2010

A qualitative research study whose primary goal is to generate as many ideas as possible (e.g., to help launch a new product, service, or name) is different than a qualitative study that sets out to gain insight into the behavior and attitudes among a target group. The former is exemplified by ideation sessions where, for all intents and purposes, every idea is a good idea. The other type of qualitative research objective is far more focused in nature, directed at uncovering an in-depth understanding of an individual's lifestyle and point of view, and where ideas are only as good as the degree to which they complement an individual's mindset.

This distinction in objectives is important to qualitative research design because it can greatly impact mode (e.g., face-to-face, online), recruitment specs, as well as interviewing style, content, and analysis. And it is this very last piece of the analysis that I find most critical because, in the end, responses to a researcher's questions have to be analyzable. We have to be able to say something about what happened in the research in order to provide the actionable results our clients (should) demand. So, a reasonable question for all researchers (qualitative or otherwise) throughout the process is, "Can I analyze this?" or "Does this step in the design improve or interfere with my ability to conduct an honest analysis that makes me feel secure in the actionable findings I present to the client?"

Stimulating divergent thinking among a group of individuals to produce a free-flow of ideas is fostered by using any number of creative techniques. The goal here is to facilitate the group's ability to make out-of-the-box connections and work with each other to produce many possible solutions to any given issue. Projective techniques of all kinds can work well in these ideation sessions and, indeed, it is not unusual for focus group moderators to experiment with or "try on" a variety of projectives to maximize rich input from participants. These techniques might include team as well as individual exercises that motivate participants to look at a topic in a new way and build on each other's thoughts.

While we are all in the business of gathering ideas, the objective of my qualitative work is generally on understanding individual behavior and attitudes from which new ideas emerge. This is different than brainstorming for as many ideas as possible. I am really not interested in how creative a group of participants can be or how many different ways they can look at an issue. Instead, I am interested in how they think and how that thinking impacts what they do as related to the topic at hand. I also care about how people talk as well as the group dynamics and its effect on individual thinking.

With all this concern about thinking you could assume that I love to use projective techniques such as the collage. But I don't. I don't because to truly understand any one person's collage I really need much more than the scant few minutes I have within a 2-hour group session to hear their interpretation of the collage and really "get" the importance of that interpretation for that particular individual. I am not a therapist running weekly clinical sessions with this person; but rather a total stranger who knows very little about all the things in this person's life that are now somehow woven into a force-fed (must-do) collage.

And for similar reasons I generally rule out projective exercises that assign two or more participants to work together. A team activity often results in a compromise of some sort, requiring an unbundling by the moderator to unearth the individual thinking that lies within (assuming that the dominator in the team hasn't totally stifled individual thought). Teams are great for generating lots of ideas but not so useful when the researcher needs to connect ideas to individuals or how they think and how that impacts past and future behavior.

These, and other projectives or pass the doodle, personifications, analogies or which require an undoing to gain true meaning, potentially mask our objectives and hinder analysis when our goal is not quantity of ideas but the reality of how people think.

# How People Think (Part Deux): Validity is Valid in Qualitative Research

July 19, 2010

Back in February I posted a discussion concerning [Qualitative Research & Thinking About How People Think](#). In it I argued for the idea that if cognitive principles apply in the quantitative realm then surely they apply to research forms devoted to in-depth conversations and elaborate probes that ladder to key benefits in the qualitative arena. I go on in that post to focus on cognitive-process theories of specifically optimization and satisficing and how they can inform a well-designed approach to qualitative marketing research.

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. And 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 of trustworthiness, quality, dependability are germane to all research methods. [William Trochim](#) and others have [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 by the fact that questions can be probed for clarification and mis- (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, esp., 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.

Validation has an important role in qualitative research. Qualitative researchers know this and exploit their ability to validate questions as well as answers, esp., when the research is being conducted face-to-face or via telephone. The jury is still out as to whether a computer-assisted mode (e.g., online bulletin boards, online communities or panels) adequately facilitates the rich probing of the validity that is a central benefit to conducting qualitative research.

# Standing the Discussion of Rotation in Qualitative Research on its Head

August 11, 2010

Qualitative researchers are pretty good at distancing themselves from their quantitative colleagues, even to the point of bragging about their anything-goes right-brain sensibilities in contrast to the structured life of quantitative. So it boggles the mind when qual researchers so easily embrace certain quantitative concepts. One such concept is the randomization of stimuli in survey design in order to reduce primacy and recency effects.

