ESSENTIAL

DEPTH Interviewing

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A flexible guide to competent and creative interviewing in Qualitative Market Research

QM
QUALITATIVE MIND
Professional Training

Depth Interviewing

Knowledge, skills and behaviour for professional depth interviewing: foundation level

Joanna Chrzanowska FMRS

Introduction

This eBook will help develop people who are new to qualitative research into competent depth interviewers, at a foundation level. If you are studying for a qualification, you will need most of it. If you urgently want some interviewing skills, click straight through to the relevant sections.

The focus is on interviewing, but you need to understand the context within which it is used. There are optional sections on the research process, qualitative research and its methods, sampling and recruitment, and Codes and ethics.

> *"Interviewing is rather like a marriage: everybody knows what it is, an awful lot of people do it, and yet, behind each closed front door, there is a world of secrets."*
> *(Oakley, 1981)*

Interviewing skills include: writing or adapting topic guides, presenting yourself as a professional, managing the research relationship, eliciting and listening skills including probing, challenging and summarising. You will need to understand the basics of using stimulus material and simple projective techniques.

Finally, an interviewer needs an awareness of how research findings will be analysed, in order to elicit the most useful information and insights.

Reading the book will equip you with the knowledge, but you will still need to practice the skills. There are a number of suggested exercises but the most important is to get some feedback on your practice depth interviews. You will find feedback forms at the end of the book. Aim to get a more experienced colleague to help you with this.

Notice that the skills of listening and eliciting information will serve you well in many parts of your life, both personal and professional.

Joanna Chrzanowska FMRS

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2. Defining and understanding 21st C qualitative research *Understanding the potential and limits of qual so you can use it effectively*	• Definition, scope, key benefits and drawbacks of the qualitative approach • What it is. what domains it covers • Sample sizes • Benefits and drawbacks • How qualitative research is valid	*Reading* *Quick Quiz*
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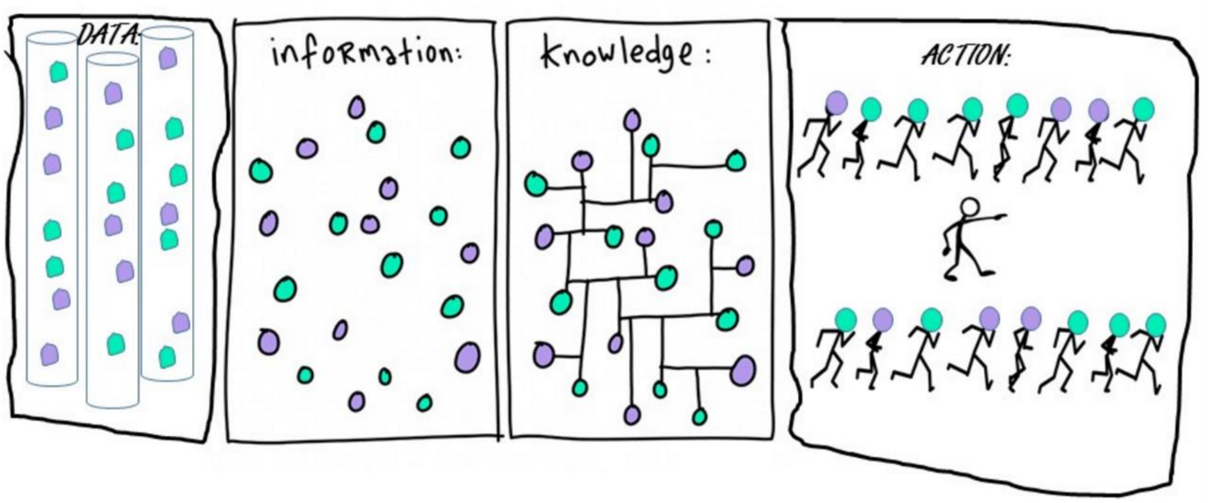
Overview of market research



Meme based on an original by Hugh Macleod [Information knowledge blog]

Market and social research turn data into evidence, that allows businesses and organisations to take action that will further their objectives.

Data are the 'facts' that information is grounded in. These can be objective or subjective facts, measurements, attitudes and opinions. Information is captured data. Knowledge is how information fits into a person's (or organisation's) cognitive map of the world, and enables the use of the information to achieve objectives.

Research is a process by which knowledge is produced.

