

# Qualitative Research Design:

## Selected Articles from *Research Design Review* Published in 2014

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*Research Design Review – [www.researchdesignreview.com](http://www.researchdesignreview.com)– is a blog first published in November 2009. RDR currently includes over 110 articles concerning quantitative and qualitative research design issues. This paper presents a selection of 13 articles that were published in 2014 devoted to qualitative research design. To some extent, all of these articles revolve around the idea that adopting quality standards in qualitative research design is critical to the credibility, analyzability, transparency, and usefulness of the outcomes; with the first article making the case that quality issues transcend the paradigm debates. Because analysis is often deemed the most difficult part of a qualitative study, a number of the articles in this collection pertain to “finding meaning,” data verification, and inference, along with discussions on reflexivity as an important contributor to the analytical process. These articles also touch on newer channels and modes in qualitative research, such as social media and mobile, as well as the evolving stature of qualitative research in areas such as psychology and political science.*

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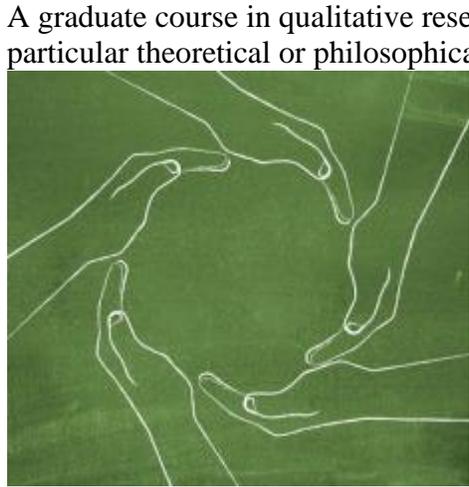
**January 2015**

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# The Transcendence of Quality Over Paradigms in Qualitative Research

February 26, 2014



A graduate course in qualitative research methods may be framed around discussions of the particular theoretical or philosophical paradigms – belief systems or world view – that qualitative researchers use in varying degrees to orient their approach for any given study. And, indeed, if the instructor is using popular texts such as those from [Norman Denzin](#) and [Yvonna Lincoln](#) (2011) or [John Creswell](#) (2013), among many others, students would be learning first about the different implications and approaches associated with various paradigm orientations, followed by (or along with) the corresponding methodological considerations.

There have been over the years debates in the academic qualitative research community about how best to identify and talk about these paradigms as well as quality concerns related to conducting research based around any one of these belief systems. In the broadest sense, the most oft-discussed paradigms in qualitative research are: postpositivism – often allied with a more quantitative approach where the emphasis is on maintaining objectivity and controlling variables in order to approximate “reality”; constructivism or interpretivism – in which the belief is not hinged to one objective reality but multiple realities that are socially constructed based on subjective meanings; and critical theory – where the focus is on bringing about social change for the marginalized or oppressed (e.g., issues related to racism, classism, or sexism) by way of a localized, fully collaborative approach.

It is these underlying paradigm orientations that fuel further discussions concerning what it means to conduct a “quality” qualitative study. [Clara Hill’s “consensual qualitative research”](#) – that is grounded somewhere between postpositivism and constructivism, and prescribes a highly-specific method – is just one example.

It is not at all clear, however, that the researcher needs a paradigm-bound research design where one set of criteria pertains to one orientation but not to another. As important as a theoretical or philosophical orientation may be to serving as the foundation to a qualitative research effort, it need not be tied to the quality measures the researcher utilizes in the actual *doing* of the research. In fact, the quality aspects of a research design should transcend, or at least be a separate discussion from, the consideration of paradigms. Regardless of the philosophical thinking that supports the approach, all qualitative research necessitates an implementation that maximizes the study’s credibility, analyzability, transparency, and ultimate usefulness to the research team, the end users, as well as the research community as a whole. This type of quality framework is discussed more fully [here](#).

As discussed many times in this blog and elsewhere, qualitative research is complex and deserving of a varied and complex debate on any number of aspects. This complexity, however, unites us in our commitment to building quality components into our research designs so that all of us – no matter our theoretical/philosophical understanding of what it means to engage qualitative research – can realize our objectives.

Creswell, J. W. (2013). *Qualitative inquiry & research design* (3rd ed.). Thousand Oaks, CA: Sage Publications.

Denzin, N. K., & Lincoln, Y. S. (Eds.). (2011). *The Sage handbook of qualitative research*. Thousand Oaks, CA: Sage Publications.

[Image captured from <http://appalachianson.wordpress.com/2013/09/16/join-hands-unite-the-riot/> on 26 February 2014.]

# Finding Meaning: 4 Reasons Why Qualitative Researchers Miss Meaning

March 17, 2014



Research of any kind that is interested in the human subject is interested in finding meaning. It is typically not enough to know that a behavior has occurred without knowing the significance of that behavior for the individual. Even survey research, with its reliance on mostly preconceived closed-ended questions, is designed with some hope that sense (i.e., meaning) can be derived by cross tabbing data from one question with another, factor analyzing, t-testing, z-testing, regressing, correlating, and any number of statistical techniques.

Yet, it is qualitative research that is usually in charge of finding meaning. It is not good enough to know who does what, for how long, or in what manner. Qualitative researchers are not so much interested in what an online participant tacked to a Pinterest board, or which treatment option a cancer patient chooses to discuss in an in-depth interview, or how much focus group participants might be willing to spend for tickets to a sold out Mets game, or the observed reactions of 4<sup>th</sup> graders as they are bullied in recess. All of this serve as a backdrop to what is most important – which is, what does it all mean for the people we study? And, because life is complicated, what are the multiple meanings? Without an effort to get at that, then why bother with qualitative research in the first place.