I touched on this briefly in a February post when I discussed the relevance of cognitive-process theories in qualitative research ([Qualitative Research & Thinking About How People Think](#)). In that post, I argue that *the concept of 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, I would suggest that not randomizing across group sessions adds a necessary component of control.*

So, why is a *component of control* important and how does that relate to whether the moderator randomizes or (more common in qualitative) *rotates* discussion stimuli such as concept boards? I have discussed the answer to this question in many private conversations with qualitative researchers who frankly have been quick to resist the idea of control in any form which of course stifles a true discussion. In one such conversation *ó* after much talking around the issue *ó* I ultimately resorted to a graphic, 4-slide depiction of my explanation. I present it [here](#).

# The Complexity of Contexts & Truths in the Focus Group Discussion

October 17, 2010

I find myself often thinking and writing about qualitative research design because, well, there is a lot to think and write about. While there is a multitude of books, articles, experimentation, debates, and forums on the efficacy of various quantitative approaches and techniques, there is very little on qualitative design in the marketing research world. This partially stems from the fact that there are many qualitative researchers who shun the idea of design issues, resting their case on the notion that a focus group discussion is simply an informal gathering of people where any "tool" that elicits a response is good and where design principles have no place.

Until marketing researchers (and their clients) are willing to address the implications of their qualitative designs, it is left to others to delve into these pesky issues. [Jocelyn A. Hollander](#), a sociologist from the University of Oregon, is one such person. Dr. Hollander published an article in the [Journal of Contemporary Ethnography](#) in 2004 titled, "The Social Contexts of Focus Groups" where she argues that the focus group environment presents a complex interaction of situations that shape the "truths" we hear from participants. She goes on to say that participants do not harbor one single truth to a discussion topic but instead respond with only the truths that develop from the contexts (the complex group environment) the participant finds him/herself in. These contexts can arise from demographics (e.g., the gender, age, and racial makeup of the group), associations (e.g., the relationship of group participants to one another), and conversation (e.g., the person who first responds to a moderator's question). These within-group contexts create demands on participants that ultimately impact the discussion outcome. According to Dr. Hollander, group participants' responses are being shaped by the context, composition, and facilitation of the group and that participants strategically select "the narratives from amongst the multiple possibilities to fit the perceived demand of the situation." So the moderator might ask, "What truth am I hearing now, or is it a truth at all?"

The impact of contexts and the idea of multiple truths paint the picture of focus group participants as not "uncomplicated information storage facilities" but rather "contradictory mosaics" deserving greater considerations in our qualitative designs and analyses. Dr. Hollander asserts that we need "a more nuanced understanding of the contexts of focus groups" including more emphasis on the composition of our groups and a willingness to include a discussion of group dynamics "e.g., the order in which participants responded, the association of one group member to another" in our written reports. By understanding and analyzing the "interactional forces" of the group situation, we can more clearly appreciate how our participants are sharing truths, withholding other truths, or manufacturing new truths for our (and their) benefit.

Within the current flood of discussions on techno-centric "innovations" in research design, it is unlikely that the qualitative researcher will divert attention to study the complex social microcosm of the focus group or other qualitative design issues. But maybe there *will* be a time when marketing researchers will stop standing on the periphery grasping at the latest gadget for their bottomless toolbox and turn their efforts on finding the truth in their designs. One can hope.



# The Messy Inconvenience of Qualitative Analysis

November 16, 2010

Qualitative analysis is difficult. We can wish it wasn't so but the fact remains that the nature of qualitative research, by definition, makes analysis pretty messy. 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 those quantitative 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. 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.



The messiness of the interconnections, inconsistencies, and seemingly illogical input we reap in qualitative research demands that we embrace the tangles of our conversations by conducting analyses close to the source. While this means hours analyzing audio and/or video recordings, it is what is necessary. It is what we signed up for.

I am reminded almost daily of the challenge qualitative researchers face in analysis. I see this challenge when I read a recent article in [Quirk's](#) devoted to a structured approach to qualitative analysis; when a Twitter feed during [The Market Research Event](#) held earlier this month alerts me to several speakers espousing "better, faster, cheaper" qualitative research; and from my own studies which have lately involved turning over reams of written transcripts that have been misused and misconstrued by clients who cherry-pick the content.

So qualitative analysis is hard. We can use all the technology in the world to capture specific words and even sentiment but we can not make qualitative analysis something that it is not. [Catterall and Maclaran](#), in their 1997 paper, acknowledge that computer coding of responses has its place yet it sidelines the all-important role of group dynamics or *the human interaction* that takes place in the focus group setting.