"Market and social research is about gathering and analysing data to explore, to describe, to measure, to understand and to explain. The practice of research involves defining the problem, designing research to provide the necessary evidence to address it, collecting and analysing data, and interpreting and applying the findings to the original problem."
from 'The Practice of Market and Social Research' by Yvonne McGivern[1]

The more robust and credible the research, the better the decisions that can be made.

[1] A textbook for the MRS Advanced Certificate, and recommended if you want more information about the types and uses of market research. It covers both qualitative and quantitative research.

Do you need to read this section?

Could you answer the following questions?

- What are the key differences between good quality and poor quality market research?
- Name five client needs and expectations from research. Name three expectations that clients feel are not being fully met.
- What is secondary research?
- How many differences do you think there are between qualitative and quantitative research: 3-5, 6-9, more than 10?

1. Overview of the nature and purpose of research

What is good quality research?

Active, diligent and systematic,
production of evidence,
to reveal new facts, theories, principles
to create meaning and understanding.

Good quality research links research objectives to corporate objectives. The starting point discovers what the organisation wants to achieve after the research. This guides the entire process.

The main uses of market research

The environment in which the organisation operates. Understanding trends, societal developments, market dynamics, competitors, opportunities and threats

Understanding users/ customers / stakeholders, building and enhancing relationships and loyalty, identifying needs, understanding how to influence behaviour, customer journeys/experience.

Strategic planning: developing and monitoring strategies and tactics

Communication: how best to communicate, messages, channels, advertising and communication strategies and executions

Products and services: to develop or adapt, understand brands, pack designs, pricing, distribution channels, etc.
Market research helps organisations set priorities and build knowledge.

Limits on the value of research

These include

- Gathering data for its own sake, not defining how it can be used
- Poor definition of the problem, not understanding the brief
- Inappropriate research design and methods used
- Limitations of the methods
- Lack of quality control, allowing bias and poor quality data
- Poor interpretation of the results
- Misuse of the findings by decision makers

2. Roles in market research

These are changing rapidly, but usually involve:

Someone from the **client organisation** whose role is to liaise internally, identifying research needs, and with external suppliers to get those needs met. They may be called a research manager, insight manager, analyst, customer experience manager, chief listening officer – the titles get more creative every day.

The researcher (research executive, consultant) who will to a greater or lesser degree help with the process of identifying the problem, writing briefs/ proposals, designing, carrying out, interpreting and presenting the research. Some remain external and independent; others may be embedded in the organisation.

Both clients and researchers will interact with marketing, sales, research and development, advertising, design, communications etc.

Take a guess at which needs are not being met as effectively as they could. Then look up:

The top 25 unmet needs of clients
Green Book Blog

3. Client needs

Clients will always expect researchers to do the work professionally, cost effectively, in time, and with the impact that effective insight brings. Clients also expect:

- Demonstrable understanding of their particular issues
- A proactive relationship, with input from the researcher
- Consultation on best practices and methods
- Knowledgeable staff
- High quality data and analysis

- Added value by thinking through implications
- New ideas; trends, techniques, technology, methods
- Ways of reducing costs, getting better value for the budget

Researcher developing into Trusted Advisor

To fully meet client needs, the career researcher should develop ongoing knowledge and experience of:

- Relevant market sectors and practice areas
- Economic, social and political trends as well as micro trends
- New thinking in research and consumer understanding
- A wide range of research methods and their application

Reading, attending conferences, finding mentors, developing relevant interests will all help with formal or informal professional development. The Market Research Society runs a CPD (Continuous Professional Development) Scheme, to help manage researcher development. The newly acquired knowledge and skills are validated. CPD is recognised by a wide range of employers.