There are many factors that conspire to keep qualitative researchers from finding meaning. Here is just four:

1. **Researchers rely too heavily on self-reports.** This is another way of saying that researchers are not conducting *research* so much as they are *reporting* what they see or hear from participants. As reporters, the outcome of their research may be factual yet fail to produce the meaning – the *thinking* – that supports and makes useful the research effort. Unless the researcher has diligently followed up participants' input with individualized inquiry and sought to find meaning, the researcher must concede that the value of the research is lost.
2. **Researchers fail to consider the response medium.** If a mobile research participant elects to send a video of the in-the-moment dining scene at McDonald's, how is the meaning associated with that video the same or different than the meaning of a photograph or a text message? Is the participant actually conveying separate thoughts and meanings by the media chosen, or not? How do the media – the type and format – of the response convey different intended meanings? What is the researcher to assume when one participant responds with all visual images and another with only text? What does that say about each participant *and* what does that say about the variations (or sameness) in the meanings they associate with their responses.
3. **Researchers do not take into account the ways they bias the data.** When is the last time you read a qualitative research report that included the researcher's reflexive journal, or at

least commentary from the researcher concerning how he or she may have impacted research outcomes? There are numerous ways the researcher may affect the data: weak interviewing/observation skills; unwittingly imposing personal values or beliefs; not recognizing participant bias, such as socially desirable responses; or simply being mismatched with the participants in terms of, for example, age and race. These and other causes of researcher effects mask participants' meanings and hence the usefulness of the research.

4. **Researchers are unwilling or unable to spend sufficient time with any one participant.** Unless the researcher has built in the requisite time needed with each participant to honestly hear and become knowledgeable about the person and the meanings of their experiences, then what is the point? Why not conduct survey research and go back trying to read behind the numbers if qualitative researchers are not committed to the unwavering reality that qualitative research takes time. Because, if qualitative researchers have any hope of finding meaning, they must commit the time with their participants that give meaning a chance to emerge.

[Image captured from <http://www.ysc.com/our-thinking/article/finding-meaning-in-networks> on 16 March 2014.]

# Reflections from the Field: Questions to Stimulate Reflexivity Among Qualitative Researchers

March 30, 2014

In November 2012, Research Design Review posted an article titled, “[Interviewer Bias & Reflexivity in Qualitative Research](#).” This article talks about why self-reflection is an important and necessary step for qualitative researchers to take in order to address “the distortions or



preconceptions researchers’ unwittingly introduce in their qualitative designs.” Although the article focuses on the need for reflection as it relates to the potential for bias in the in-depth interview (IDI) method, the relatively<sup>1</sup> intimate, social component of qualitative research generally and other methods specifically – focus groups, ethnography, narrative – make them equally susceptible to researcher biases and suppositions.

The outcomes from a qualitative study are only as good as the data the researcher returns from the field. And one of the biggest threats to the quality of the research data is the ever-present yet rarely examined assumptions and prejudices inadvertently contributed by the researcher.

This is why personal reflection is an important part of qualitative research design. To motivate and capture this reflection, the earlier RDR article discusses the use of a reflexive journal or diary by which the researcher provides a subjective account of each research event with details of the influences that may have affected results. The journal “sensitizes the [researcher] to his or her prejudices and subjectivities, while more fully informing the researcher on the impact of these influences on the credibility of the research outcomes.”

But what exactly are the particular questions the researcher should be addressing in this journal? That is, what exactly is the researcher reflecting *on*? A reflexive exercise that is totally open and non-directional can be good, but it is also useful to consider particular questions that help stimulate reflective thoughts. Here are a few key questions for the researcher’s reflexive journal:

## **Broad Takeaways from the Research Event (e.g., the IDI, the focus group, the observation)**

- What do I think I “know” from this/these participants?
- How do I think I “know” it?
- Will this knowledge change the course of the research, in terms of objectives, methods, line of inquiry; and, if so, how?

## **Specific Reflections on the Experience**

- Assumptions
  - What assumptions did I make about the participant(s)?
  - What assumptions did I make about comments/responses to my questions?

- How did these assumptions affect or shape: the questions I asked, the interjections I made, my listening skills, and/or my behavior?
- Values, beliefs, life story, social/economic status
  - How did my personal values, beliefs, life story, and/or social/economic status affect or shape: the questions I asked, the interjections I made, my listening skills, and/or my behavior?
- Emotional connection with the participant(s)
  - To what degree did my emotions or feelings for the participant(s) affect or shape: the questions I asked, the interjections I made, my listening skills, and/or my behavior?
  - How will my emotions or feelings for the participant(s) affect the analytical process and my ability to draw valid interpretations from the data?
- Physical environment & logistics
  - How did the physical setting/location of the research event alter how I related to the participant(s), and how the participant(s) related to me?
  - How did the physical setting/location impact data collection?
  - What were the logistical issues (e.g., in gaining access) that contributed to the “success” or weakness of the outcomes?

<sup>1</sup>Compared to quantitative research.

Image captured from: [http://photography.nationalgeographic.com/photography/photos/patterns-nature-reflections/#/sandhill-cranes-sartore\\_1516\\_600x450.jpg](http://photography.nationalgeographic.com/photography/photos/patterns-nature-reflections/#/sandhill-cranes-sartore_1516_600x450.jpg)

# Verification: Looking Beyond the Data in Qualitative Data Analysis

April 30, 2014

It is a common misperception among researchers that the analysis of research data is a process that is confined to the data itself. This is probably truer among qualitative researchers than survey



researchers given that the latter frequently publish their work in the literature comparing and contrasting their data with relevant earlier studies. Qualitative research, on the other hand, is typically held up to less scrutiny; and, except for the usual comparisons of populations segments, it is rare to find an analytical discussion that goes beyond the patterns and themes derived from the qualitative data itself. This may be

for any number of reasons. It may be associated with the idea that qualitative research by definition is chock full of uncontrollable variables that vary from study to study making data comparisons across studies unreliable, or it may be researchers' unfamiliarity with the concept of data verification in qualitative research, or it may be a function of limited resources (i.e., time and research budget), or qualitative researchers may simply be unwilling to expend the extra effort to broaden their analyses.