As in everything we do, researchers want to understand [how people think](#). And our analytical efforts should acknowledge that people do not think in a straight line. Maybe it would be useful to take a lesson from [Mark Gungor](#) and imagine that our research participants are women whose brains consist of a "big ball of wire" where everything is connected to everything else, in contrast to men whose brains are "made up of little boxes" that are isolated and don't touch. Wouldn't it be nice if analysis was just about opening up a self-contained box, extracting neat thoughts, and moving on to the next box?



# 13 Factors Impacting the Quality of Qualitative Research

February 28, 2011

How does a client, an end-user, or buyer evaluate the quality of our qualitative research? How does this person know with any degree of confidence that the qualitative end-product is legitimately useful? We conduct the interviews and observations, deliver audio, video, and written analysis of our findings filled with implications and next steps, but how does anyone judge its efficacy as a piece of qualitative research?



We don't seem to have this problem in survey research. The countless discussions and experiments conducted on various aspects of survey design give ongoing support for a ["quality framework"](#) by which providers and users can gauge research results. To this end, quantitative researchers often talk about ["total survey error"](#) and ["fitness for use"](#) referring to the variety of potential errors and "dimensions" that impact the survey quality framework. By highlighting these errors, both researcher and end-user more fully appreciate research outcomes and understand what they have (or don't have). They understand, for instance, how the accuracy or projectable component of their research may have been sacrificed due to insurmountable budget or schedule constraints.

A quality framework is lacking in qualitative research. Beyond the basic dos and don'ts, there are no tested dimensions we can use to compare one qualitative study from another. While research-on-research is critical to improving the quality of what we do, the qualitative marketing research world has been blatantly absent from the investigative scene. In their 2001 paper (["Why We Need to Reassess Focus Group Research"](#)), Catterall and Clarke discuss the work that has been done in focus group research to better understand the effect of variables such as: the inclusion of professional participants, the presence of observers, and interviewer (moderator) effects. Yet much of this work is done outside the practitioner arena and industry-wide discussions (dare I say, experimentation) on these and similar issues are, for all intents and purposes, nonexistent.

Back in 1944, [Edwards Deming](#) developed a classification of potential error in survey research, identifying [13 "factors affecting the ultimate usefulness of a survey."](#) These factors include "variability in response," "bias and variation arising from the interviewer," "imperfections in the design of the questionnaire," among others. So, where is our list of factors impacting the quality of qualitative research allowing us to judge the usefulness of our efforts? One such classification scheme looks like this:

## 13 Factors Impacting the Quality of Qualitative Research

### The Environment

Potential variability associated with the:

- Particular venue/setting (incl., face-to-face and online)
- Presence of observers/interviewers as well as other participants (e.g., groups vs. IDIs)
- Audio & video recording

## The Dynamics

Potential variability associated with:

- Professional participants ([öcheatersö](#))
- Participantsøcultural/social/economic/gender/age diversity
- Cognitive processes/constructs
- Geographic/regional differences
- Dominators, group vs. individual think

## The Interviewer/Moderator

Potential variability associated with the:

- Personal/personality aspects of the interviewer/moderator
- öBestö techniques utilized for specific topics, type of participants, venue
- Question formatting
- Question sequencing
- Use of projective techniques (e.g., what to use when, impact on the discussion overall, analytical schemes)

# The Key to Successful Executive Interviewing: Up Close & Personal

March 25, 2011

The researcher's key to the executive suite is hanging in the spot where it has always been. Our entry into the consumer and other B2B worlds may have strayed towards mobile and online methods ó bulletin boards, surveys, communities, and social-media lurking ó but successful research with the corporate executive still lies in the warm, personal connections we make in the face-to-face mode. We can try to defend other approaches as more efficient (in time and cost), innovative, and sexy, but the reality is that nothing reaps the richness of a person (the professional interviewer) sitting with another person (the executive interviewee) for the sole purpose of exploring topic-specific attitudes and behavior.



If success is measured by the depth of input and insight then there are at least six necessary components to the face-to-face executive interviewing design model:

- **Positive preliminary contact & scheduling**

A successful executive interview begins with establishing a positive relationship with the interviewee prior to the interview, laying the foundation for the positive rapport necessary when the actual research interview is conducted. With this in mind, cold-calling is never appropriate. Not unlike The Ritz-Carlton ó whose [motto](#) is óWe are Ladies and Gentlemen serving Ladies and Gentlemen.ö ó researchers' professional approach to the executive interview will elicit a professional response.