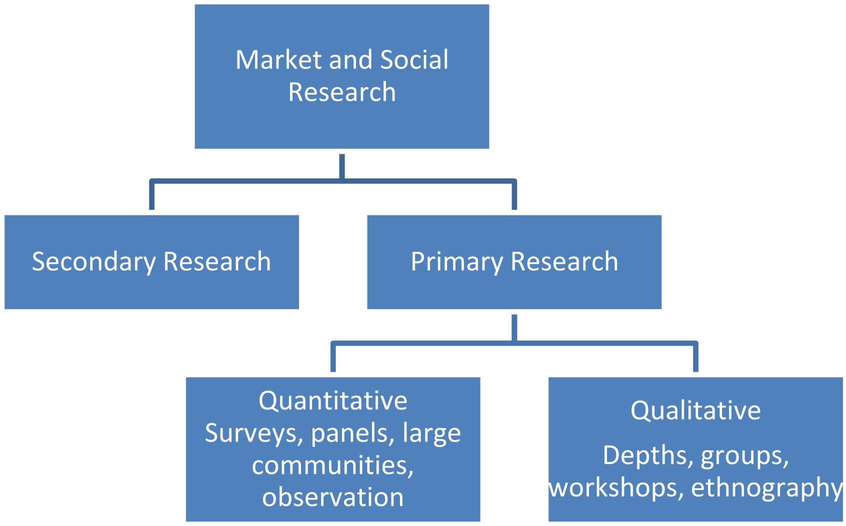
4. Introducing types of research and methods

Primary and secondary research.

Primary research is designed to generate or collect data for a specific problem; the information does not exist prior to the research.

Secondary data were originally collected for a purpose other than the current research objectives. Secondary data includes social media, sales and customer relationship data, customer feedback, etc. Searching for, analysing and using secondary data is called secondary research.

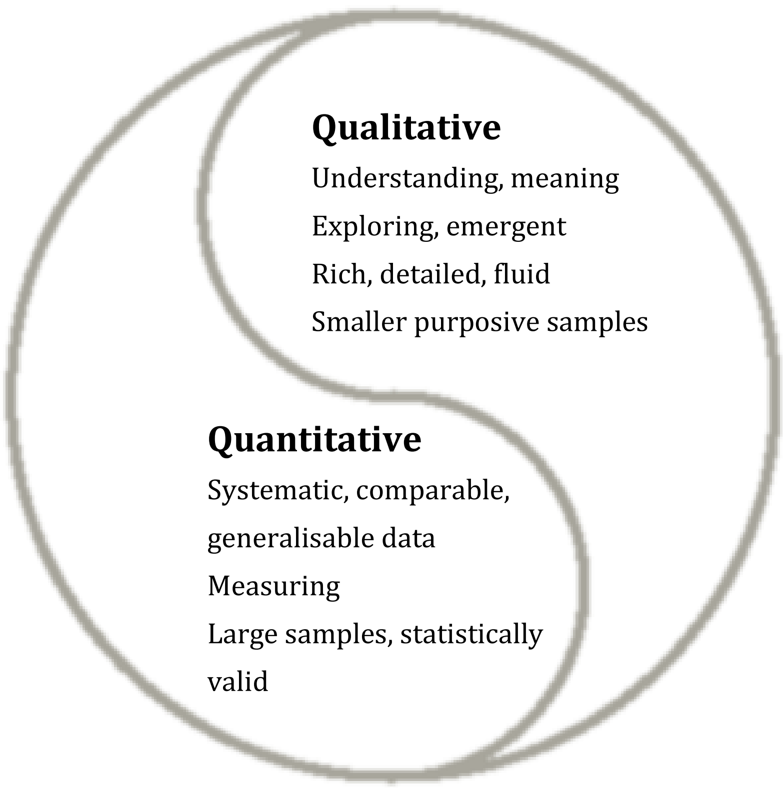
Overpage is a simplified overview of types of research. Both qualitative and quantitative data collection can be by face to face, telephone or online.



At the macro level, there are also cultural analysis methods such as semiotics and discourse analysis. At the micro level, methods for nonconscious measurement, such as eye tracking, the Implicit Association Test, Galvanic Skin Response etc., often require a qualitative input to explain the results.

5. Understanding qualitative and quantitative research

Qualitative and quantitative are complementary – the strengths of one make up for the weaknesses of the other.



Qualitative can be used beforehand to make quant questions more valid, and/or it can be used afterwards to make help explain some of the issues emerging.