Yet looking outside the data we gather in in-depth interviews, group discussions, or observations is important to the integrity of our qualitative research designs. The consideration of alternative sources of information serves to verify the study data while giving the researcher a different, more enriched perspective on study outcomes. It is not important whether this additional input supports the researcher's conclusions from the primary data; and, indeed, contradictions in the verification process do not necessarily invalidate the study's findings. What *is* important, however, is that the researcher recognizes how other points of view can contribute to a more balanced as well as more robust and meaningful analysis rather than relying on study data alone.

There are many proposed approaches to the verification of qualitative research data. Three of the most useful are:

- **Triangulation:** The use of multiple sources to contrast and compare study data to establish supporting and/or contradictory information. A few common forms of triangulation are those that compare study data with data obtained from other sources (e.g., comparing the IDI transcripts from interviews with environmental activists with those from conservationists), a different method (e.g., comparing results from an IDI study to focus group results on the same subject matter), and another researcher (e.g., using multiple researchers in the analysis phase to compare interpretations of the data).
- **Negative-case (or “deviant”) analysis:** The researcher actively seeks instances in the study data that contradict or otherwise conflict with the prevailing evidence in the data, i.e., looks for outliers. This analysis compels the researcher to develop an understanding about *why* outliers exist, leading to a greater comprehension as to the strengths and limits of the research data.
- **Reflexive journal:** A diary kept by the researcher to provide personal thoughts and insights on what happened during the study. It is an invaluable resource that the researcher can use to review and judge the quality of data collection as well as the soundness of the researcher's

interpretations during the analysis phase. This blog has discussed reflexive journals in many posts, including the most recent article [“Reflections from the Field: Questions to Stimulate Reflexivity Among Qualitative Researchers.”](#)

Image captured from: <http://executivecoachdaveschoenbeck.com/2013/03/11/11-tips-to-help-you-get-promoted/>

# Resisting Stereotypes in Qualitative Research

May 23, 2014

One of the most meaningful concepts in qualitative research is that of “Othering”; that is, the concept of “us” versus “them” that presents itself (knowingly or not) in the researcher-participant interaction. Othering is an important idea across all qualitative methods but it is in the in-depth



interview – where the intensity of the interviewer-interviewee relationship is pivotal to the quality of outcomes – where the notion of Othering takes on particular relevance. As discussed [elsewhere](#) in *Research Design Review*, the interviewer-interviewee relationship in IDI research fosters an “asymmetrical power” environment, one in which the researcher (the interviewer) is in a position to make certain assumptions – and possibly misperceptions – about the interviewee that ultimately play a role in the final interpretations and reporting of the data. It is this potentially uneven power relationship that is central to the reflexive journal (which is discussed repeatedly in this blog).

In 2002, *Qualitative Social Work* published an article by [Michal Krumer-Nevo](#) titled, “The Arena of Othering: A Life-Story with Women Living in Poverty and Social Marginality.”<sup>1</sup> This is a very well-written and thought-provoking article in which Krumer-Nevo discusses the “sphere of power relationships” in IDI research, an environment in which the interviewer and interviewee are continuously swapping their power status – “One minute I was the ‘important’ interviewer, with power and status...and the next minute I would find myself facing a closed door” (p. 307). In this way, the Other (or “us”) in Othering moves back and forth, with both interviewer and interviewee attempting to socially define and/or control the other.

From the perspective of the interviewer, it takes more than keen listening skills (something discussed many times in this blog, esp., in [October 2013](#) and [April 2011](#)) to delve beyond unwarranted assumptions concerning the interviewee, it also takes a keen sense of one’s own stereotypical “baggage.” In her IDI research with women “living in poverty,” Krumer-Nevo found herself in a stereotypical trap by way of “seeing [the interviewee] as a victim” rather than seeing the strengths and contributions made by the impoverished participant. By succumbing to the notion of victim, Krumer-Nevo was defining this interviewee in a flat, one-dimensional, stereotypical way instead perceiving the complex, multi-dimensional character she was.

Krumer-Nevo is right when she talks about the need to resist Othering in IDI research and, particularly, the tendency to define our research participants by our own socio-economic or theoretical framework which blinds us to the reality of the very subject matter we want to know more about. Shedding our stereotypes means putting “aside the normative knowledge acquired from one’s membership in a society, a family, an educational system of values [because] the values, positions, and attitudes acquired in the process of socialization...work against the ability to understand those who live in poverty [or in situations unfamiliar to us]” (p. 316).

Resisting stereotypical beliefs – resisting being the Other to the other – is one critical step all researchers can take in their IDI research towards achieving quality data outcomes and credible, useful interpretations of the findings.

<sup>1</sup>Krumer-Nevo, M. (2002). The arena of othering: A life-story study with women living in poverty and social marginality. *Qualitative Social Work*, 1(3), 303–318.

Image captured from: <http://glamdollteaston.wordpress.com/2013/07/02/what-are-the-dangers-of-stereotyping-people/>

# The Elevation of Qualitative Research Design: The Dawning of a New Day

May 31, 2014

Qualitative and quantitative research methods have always, in some shape or form, sat side-by-side in research design. It is difficult to find any serious quantitative study, for instance, that didn't set out with a preliminary qualitative phase to help steer its course, with survey researchers quick to



quip, 'Oh yes, we conducted a few groups before designing the questionnaire'. And yet, it is typically the *quantitative* research phase that gains the spotlight in mixed-method designs, where the survey process and resulting data play starring roles, while the qualitative research component acts in a supporting albeit lesser and infrequently scrutinized role in the overall design.