- **Clearly-defined & achievable goals**

Succinct goals for each interview that are highly specific (e.g., reactions to particular product/service ideas) will result in more productive and ultimately more actionable insight than a generalized goal (e.g., attitudes towards a broad concept for a line extension). While true in most research, this is especially relevant when working with executives where we implicitly or explicitly promise to use their time wisely.

- **Flexibility & personalizing the interview**

While conducting 75 or more executive interviews may feel like a quantitative exercise (and, in some ways, it is), the success of these interviews lies in the ability of the interviewer to adapt the interview for each business situation.

- **Distinguishing between useful & not useful input**

There are many instances when the interviewee may unintentionally confuse the interviewer by steering the discussion away from its intended goal. So, equally important to being flexible is the ability of the interviewer to distinguish useful (goal-specific) input from off-target commentary.

- **Listening – exploring what is said & not said**

Listening skills involve more than just keeping quiet and letting the corporate executive talk. It is more about [“active listening.”](#) [Carl Rogers](#) said that, [“To be effective, active listening must be firmly grounded in the basic attitudes of the user.”](#) Through contemplative listening and watching as well as appropriate probing, the executive interviewer should be able to walk away from the interview with the ability to articulate a complete, nuanced understanding of the executive’s point of view.

- **Limited researcher involvement**

The successful implementation of the first five parameters hinges greatly on limited researcher involvement. Ideally, just one senior researcher should execute the initial contact, the scheduling and goal-setting as well as the interviews and analyses.

Face-to-face executive interviewing may not be fashionable or fast but it is an elegant research design that effectively minimizes error while maximizing ultimate insight. It is now and forever the key to the executive suite.

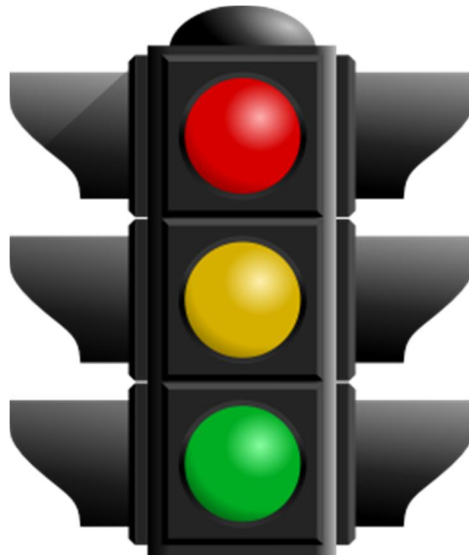
*\* This is an excerpt from M. Roller’s article, [“Meeting Executives Face-to-face.”](#)*

# Visual Cues & Bias in Qualitative Research

April 17, 2011

The Darshan Mehta ([iResearch](#)) and [Lynda Maddox](#) article "Focus Groups: Traditional vs. Online" in the March issue of [Survey Magazine](#) reminded me of the "visual biases" moderators, clients, and participants bring to the face-to-face research discussion. While there are downsides to opting for Internet-based qualitative research, the ability to actually control for potential error stemming from visual cues — ranging from demographic characteristics (e.g., age, race, ethnicity, gender) to clothing and facial expressions — is a clear advantage to the online environment. Anyone who has conducted, viewed, or participated in a face-to-face focus group can tell you that judgments are easily made

An understanding or at least an appreciation for this inherent bias in our person qualitative designs is important to the quality of the interviewing and subsequent analysis as well as the research environment itself. How does the interviewer change his/her type and format of questioning from one interviewee to another based on nothing more than the differences or contrasts between the two of them? How do the visual aspects of participation among the other members of the group? How do group discussants and interviewees respond and comment differently depending on their vision of the moderator, other participants, and the research environment?



without a word being spoken.

least an appreciation for this person qualitative designs is the interviewing and subsequent research environment

The potential negative effect from the unwitting bias moderators/interviewers absorb in the research experience has been addressed to some degree. Mel Prince (along with others) has discussed the idea of "moderator teams" as well as the "serial moderating technique." And [Sean Jordan](#) states that "moderator bias" simply needs to be "controlled for by careful behavior."

There is clearly much more effort that needs to be made on this issue. Creating teams of interviewers may mitigate but may also exasperate the bias effect (e.g., How do we sort out the confounding impact of multiple prejudices from the team?), and instilling "careful behavior" can actually result in an unproductive research session (e.g., Does the controlled, unemotional, sterile behavior of the moderator/interviewer elicit unemotional, sterile, unreal responses from research participants?).