The main differences are summarised below:

	Quantitative	Qualitative
Typical uses	*Describing size, frequency, behaviour; Segmenting, clustering; Testing, predicting; Correlating; Awareness; Evaluation. Requires known questions and known universe as basis for sample design.*	*Understanding, experiencing Exploring, innovating; Sorting and screening; Probing complex behaviour; Accessing the private, irrational, nonconscious, Explaining belief structures; Effective where questions & vocabulary are not known in advance*
Nature of questions and responses	*Who, what, when, where, how many? Structured questions; including closed questions. Relatively superficial and rational responses. Measurement, testing and validation.*	*Why? What is the meaning of…. More open and flexible, with probing. Below the surface and emotional responses. Understanding, exploration and idea generation.*
Sample size	*Relatively large. Aims to be representative of the target population/ statistically significant.*	*Relatively small. Samples are purposive – chosen for understanding*
Data collection	*Not very flexible – static design. Interviews and observation, standardised. More closed questions.*	*Flexible – emergent design. Interviews and observation, not standardised. More open-questions.*
Data	*Numbers, percentages, means Less detail or depth Nomothetic description (general principles) Context poor*	*Words, pictures, concepts, Detailed and in-depth Ideographic description (Rich, symbolic) Context rich*
Collection instrument	*Formal /questionnaire*	*Researcher is the interviewing instrument (reflexivity)*
Biases	*Biases and errors in research and question design and order (experimenter bias), recruitment, interviewer effect, respondent recall, social desirability, inaccurate responses, confounding of variables and other analysis biases*	*Biases and errors in method and technique choice and sampling, interviewer cultural biases and expectations, respondent recall, social desirability and interpersonal influences, inadequate stimulus, lack of analysis and interpretation.*
Type of analysis	*Statistical inference possible*	*Creating meaning through interpretation*
Reliability and validity	*High reliability, low validity*	*High validity, low reliability*
Perspective	*Etic – outsider perspective; understanding phenomena from outside, using external concepts and theories*	*Emic – insider perspective, understanding in terms and concepts that would have meaning to the people being studied.*

Underlying model of knowledge	*Scientific positivist paradigm (one agreed version of reality)* *Objectivity - 'Value-free' Knowledge is objective.*	*Interpretive /Constructivist (versions of reality depending on context)* *Knowledge is relative and socially constructed; the observer is part of the system and cannot be truly objective*
Cost	*Relatively low cost per respondent but relatively high project cost*	*Relatively high cost per respondent but relatively low project cost*
Infrastructure	*Dependent on extensive research infrastructure*	*Can operate with limited research infrastructure*

Qualitative reliability and validity (quality)

Qualitative methods are often criticized for being less rigorous than quantitative methods. For those who want a comparison of how to judge qual and quant, Guba and Lincoln (1985) proposed four criteria that better reflected the underlying assumptions involved in much qualitative research.

Traditional Criteria for Judging Quantitative Research	Alternative Criteria for Judging Qualitative Research
Internal validity – elimination of alternative hypotheses, validity of instrument	***Credibility** – results are credible to the end user and the participants*
External validity – generalisability and representativeness	***Transferability** – degree to which results can be transferred to other contexts.*
Reliability – consistency of the testing instrument and procedure-repeatability	***Dependability** – accounting for how the changes in the setting account for changes in the results*
Objectivity – distance between researcher and subject	***Confirmability** – the degree to which the results could be corroborated by others*

Qualitative research is useful in exploratory and descriptive research:

- developing ideas for products, services and advertising,
- understanding social issues and development of social policy
- in providing information to develop and evaluate strategy
- to generate and develop ideas or hypotheses;
- to define the issues under investigation;
- to find out how people think and feel and behave,
- How they talk about an issue or a product.

- It is also useful in exploring the findings of a quantitative study in greater depth, providing a wider context in which to understand and interpret them.

6. Defining and understanding qualitative research

Do you need to read this section?

You are presenting the results of some qualitative research to a sceptical audience. How would you answer the challenge below?

How can we trust the results of this research when you have only talked to 20 people?

Would you

A Say "well you could always do a survey if you want numbers"

B Say "qualitative research is about the why and it's more in-depth"

C Explain purposive sampling and saturation

D Use a metaphor to explain how making meaning is independent of numbers

E Something else?

Official definitions of qualitative research

AQR (Association for Qualitative Research)

Research designed to help organisational decision-making, focusing on understanding the nature of phenomena and their meaning, rather than their incidence. It tends to have the following characteristics: direct face-to-face contact between the primary researchers and those being researched; in-depth examination of small-scale samples or small numbers of observations; unstructured interviewing guides which are responsive to context and may be amended throughout the project; the researcher and his/her interpretative input is key to the process.