This tale of submission is being turned on its head as a quiet revolution stirs to more boldly integrate and elevate qualitative methods in the research scheme. Nowhere is this movement – or dare we say, equalization next to quantitative – more apparent than in two separate but equally-momentous events in the last few months. The first of these pertains to the long-fought and ground-breaking recognition of qualitative methods in psychology; specifically, from the [American Psychological Association](#). As a discipline long entrenched in experimental research, it is only the unrelenting efforts of psychologists impassioned by the qualitative approach that has given voice to qualitative research in the APA. The fact that members of APA's Division 5 recently voted to change the division name from "Evaluation, Measurement, and Statistics" to "Quantitative and Qualitative Methods," *as well as* the publication of APA's first-ever journal devoted to qualitative research – [Qualitative Psychology](#) – in February 2014, signal a new understanding of the prominence qualitative methods play in psychological research.

The other momentous event occurred earlier this month at the [AAPOR](#) conference in Anaheim. In his presidential address, [Rob Santos](#) – chief methodologist at the Urban Institute and vice president of the American Statistical Association – surprised his mostly survey-minded AAPOR audience with an eloquent and enthusiastic cry for qualitative research. Rob encouraged attendees to look beyond survey research for their insights and embrace all that qualitative methods can offer. To our astonishment, Rob stated that 'I have tasted the fruit of qualitative research and it is sweet'.

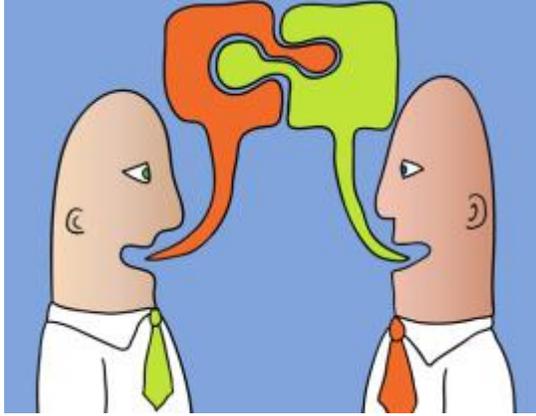
This is only the beginning. If psychologists and political scientists can embrace qualitative research with the scientific enthusiasm traditionally reserved for quantitative, then the future is bright for researchers across all disciplines who believe in bringing parity to how we think about research design regardless of method. This ushers in a new environment in which researchers not only scrutinize and fine-tune their survey designs but with equal enthusiasm debate how to maximize the quality in their qualitative research. A new day is dawning and "it is sweet."

Image captured from: <http://christtribe.com/a-new-day-is-dawning/>

# Turning Social Media Monitoring into Research: Don't Be Afraid to Engage

June 26, 2014

The idea of conducting qualitative “research” by way of simply listening in on conversations posted on various social media venues is, from a research design perspective, curious. It is curious because



the business of understanding [how people think](#) (i.e., the business of marketing and social research) has never been about just hearing them talk, reading their words, and/or observing their behavior. While capturing this information may prove interesting and in some circumstances useful (e.g., counting the number of mentions of a competitive brand or variations in reactions to a new product introduction), it is not good enough when the intent is to learn about underlying perceptions and motivations.

This issue is discussed throughout *Research Design Review* but most notably in a [September 2011 post](#) where the distinction is made between social media *monitoring* and social media *research*. Specifically, this article states that “the reason monitoring or ‘listening in’ on the conversations that whirl within the Web is not research – at least not *primary* research – is because it lacks meaning,” adding that

“There is no meaning in customers’ comments on Facebook (or Twitter or review sites) beyond the idea that customers are really angry about one thing, happy about another thing, or just obsessive about something else... It is not good enough to listen unless we know what we are hearing [using] research principles [that] raise the bar and require the researcher to design an approach that reaps true meaning.”

It has been nearly three years since that 2011 post and little has changed. In fact, the increased use of mobile devices in the research community has actually deepened researchers’ enthusiasm for social media monitoring. An article in the MRA’s most recent issue of *Alert!* magazine (which, as of today’s date, is not yet available online) is just one reminder of researchers’ continued excitement over “social media listening” and the “ability to observe spontaneous conversations in a natural environment where people feel comfortable expressing themselves.” And several of the qualitative researchers interviewed for that article emphasized that it is solely *listening* without the intrusion of *questions* “where the greatest and deepest insights come.” Indeed, only two of the nine researchers interviewed stated that they actually interact with the people they monitor online.

Although pure listening and observation has what some think of as the positive effect of not disturbing “the fishbowl” of the social media venue, it can be crippling in terms of gaining an honest understanding of what is really going on. It is only when researchers are willing to give up the undisturbed environment and do what researchers do – ask questions – that meaning is allowed to blossom.

As Reg Baker said in a [June 24, 2014 post](#) pertaining to the Insight Innovation Exchange conference recently held in Atlanta, “clients will always listen to [suppliers who talk about] faster and cheaper

[research designs].” But until researchers show their clients that, in addition to using the latest technology and gadgets, they have also utilized honest research design techniques that deliver quality, credible outcomes – that truly account for the contextual space in which people think – the justification for absolute unobtrusive measures such as those from social media monitoring is debatable.

Only when researchers develop social media research designs that incorporate follow-up conversations with their “participants” will they begin to bring substantive context – meaning – to their online observations.

Use your researcher skills. Engage. Ask questions. It may seem intrusive, time-consuming, expensive, and intellectually challenging, but just do it.

Image captured from: <http://www.howtoee.com/good-conversation-is-a-two-way-deal/>

# If I Conduct a Large Qualitative Study with 100 Participants, is it Quantitative Research? Three Big Reasons Why the Answer is “No!”

July 10, 2014

Too often qualitative researchers present their findings with an assertion along the lines of, ‘We conducted 25 focus groups with a total of 250 participants making this study more quantitative than qualitative’; or ‘We conducted 10 online bulletin boards with 15 participants in each divided between males and females, so we wound up with good quantitative data’; or ‘We planned on



conducting 30 qualitative in-depth interviews (IDIs) but extended the research to include 100 interviews so that we can quantify the results.’ Unfortunately, comments like these reflect a misguided attempt to equate apples with oranges – lumping them both into the category of “fruit” although their essence – the properties that characterize them – are radically different.