How we conduct and interpret our qualitative research — whether we (consciously or unconsciously) choose to impose barriers to our questioning and analysis, proceed with caution through the intersection of not knowing and insight, or go full steam ahead — rests in great measure with our ability to confront the potential prejudice in the researcher, the client, and our research participants.

# Can You Hear Me Now? Listening in Qualitative Research

April 30, 2011

Somewhere back in school [Carl Rogers's \*On Becoming a Person\*](#) was required reading. Maybe because of the title and my life-long goal to become "a person" or maybe because there is something endearing about Carl Rogers himself, whatever the reason this is one of the few books I have held on to for these many years. The binding of my 1961 paperback edition has fallen apart and only a rubber band keeps the pages bound in some sense of order.



Anyone familiar with Rogers knows that he is considered the father of client-centered therapy. Rogers took a different approach to therapy from his colleagues of the day, one that was open, flexible, and empowered the client to determine his/her own therapeutic course. This was a fairly radical approach at the time and even now there are those who dispute Rogers's techniques. Admittedly a client-centered session can be difficult to watch, as his [interview in 1965 with Gloria](#) illustrates.

The Rogers-Gloria interview is an example of Rogers's method of using long silences pierced by a few quiet words of encouragement, highlighting a key component to client-centered therapy: listening. Rogers believed that a true understanding of an individual, and the ability to form a meaningful client-therapist relationship, is fostered when we use listening to "see the expressed idea and attitude from the other person's point of view, to sense how it feels to him, to achieve his frame of reference in regard to the thing he is talking about."

I have been thinking about Rogers the past couple of weeks while working with groups of social scientists. It began with two face-to-face group discussions followed the next week by two online group discussions ("bulletin boards"). What struck me was the obvious difference in input from the two modes. In the traditional focus group format, both groups of sociologists, psychologists, anthropologists, and the like were orderly and polite and contributed important information. Yet there was a noticeable reluctance to disagree or even argue the issues in this closed-room, eyeball-to-eyeball conversation. In sharp contrast, the bulletin board discussions were vibrant and engaged and filled with plenty of friendly disagreements that added to an already rich volume of insights on the issues.

I think the difference I experienced in these two modes has as much to do with listening as anything else. The social scientists in the traditional focus groups had just as much knowledge and insights to share as their counterparts in the bulletin boards, but was anyone listening? Did the focus group participants sitting around the conference table believe that anyone was truly listening to what they had to say (or wanted to say)? Did anyone else really care about what was on their minds? Those who were clearly stifling comments may have asked themselves these same questions and decided the answer was "no."

The bulletin boards, however, appeared to free social scientists from the confines of eyeball scrutiny and unleashed them to speak openly and in a fully articulated manner. As I read their very long responses to my (and others's) questions I sensed their exuberance in the idea that someone was

actually listening to what they had to say. Each one had their own personal platform from which to sermon, pontificate, or just express a point of view. And we were all listening.

Rogers states that, "a listening, empathic approach leads to improved communication, to greater acceptance of others and by others, and to attitudes which are more positive and more problem-solving in nature." Maybe those long dreaded silences are not so bad after all, and maybe it is just what we need more of in our face-to-face group discussions.



# Can We Reduce Gender Differences in Qualitative Research?

May 31, 2011

[Rebekah Young](#) is a PhD candidate at Pennsylvania State University. As part of her dissertation she is looking at “don’t know” (DK) survey responses, specifically how the incidence of DK responses varies by demographic segments. Looking across 12 nationally-representative datasets, 354 questions, and responses from more than 23,000 respondents, Rebekah determined that, among other things, men were less likely to give a DK response than women.

While Rebekah’s findings are not news (i.e., they are supported by existing literature), her work left



me wondering about gender differences in qualitative research. Specifically, whether there is a propensity in men to voice informed answers to a moderator’s questions even when the simpler, more appropriate response should be, “I don’t know.” Likewise, I wonder how often women cave with a DK rejoinder when they actually harbor knowledge or experience that could further insights from the research.

This gets more interesting when you consider the research subject matter because the likelihood of non-response in our qualitative research may depend on the topic of discussion. Men, it turns out, are more likely to voice “don’t know” around “sensitive questions” (e.g., sexual activity) while women are less likely to give a DK response when the discussion topic is “family and friends.” At least in the survey research Rebekah looked at. But do these types of gender differences exist in the qualitative arena as well?