Key words in the definitions:
Meaning
In-depth
Context
Interpretive

QRCA (Qualitative Research Consultants Association)
Qualitative research is designed to reveal a target audience's range of behavior and the perceptions that drive it with reference to specific topics or issues. It uses in-depth studies of small groups of people to guide and support the construction of hypotheses. The results of qualitative research are descriptive rather than predictive.

An academic perspective from J Van Maanen (Professor of Organization Studies at the MIT Sloan School of Management,)
"The label qualitative methods has no precise meaning in any of the social sciences. It is at best an umbrella term covering an array of interpretive techniques that seek to describe, decode, translate and otherwise come to terms with the meaning, not frequency, of certain more or less naturally occurring phenomena in the social world…" Van Maanen (1983: 9)[2]

7. How to explain what qualitative research is?

- Qualitative research focuses on understanding and meaning – how people make sense of the world.
- It uses purposive sampling to choose participants who will help create the understanding, and include a range of perspectives.
- Interpretation leads from individual opinions to broader insights about human motivation, society, and culture.
- Effective qualitative research is more than information for decision-making; it can be structured and presented through storytelling to offer motivating insight and impact.

Making Sense	Making Meaning
"oh"	*"Aha"*
"I understand"	*"I get it and I am motivated"*
"This makes sense"	*"This connects with my interests"*
"It fits with what I know"	*"I will do something"*

[2] Van Maanen, J., 1983, Qualitative Methodology, Sage, London.

A quick bit of philosophy

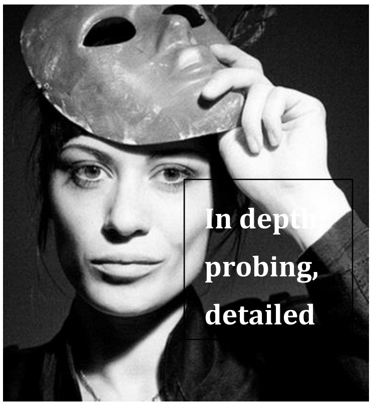
Quantitative research is underpinned by a positivist approach: there is an external world and an 'independent' observer who can gather evidence and knowledge about it. Think of it as 'the scientific method' aiming to create objective 'truth'.

Qualitative research does not deny there is an external world, but takes an interpretivist or constructivist approach. It assumes that human beings actively interpret and construct the meaning of their world – based on their experiences, their learning, and through social and cultural interactions. Qualitative knowledge is about understanding how others interpret and make sense of their world. And it is the interaction between the researcher and participant that creates that knowledge.

Therefore, the researcher is not independent of the knowledge. The focus of the research is finding out the participants' world view – how it is constructed, the principles on which it works, what influences it – and that is assumed to be the 'truth'.

Therefore qualitative research has the following characteristics:

It EXPLORES its subject matter. Even in describing or assessing, you take an exploratory approach in thinking and questions. By staying open and following up new leads you get EMERGENT information, which leads to insights.



Sometimes qualitative research is used just for speed and flexibility. But the real opportunity is to probe, to get the rich description and understanding that is missing from quantitative findings. We can get underneath the public personas to real needs and motivations.

In discovering meaning, both context and interpretation are key.
The same element has different meanings according to the cultural or social context – and the intentions of the individual. Two important questions that help with this issue are "why is this important to you" and "what does this mean to you?"

Qualitative researchers use empathy to understand the insider view, to listen to people's stories, and then to tell the story of the research findings.

8. What domains can qualitative research cover?

The intrapersonal (within the self) can be simplistically divided into the rational and emotional, or the conscious and intuitive (non-conscious).

The 'conscious and rational' – System 2 thinking about beliefs, attitudes, decision-making processes and influences, preferences, behaviours, customer journeys.
Things participants are aware of and can easily describe.

The 'intuitive and emotional' – perceptions, intuitions, moods, emotions, needs, motivations, anxieties, aspirations, brand images and relationships…. Much of this falls into System 1 thinking as key components of many decisions. This domain is a particular strength of qualitative research, using empathic listening and projective techniques.

Social: Individual decisions are much more influenced by others than we realise. Qual can show how social comparison and reference groups affect attitudes and behaviour. We can discover social norms, pressures for conformity, and see social influence dynamics in action.

Cultural analysis is useful when there is a defined set of rules, power structures, assumptions, values, symbols and language that directly affect behaviour. It can cover national or ethnic cultures, organisational cultures and social subcultures.