Conducting a lot of qualitative research does not transform it into a quantitative study. To say otherwise, assumes that the only distinguishing factor between a qualitative and quantitative research design is the number of participants or respondents who contribute to the research outcomes. This way of thinking would deem a study conducted with less than 30 individuals as qualitative while something more than that – and certainly more than 100 – as quantitative. Oh, if the workings of research were so simple. Research, like apples and oranges, may all be “fruit” but the essence of design maintains its individuality.

There are three pretty big reasons why a qualitative study of any size or shape will never – or *should* never – be confused with anything remotely looking like quantitative research.

**Big Reason #1:** By its very nature, qualitative research thrives on the use of unstructured or semi-structured question formats. Unlike survey questions which are highly structured requiring explicit interviewer training so that questions are asked precisely as written, qualitative questioning is typically more relaxed and, though following a topic outline, the researcher will most likely word questions in varying ways as well as introduce new topics as they emerge during the course of the study. It is this flexible nature of qualitative research that allows for the in-depth, rich input that serves to clarify and contextualize quantitative data. Allowing for new content brings us to Big Reason #2...

**Big Reason #2:** The content and therefore the context of a qualitative event (e.g., focus group discussion or IDI) will vary from event to event. This is because research participants invariably introduce new ideas or thoughts that the qualitative researcher explores. The introduction of new, not-previously-discussed content creates a unique context within each qualitative event which *ipso facto* serves to shape participants’ comments in a discussion or interview to some degree. Along with varying content and contexts, there is a host of other factors that act as variables in qualitative research, which brings us to Big Reason #3...

**Big Reason #3:** The aggregation of a whole bunch of qualitative research events can never be interpreted as quantitative data because there are simply too many variables at play within any one event. While quantitative research design incorporates certain measures as an attempt to control for an even playing field in the execution stage, the qualitative environment is replete with variables that counter any effort to create a controlled context. Here are just three of the major variables affecting face-to-face qualitative research:

- Venue – In face-to-face research the venue from one focus group discussion or IDI to another continually changes as the moderator/interviewer moves from one research facility or interviewing site to another. Each site has its own aura – emitting from the size of the room, the lighting, the décor, or hospitality of the facility staff – that can impact participants' comfort level and hence their engagement with the research. Whether or not client viewers are present – as well as the *number* of clients viewing – is another contributing variable to the venue impacting the research experience.
- Moderator/interviewer – Even if the same moderator or interviewer conducts all discussions or IDIs, the researcher's particular mood (affecting what and how questions/issues are raised) or style of dress will modify outcomes in some way.
- Show rate – The dynamics – and therefore research findings – will vary dramatically in group discussions (face-to-face or otherwise) depending on: 1) who decides to show up and 2) how many show up. The group composition (i.e., who shows up) in terms of demographics as well as personality types is a key variable that directly affects results. And clearly a discussion with 10 participants will produce a different dynamic as well as quantity and quality of outcomes compared to a discussion with six individuals.

It is curious why any researcher would need to equate their large qualitative study to a quantitative effort. By its very nature, qualitative research design is not intended to be nor does it aspire to become a newfangled version of quantitative. It is not the mere sample size that separates qualitative from quantitative but rather the multifaceted essence of their designs.

Image captured from: <http://cobornsdelivers.wordpress.com/2010/02/25/apple-and-oranges-don%E2%80%99t-mix/>

# Integrating Quality Features in Qualitative Mobile Research Design

July 29, 2014



Conducting qualitative research by way of a mobile device presents the researcher with unique challenges in terms of how to design a mobile study that results in valid outcomes. There are, however, a number of quality measures that researchers can build into their qualitative mobile studies that will serve to elevate their research designs and bring added confidence to the final results. The following are just a few quality considerations that qualitative researchers should think about and incorporate throughout the mobile research process. This list simply highlights a few design aspects related to mobile research and in no way supersedes the additional quality features (discussed throughout this blog) that should be part of any qualitative research design.

These design aspects are discussed from the perspective of the Total Quality Framework\* which is comprised of four components – Credibility, Analyzability, Transparency, and Usefulness. In essence, the framework is based on the idea that all qualitative research must be credible, analyzable, transparent, and useful. The first three components respectively pertain to the data collection, analysis, and reporting phases of the research.

## Credibility

An important factor in the data collection phase has to do with gaining cooperation from study participants. The greater the cooperation, the more inclusive the research will be of the target population. Although all research should address ways to boost rates of cooperation, qualitative mobile research designs should pay special attention to:

- Location – This refers to the extent to which the researcher can be flexible in the exact location from which the participant provides feedback, e.g., does the participant need to shop at a particular store location or is any location in the retailer chain permissible (while still meeting the study’s overall objectives)? Greater flexibility in where the participant needs to be to complete the research will obviously encourage greater participant cooperation.
- Incentives – Given the more participatory role participants play in mobile research compared to more traditional modes, mobile participants may need a higher level of cash and/or non-cash rewards for their cooperation. These incentives need to be clearly communicated to participants during recruitment, including an explanation of the process for distributing incentives at the completion of the study.
- Gatekeepers – Qualitative mobile research has the potential of being particularly valuable when conducting studies with hard-to-reach or vulnerable segments of the population (e.g., teenage mothers); however, gaining access (and cooperation) can be a challenge. In these cases, the researcher needs to build into the design an efficient means for establishing relationships with informants (e.g., community leaders) and/or gatekeepers who can facilitate the process.

- Rapport – Building rapport with qualitative mobile research participants is important to gaining and maintaining their cooperation. The rapport-building process should begin with recruitment, followed by frequent communication prior to the onset of fieldwork (e.g., to clearly set participants’ expectations), followed by appropriate contact during the field period, and ending with a thorough debrief interview/conversation with the participant at the conclusion.