I have plenty of colleagues who argue that mixed-gender focus group discussions never “work” because of the competing dynamics generated from the pure nature of psychological, emotional, and physical male-female differences. Yet I have rarely hesitated to combine men and women in a multi-person qualitative session. This makes my work more difficult – teasing out what someone *really* thinks, stripped of all possible gender-related sources of error – but it also makes it more real. It is more real because, after all, men and women do live together in some context in the real world, and the gender dynamic is often an important sight to behold, lending a new dimension to our understanding of the research.

Home improvement, do-it-yourself research is a case in point. Many years ago this was primarily a man’s world but women quickly entered this market and, in my experience, have as much if not more to say about selection, purchase, and use of building materials than men. These focus groups are typically very vocal and full of energy, with everyone (both men and women) sparked by their mutual interest in the topic (home improvement). Are men more likely to contribute (less likely to say “don’t know”) in this traditionally-male topic of discussion while drowning out their female counterparts? No, not if I have anything to say about it.

So maybe the research findings on DK responses are confined to survey research. Maybe the ability to reduce gender-response differences in the qualitative environment is a challenging but real benefit to our qualitative work.

# Selection Bias & Mobile Qualitative Research

July 31, 2011

When I conduct a face-to-face qualitative study ó whether it is a group discussion, in-depth interview, or in-situ ethnography ó I am taking in much more than the behavior and attitudes of the research participants. Like most researchers, my scope goes way beyond the most vocal response to my questions or the behavior of store shoppers, but incorporates much more detail including the nuanced comments, the facial and body gestures, as well as the surrounding environment that may



be impacting his or her thoughts or movements. So, while one of my face-to-face participants may tell me that he òjust prefersö shopping at a competitor's store for his hardware, I know from the entirety of clues throughout the interview that there is more to uncover which ultimately lands me on the real reason he avoids my client's store ó the unavailability of store credit. Likewise, the mobile research participant shopping at Walmart for coffeemakers may share her shopping experience via video and/or text but unintentionally omit certain components ó e.g., the impact of competitive displays, product packaging, store lighting, surrounding

shoppers ó that would have been discovered in an in-person ethnography and contribute important insights.

Selection bias is inherent in nearly all research designs. At some level research participants are deciding what is important to communicate to the researcher and what is worthy of being ignored. From deciding whether to participate in a study, to the granularity of details they are willing to share, the participant ó not the researcher ó controls some measure of the research input. It is no wonder that many of the discussions concerning research design center on this issue, with survey researchers discussing at length the best method for sampling and selecting respondents (e.g., the next-birthday method in telephone studies), converting initial refusals, and effective probing techniques.

There is not much discussion on selection bias in qualitative research. One exception is an article by David Collier and James Mahoney\* that addresses how selection bias undermines the validity of qualitative research. More focus on the issue of selection bias in qualitative research is warranted, particularly given the speed with which research designs today are evolving to keep up with new communication technology.

Mobile research is just one example of an increasingly popular qualitative research method. Mobile research provides for the first time a viable way to reach consumers in their own environment and to gain a real-time view of their world. At long last we have direct access to something that in the past has been elusive ó reality, the connection between what people think, what they say, and what they actually do. Mobile qualitative research is fueled by the notion that capturing people òin the momentö and allowing participants to drive what is or is not shared with the researcher results in a more real (i.e., accurate) accounting of some microcosm of a person's life. So, is it any wonder that mobile qualitative research was hailed as òmore accurateö (compared to traditional modes) at the recent [Market Research in a Mobile World 2011 conference in Atlanta](#) (Kristin Schwitzer and Dana Slaughter's, [òUsing Mobile Qualitatively to Transform Insight Generationö](#)), and òcloser to the truthö in [Qualvu's](#) recent Webinar ([òMobile Research Gets Realö](#))?

And that brings me back to selection bias. While the participant-driven model of mobile qualitative research may provide one perspective of human nature at a given point in time, we have to wonder how much of the whole story we are really getting. As long as participants control the portal by which we judge their attitudes and behavior, we run the real risk of introducing selection error into our research designs. Sound qualitative research, like any other research method, is built on a framework of design principles that ensure the integrity of our findings. I look forward to future discussions of error-prone weaknesses in mobile and other qualitative research designs.

\* Collier, David and James Mahoney, "Insights and Pitfalls: Selection Bias in Qualitative Research," *World Politics* 49 (October 1996), 56-91.