9. Dealing with the small sample size issue

New research users tend to approach qualitative research with a quantitative mind-set, crying; "*But you have only talked to (insert a pathetically small number) of people! How can this be valid?"*

You need to convince them that understanding does not require large numbers.

You can use the metaphor of understanding in qualitative research being like watching a play.

The outlines of the plot are written by quantitative research – the characters, the setting, what they do. But in qualitative we are aiming to get to know the characters, to understand their perceptions and motivations, what drives the plot?

How many times do you have to watch Hamlet to understand the characters and the plot?

- It may be a number of times, so you can focus on different characters and elements
- You will probably create theories as you go to aid your understanding
- You might read other people's interpretations for additional insight
- You will need to make your own interpretation based on the themes and actions

This is the same process as in qualitative research

YOU DO NOT NEED TO WATCH HAMLET 500 TIMES TO UNDERSTAND IT.

Understanding is produced by looking at the dialogue and actions in the context and questioning their meaning. The findings are not the quotes – they are about the significance of the words.

To continue the example from Hamlet:
THE WORDS: "*I have words to speak in thine ear will make thee dumb*"
THE THEME: recurring references to ears and poison in the play
THE MEANING: language is slippery, it distorts and manipulates. It has poisoned the minds of people and the state of Denmark.

See also Sample Design

10. The future evolution of qualitative research

The future of qualitative research is in the thinking and expertise. Learning to think qualitatively will future-proof a career in qualitative research. The qualitative sector has been identified as a key area of growth, partly as an increasingly needed counterbalance to big data.[3]

The definitions of qualitative and quantitative are still useful and recognisable, but the development of social media and online research is challenging these concepts.

Qualitative data sets are now found in social media, communities, customer experience, in addition to traditional methods. Increasingly the researcher works as part of a multi-disciplinary team, bringing understanding and insight

Welcome hypotheses and theories. Think beyond the brief. Learn from other disciplines, and from existing research.
The thinking needs to be diagnostic, integrated and logical. Hence the metaphor of the red thread. The **red thread** is like the plot of a story; it connects everything together.

11. The role of the interviewer or moderator.

The term 'interviewer' is commonly used for the person conducting a depth interview, but 'moderator' is used for conducting a group.
Key tasks in executing these roles include:

[3] MRS Business of Evidence 2016

- Proactively analysing and understanding the research brief
- Briefing and liaising with recruiters (sometimes)
- Managing the fieldwork process
- Designing a thoughtful and stimulating interview guide
- Conducting the interview or discussion
- Creating a safe environment for respondents to talk and share
- Managing the group or dyad dynamics and process
- Listening attentively, following up on relevant leads
- Deciding what to explore; when to probe, challenge, clarify, or summarise
- Managing any observers
- Analysing and interpreting the data, and reporting the findings

12. Summary: benefits and drawbacks of a qualitative approach

- Qualitative research focuses on understanding and meaning – how people make sense of their world
- It uses purposive samples to include a range of possible perspectives
- It uses a wide range of flexible methods, tools and techniques to probe beyond superficial response and produce rich description.
- It is exploratory and emergent, leading to insights about motivations and behaviour.
- It brings explanation to decision-making
- It can cover the rational, emotional, social and cultural domains and work with the nonconscious drivers of behaviour.

However:

- With sample sizes chosen for understanding rather than statistical significance it cannot be representative
- The quality of the research depends on the skills of the researcher in planning, fieldwork, analysis and interpretation.
- Each qualitative method has its own limitations, and all interviewing methods are subject to the limitations of participants' memory, biases and ability to express thoughts and feelings.

Last word from James P Spradley, author of over 20 books on qualitative and ethnographic research. This is how qualitative researchers need to think:

"I want to understand the world from your point of view.
I want to know what you know, in the way that you know it.
I want to understand the meaning of your experience, to walk in your shoes, to feel things as you feel them, to explain things as you explain them.
Will you become my teacher and help me understand? "

13. Quick Quiz

Read the briefs below and decide whether you would recommend the use of qualitative or quantitative research – or both. If both, which would you do first? For answers, click here

Costco is a membership warehouse that sells at discount prices. It has a co-branded credit card for customers to earn rewards when they shop. Costco has just changed card partnerships from American Express to Visa. Costco customers will now need to use the Costco Anywhere Visa - not the American Express Costco card. Many members say they have not received their new Costco Visa card in the mail or are struggling to activate it. The context is that the competitive Wal-Mart Sam's Club is expanding. And there are challenges from online retailers, specifically Boxed, and increasingly Amazon.