## Analyzability

The analysis phase of qualitative research design consists of two broad areas: data processing and data verification. The qualitative mobile researcher needs to think about:

- Data processing – A critical step in data analysis is the transformation of participants’ input into a form that can be coded, evaluated for themes/patterns, and interpreted. In mobile research, this may take the form of transcribing text/email messages as well as the audio files of recorded phone interviews. The researcher must also take the added steps of (1) associating this transcribed data with the images and/or videos that accompanied the participant’s input, and then (2) developing a system that organizes all these data units for any one participant with that obtained by all the other participants. Needless to say, this can be a necessary but daunting task.
- Data verification – With the various types of data the researcher may receive from a qualitative mobile study, it becomes particularly important to build verification strategies into the design. Conducting peer reviews or inter-researcher checks as well as scrutinizing outliers (e.g., participant feedback that contradicts a prevailing observation) is especially important to producing valid interpretations of such varying types of data that may be produced from qualitative mobile research.

## Transparency

The reporting function in qualitative — esp., *marketing* – research has increasingly devolved over the years to the point where even fragmented thoughts separated by bullets on a PowerPoint slide are being abandoned for mostly image-only reporting formats. But, as argued in [an earlier post](#), complete transparency in the form of reporting research design is essential because it allows the user of the research to judge the quality of the research conducted as well as enable “the reader of your research the opportunity to apply the research design used in one context to another analogous context.” The need to provide a “thick” (i.e., complete, full) description of the research design in the final document is critical in mobile studies where a host of variables may have impacted the final outcomes. So, for instance, the report should include not only the dates on which the fieldwork was conducted but also the particular days and the time of day when each participant provided feedback. This may seem tedious but could be important if, for example, some participants completed their shopping assignments during a busy holiday period – when store traffic and sales assistance altered the shopping experience – and others did not.

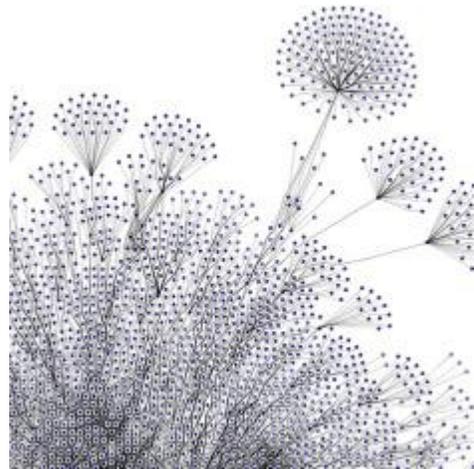
\* A complete discussion of the Total Quality Framework is presented in the forthcoming book from Guilford Press, *Applied Qualitative Research Design: A Total Quality Framework Approach* (Roller & Lavrakas, 2015).

Image captured from: [http://www.maximumpc.com/tags/wifi\\_alliance](http://www.maximumpc.com/tags/wifi_alliance)

# Observational Research Nurtures a Growing Interest in Contexts

September 30, 2014

With a lot of discussion about new methods of observation among qualitative researchers – in-the-moment mobile research and the like – it is terrific to witness an increasing appreciation of broader contexts. This perspective embraces the idea that individual behavior and thought are not so easily and singularly confined to any one moment in time. One could argue that it is *because* of this new-found obsession with observation that many researchers have come to discover – as if for the first time – the essential role that context plays in our qualitative studies. In this way, observational research – a method often bypassed for focus groups and other qualitative methods in the past – has led the research community into what is becoming a growing and healthy dialogue concerning the contextual nature of being human. Here are just four contributors to the dialogue that have recently come my attention:



An interview with [Christian Madsbjerg at ReD Associates](#) appears in the September issue of *Marketing News* – [“What it Means to be Human”](#) by Elisabeth A. Sullivan. In it, Madsbjerg asserts that “people are different from the way that we research them,” emphasizing the point that “the respondent is not a person” but rather “an ecology of people, a culture of people” that includes friends, family, work life, and other facets of who they are. So, while he is a strong supporter of observing people’s lives, Madsbjerg is equally interested in the totality of the “phenomenon” – the various contextual components – under study. This might lead, for example, to a technique he calls “breaching” whereby research participants agree to do without their smartphones so that researchers can look at how smartphone users adapt their everyday lives sans smartphone, which allows researchers to learn more deeply about the “hidden familiarity” of the smartphone-use cultural phenomenon.

If you are an ESOMAR member, you are probably familiar with the association’s custom of granting a free download of a conference paper to members on their birthday. It was recently mine and I took the opportunity to download the 2012 paper, [“Research in a World Without Questions”](#) by [Tom Ewing](#) (BrainJuicer®) and [Bob Pankauskas](#) (Allstate Insurance). As the title suggests, the authors stress the importance of research methods that focus on what people *do* rather than “what they say they do”; however, the title is a bit misleading in that they are not really advocating for “a world without questions” but instead a world without *direct* questions to research participants (e.g., opting instead for psychoanalytic or projective techniques). Like Madsbjerg, Ewing and Pankauskas are interested in investigating the “hidden triggers” that lurk behind the purchase decision-making process, including the “interventions that change the context of the decisions.” The authors go further to discuss how to investigate “near context” (e.g., in-the-moment environment) and “far context” (e.g., cultural and social influences) in ways that enable researchers to “get into your customer’s world” without direct questioning.

[Dawnel Volzke](#) recently wrote a thoughtful article discussing [sensory ethnography](#) referencing Sarah Pink's book [Doing Sensory Ethnography](#). Volzke uses her own work as a nurse to talk about the importance of techniques in the patient-nurse environment that go beyond observation and direct questions to amplify the patient's contextual meaning. Taking from Pink, Volzke states that "capturing and presenting sensory information in the most truthful and complete manner will aid in understanding of individuals, situations, and cultures." She touches on important concepts discussed throughout *Research Design Review*, particularly interviewer bias and the idea of reflexivity –

*"I find that I am much more able to 'do sensory ethnography' when I slow down and take the time to properly assess people and situations. My bias and assumptions need to be set aside, and I must seek to truly sense the truth about the object that I am studying. My view must be both broad and detailed, and my account to others must embody the truest picture possible."*

And finally, a recent blog post from [Jeffrey Henning](#) – "[From Market Researcher to Customer Experience Leader](#)" – reports on a case study presented at this month's [Corporate Research Conference](#) in Chicago by [Neal Kreitman](#) of OneMain Financial. Henning talks about how Kreitman went beyond satisfaction research data to gain insightful knowledge of the "optimal customer experience" by immersing the organization in qualitative research, including focus groups and observation. Similar to Madsbjerg's contextual "phenomenon," Kreitman and his team used inversion techniques to truly understand the customer's "journey" from the customer's, *not the company's*, point of view. In this way, OneMain was able to adopt a "customer-centric vision of what the [customer] experience actually was, rather than what the process was supposed to be."

Context is everything, we know that. And it is encouraging to think that the otherwise too-simplistic in-the-moment observational craze is leading researchers to think more carefully about incorporating contextual meaning – humanity – into their research designs.

Image captured from: <http://www.icr.ac.uk/news-features/latest-features/mel-greaves-science-writer-of-the-year-2013/unravelling-the-complexity-of-cancer>

# The Many Faces of Qualitative Research

October 13, 2014

Qualitative research is not any one thing. It is clearly not any one method but it is also not any one technique or process. Much of the diversity in how and in what manner qualitative research is



utilized can be attributed to the researcher’s particular discipline or field of study. This is because each area of study brings with it its own set of priorities and concerns that mandate a particular qualitative approach. Importantly, this provides an opportunity for all qualitative researchers to extend their reach to learn from other researchers both within and outside their own disciplines. By broadening their boundaries and world view of what constitutes qualitative research, researchers can make better – more informed – choices in the development and implementation of their research designs.

Here are just a few examples of how the qualitative-research focus can vary across different disciplines and how that can translate into the need for particular techniques or emphases in the research design.

Discipline	Special Focus/Sensitivity	Technique/Approach
Sociology	Disaster victims – Low-income families & minorities (see <a href="#">Peek and Fothergill</a> ).	<ul style="list-style-type: none"> <li>· Focus group recruitment via key informants who create “buy in” with victimized groups such as Muslims.</li> <li>· Small, “friendship” focus groups so that participants who are traumatized by disaster may be comfortable talking about the events.</li> <li>· “Spontaneous” focus group recruitment that allows any victim access to group participation (beyond the usual group-size limit) because of victims’ urgent need to share their experiences.</li> </ul>
Health care	Life changes due to illness & people with disabilities.	<ul style="list-style-type: none"> <li>· Storytelling over time (longitudinal research) to fully understand the impact of cancer treatments, the experiences of living with a debilitating illness such as fibromyalgia, and the like.</li> <li>· Giving appropriate access to the research for people who are blind, deaf, or otherwise physically disabled. For example, providing ramps at facility locations and modifying a face-to-face or online study for the phone.</li> </ul>
Marketing research	Behavior & attitudes in the fast-changing & complex world of consumerism.	<ul style="list-style-type: none"> <li>· Quick adoption of “the latest” in technology that serves to speed up the research process, e.g., online bulletin boards, mobile research.</li> </ul>

		<ul style="list-style-type: none"> <li>· Quick adoption of the most recent thinking about purchase behavior that promises to offer new, more predictable insights, e.g., abandoning traditional methods for in-the-moment mobile research and paying attention to what people do, not what they say.</li> <li>· Likewise, researchers may distance themselves from what people say (the rational responses to questions) and attempt to gain more meaningful insights by circumventing the rational mind via projective techniques, eye tracking, neuro-feedback, and the like.</li> </ul>
Psychology	Emotional & psychological issues. Vulnerable/hard-to-reach population segments.	<ul style="list-style-type: none"> <li>· Creating a “safe” research (group, IDI) environment, e.g., by stating “ground rules” to assure participants that all comments are safe from criticism and public disclosure.</li> <li>· Likewise, “democratic and balanced” group facilitation.</li> <li>· Opt-in vs. “forced” recruitment allowing participants to respond to promotional material rather than being screened and asked by a recruiter to participate in the research.</li> <li>· Special attention to follow-up “thank you’s” such as “hanging back” after a focus group to allow the moderator to personally thank the participants while also enabling them to speak privately with the moderator.</li> </ul>

Image captured from: <http://fineartamerica.com/featured/the-many-faces-of-eve-gun-legler.html>

# Qualitative Content Analysis: The Challenge of Inference

November 22, 2014

Back in April 2013, [a post in RDR](#) talked about the “daunting job of conducting a content analysis



that reveals how people think [the “stream of consciousness”] while at the same time answers the research question and takes the sponsoring client to the next step.” The article outlines the basic steps in a content analysis, including the analysis and interpretation phases of the process. Making interpretations from a content analysis are tricky things, esp., when conducting a “primary content analysis” when the content being analyzed is derived from non-research-related, pre-existing sources such as newspapers, blog posts, Hollywood films, YouTube videos,

television broadcasts, and the like. The issue here is the “trap” content analysts can fall into by (a) thinking there are causal relationships in the data when there are not, and/or (b) trying to build a story in the shape of their interpretations when the story (based on the data) has little merit. In this way, an overabundance of subjectivity can creep into the qualitative content analysis method.