Research is needed to assess the potential damage to customer loyalty by these credit card problems. Costco management cannot implement a solution (that is up to Visa) but need to know whether, and what type of crisis management to implement.

Qualitative, quantitative or both?

There is a high rate of stress and mental illness among healthcare workers, yet many continue to work despite symptoms that affect their performance. There is a 'conspiracy of silence'. Workers with mental health issues are typically ostracized and do not get the support that they need. Early identification and support can improve work outcomes and facilitate recovery, but more information is needed about how to facilitate this process in the context of healthcare work.

Research is needed to explore the key individual and organizational forces that shape early intervention and support for healthcare workers who are struggling with mental health issues, and to identify barriers and opportunities for change.

Qualitative, quantitative, or both?

POM is a pomegranate drink. An ad featuring a frayed noose has been banned for misleading consumers by claiming that the juice could help consumers "cheat death" and live longer.
The Advertising Standards Authority received 23 complaints that the claims in the ad "misleadingly exaggerated" the health benefits of drinking the juice.

POM Wonderful has defended the ad, arguing that it was common in advertising to make claims that were "so exaggerated it could not possibly be taken seriously by consumers". It said that it believed such outrageous statements were permissible under the UK advertising code.

POM now needs some research to back up its statement. Quantitative, qualitative or both?

Ethical Standards and Data Protection

Do you need to read this section?

Can you confidently answer these questions?

When are you allowed to use video clips from the research in your presentation?

My client wants to save money and give respondents vouchers for their products. Is this allowed?

What precautions should you take for remote viewing of research?

Respondents have been recruited from a list and want to know where we got their names from. What do we tell them?

Respondents want to know who the research is for, before they decide to attend but the client thinks it will bias them. What do I do?

The client has published some of my research findings in a rather misleading way, but there is nothing I need do about it. Correct?

During World War 2 Nazi doctors experimented on people in concentration camps. As a result of the Nuremberg trials a Code was formulated for medical research. It includes such principles as informed consent, absence of coercion; and beneficence towards experiment participants.

14. The importance of ethical principles

Ethical principles set standards of conduct for professions. They are important in research, so those involved – researchers, participants, clients and others – know what is and what is not acceptable behaviour. The primary focus is the setting of standards in relation to the treatment of research participants, on whom research depends. However, there are also obligations to clients and to prevent misrepresentation of findings.

15. The main ethical principles re participants

- Voluntary participation
- No harm to the participants
- Informed consent
- Anonymity, confidentiality (privacy)
- Transparency
- Not deceiving subjects

Voluntary participation

Consent should be based on a clear understanding of what the research will involve and how the data will be used. The participant should be told that he or she has the right to withdraw from the research at any time and is under no obligation to answer any of the questions asked.

If you think the research process cannot avoid raising issues that might worry people, come prepared with leaflets and helpline numbers to give at the end.

No harm to the participants

At all times during the conduct of research participants should be treated with respect and sensitivity. The onus is on the researcher to ensure respondents' emotional as well as physical well-being.

Informed consent

Respondents should be clearly and unambiguously informed about what is involved and how the data they provide will be used. The nature of the research should not be misrepresented in any way. If a client database is used, the list source must be revealed if requested.

Anonymity is not the same as confidentiality

Anonymity and confidentiality are sometimes taken to mean the same thing but they are not.

The identity of a participant includes, as well as their name and/or address, any other information that offers a reasonable likelihood that they can be identified by someone who has access to the information. Examples include:

- Small sample sizes, such as in business or employee research
- Where data contains contextual information that permits identification
- Where data can be matched with publicly available information such as social media profiles
- Where data can be matched with other information such as transaction histories held by clients

Confidentiality in research is an agreement that identifying information will not be shared publicly, although the opinions collected will be reported. Bearing in mind the examples above, researchers must take care that any data they collect does not inadvertently identify participants. It is also good practice to separate the data from details of identifiable individuals and to store the linking codes securely.

In qualitative research, it is more realistic to promise confidentiality rather than anonymity. However data can be anonymised to help preserve confidentiality.