These traps, related to causality and storytelling, are fairly easy to fall into unless a systematic and conscientious approach is taken in the analysis and interpretation phases. In particular, there are three characteristics of textual and non-textual material used in primary qualitative content analysis that may stymie the analyst’s ability to draw meaningful interpretations:

1. **The original act of constructing the content material (e.g., the document, video, or photograph) may have altered the meaning of the subject matter.** For example, in a study examining a series of blog posts regarding Detroit’s inner-city crime, the researcher may be unable to discern the realities of crime in Detroit because, by the mere act of writing about it, the writer has (deliberately or not) reformulated its true nature and given the reader a biased account. Therefore, what the researcher may be studying in this example is the writer’s rendition of inner-city crime in Detroit, not the actual nature of the crime “scene” itself.
2. **The instability or unpredictability of the content.** For example, politicians may routinely shift their communication “sound bites” depending on the audience, the speaking environment, or the “political mood” in the country at any one moment in time. In these cases of inconsistencies in the content, the content being analyzed may have little or nothing to do with the natural variation in the topics of interest but instead are due to the whims of the creator.
3. **The content is often a product of a group of people rather than one individual.** An example of this are the documents created within corporate or governmental organizations, which do not reflect the thinking of any *one* person but rather are a product of a team or group of people. Examples can be found in a variety of source material, especially in video or films and broadcast media where multi-authored creations may obscure true intentions

and thereby challenge the researcher's ability to infer meaningful connections in the content. Fields (1988), for example, conducted a qualitative content analysis of television news, observing that the coverage of "right-wing Christian fundamentalists" usually showed reporters standing near churches, an American flag, or the White House, and came to this conclusion: "The juxtaposition of these symbols conveyed the message that fundamentalists were seeking political power" (p. 190). This interpretation might have been more credible if these newscasts were the creation of a single individual who made all the on-air decisions and whose position on the Christian fundamentalists was explicitly disclosed. But, as a product of many people in broadcast news with varying agendas, alternative rationales for the backdrop exist, e.g., churches might be considered an appropriate setting to report on a Christian group, or the American flag might be deemed a suitable prop given that Christian fundamentalists are an American phenomenon.

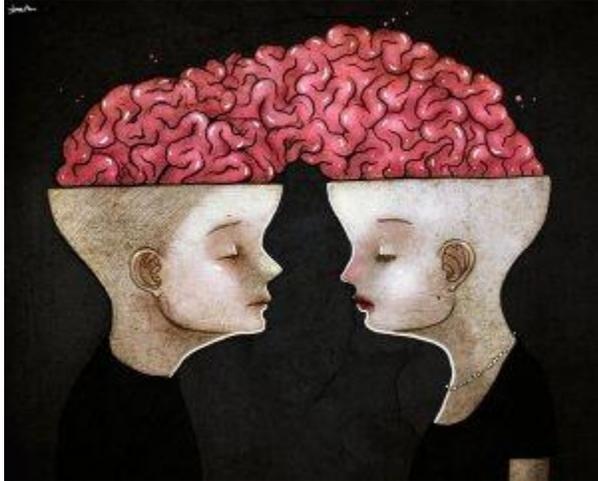
Fields, E. E. (1988). Qualitative content analysis of television news: Systematic techniques. *Qualitative Sociology*, 11(3), 183–193.

Image captured from <http://quickgamer.net/games/criminal-case/cases/scenes-4-to-6/>.

# Qualitative Research: Using Empathy to Reveal “More Real” & Less Biased Data

November 29, 2014

The fourth edition of [Michael Quinn Patton](#)'s book [Qualitative Research & Evaluation Methods](#) has just been published by Sage. It is a big book – over 800 pages – with updated and new content from earlier editions, including something he calls “ruminations” which are highlighted sections in each



chapter that present Patton's commentary and reflections on issues that have “persistently engaged, sometimes annoyed” him throughout his long career in qualitative research. Patton has made some of these ruminations available online via his posts on the [betterevaluation.org](#) blog.

In his November 14<sup>th</sup> post, Patton shares his [“Rumination #2: Confusing empathy with bias.”](#) In it, he raises an important issue – having to do with the personal nature of qualitative research and how that impacts data collection – that, on some level, runs through the qualitative-quantitative debates waged by researchers who argue for one form of

research over another. Such a debate might involve a survey researcher who, entrenched in statistical analysis, wonders, ‘What is the legitimate value of qualitative methods given its focus on the convoluted intricacies of feelings and behavior which are often conveyed by way of others’ nebulous stories?’ All of this convoluted interconnectedness is enough to stymie some quantitative researchers, and yet it is the stuff – it is the *juice* – that fuels the qualitative approach.

Is “getting close” to research participants by truly empathizing with their life situations – or sincerely trying to understand what they are saying in response to questions by “walking in their shoes” – interjecting bias that damages the final outcomes leading to false interpretations of the data? And if that is the case, what is the justification for qualitative research in the first place? After all, if its “juice” is the personal connections researchers make by way of empathizing with participants; yet, it is this empathy that makes the results suspect – Well, it is no wonder that there are some who perpetuate the qualitative-quantitative debates.

All research with human beings is about the human experience. All research is designed to tap into what it means to have a certain experience – regardless if that experience is a fleeting thought, a sensation, a sharp attitude, an impulse, or deliberate behavior. *Qualitative* research celebrates the humanness of these experiences. By rooting out the personal connections that are the essence of these experiences, qualitative research methods animate the thought, the sensation, or the impulse behavior in order to expose the experience for what it truly is. In this way, the experience has been laid bare for all to see.

It is precisely because of their empathy – the ability to observe and listen from the participant's standpoint – that qualitative researchers routinely uncover [how people think](#), revealing the interconnectivity that brings meaning to the experiences that lie at the center of their research. This level of meaning – this laying bare of the connections – gives the researcher an unfiltered view of

the human experience which, some could argue, seems “truer” and “more real” – that is, less *biased* – than survey data based on forced responses to closed-ended questions.

So, empathy is good. Empathy enables the researcher to come to terms with how *other* people think by thinking like them; which may, at the same time, provide clarity and actually *reduce* a form of bias in the data. Indeed, empathy may be the essential ingredient lacking in survey research to release the pent-up bias inherent in data that stems from the failure to look for (and make) the connections that define the human experience.

Image captured from <http://berkozturk.deviantart.com/art/empathy-211500476>