If you promise **anonymity** it means that nobody can identify a response with a particular respondent. Anonymisation is the process of removing, obscuring, aggregating or altering likely identifiers to prevent identification of individuals. This is not always possible (or desirable) in qualitative research:

- Personal data are collected for quality control and verification purposes and they remain attached to the data record at least until quality checks have been made.
- The interviewers are likely to know a good deal of identifying information about their participants, even if they don't report it
- Some of the value of the data comes from recounting rich and detailed personal stories, histories, using actual places and brands. Replacing everything with pseudonyms can compromise the value of the research to the client.

Transparency

Research can be conducted without the promise of either anonymity or confidentiality. For example, data can be collected on an attributable basis (only with the full consent of the participant).

Deceiving participants

Deceiving people in order to get them to take part in research is unethical. It's unethical to tell a respondent that the interview will take 15 minutes if you know it will take 45 minutes. The reputation of research has been harmed through 'sugging' or selling under the guise of research (and 'frugging', fund raising under the guise of research).

Respondents must be informed about:

- Any recording, or observation during an interview
- Venue for qualitative research
- The identity and bond fides of the interviewer
- That the interview is carried out according to the Code
- The general subject of the interview
- The purpose of the interview
- The likely length
- Any costs incurred by the respondent
- Who will administer the incentive (if any)?

If you feel identifying the sponsoring organisation might bias the research, it is permissible to do that at the end.

16. In-home interviews, vulnerable respondents, sensitive subjects

Extra care has to be taken, both with recruitment and informed consent, in some situations.

In-home interviewing/ observation/ activities

- Fully informed consent in advance - including activities they may be asked to do, their purpose and rationale
- Clear right to withdraw at any time
- Avoid situations where the interviewer could be accused of misconduct. Use chaperones if required.
- Care for interviewer's personal safety – notify others beforehand

Children (Children under 16, young people 16 and 17)

- Need permission from a *responsible adult* to *invite* the child to take part – the child must give permission also. Permission must be in a verifiable format (not just verbal)
- Must be fully informed as per Code
- Carried out in a safe and appropriate environment (refreshments and incentives also safe and appropriate)
- Care with sensitive subject matter, avoiding illegal, anti-social, age-inappropriate or upsetting subjects unless approved by an ethics committee
- Great care to avoid leading questions and special awareness of adults as figures of power

Vulnerable respondents - people with disabilities (including visual impairments, hearing impairments, BSL users, learning disabilities, poor mental health)

- First establish level of support needs, presence of carers, proxies or advocates.
- Ethics protocols include: competence to give consent, interests of participant vs researcher, voluntary & free from coercion.
- PVG, DBS registration advisable
- The participant should speak for themselves as much as they can

17. Summary of key points of the Code of Conduct

The Code of Conduct applies to MRS and ESOMAR Members but the Data Protection Act applies to everybody who wants to store personal information. The EU is introducing the General Data Protection Regulation – which will affect anyone trading with the EU.

Researchers shall:

1. Ensure that participation is based on voluntary informed consent.
2. Be straightforward and honest in all their professional relationships.
3. Be transparent as to the subject and purpose of data collection.
4. Respect the confidentiality of information collected in their professional activities.
5. Respect the rights and well-being of all individuals.
6. Ensure that participants are not harmed or adversely affected by their professional activities.
7. Balance the needs of individuals, clients, and their professional activities.
8. Exercise independent professional judgement in the design, conduct and reporting of their professional activities.
9. Ensure that their professional activities are conducted by persons with appropriate training, qualifications and experience.
10. Protect the reputation and integrity of the profession.

Note that the Code is not just about protecting respondents. Other issues include:

- Obeying national and international law
- Dealing with conflicts of interest
- Research design to meet client standards
- Qualitative reports must accurately reflect findings
- There is a duty to correct any misleading published findings

Quick quiz

Answers to the questions at the start of the section can be found by clicking on the following links:

Can we include video-clips from consumer group discussions in agency presentations to clients and for their further use on the client's internal network?

My client would like to offer vouchers redeemable only for their own products as incentives for respondents. Is this acceptable?

My clients can view groups remotely via the Internet through a secure password protected channel. The client could potentially view the laptop anywhere and therefore someone else could see the group.

My client has supplied me with a list from which to recruit groups of customers but doesn't want to be identified. Some respondents are demanding to know where I got their names. What should I tell them?

Caller has been asked by a research agency to take part in a group discussion. When the caller asked the name of the client, the agency was vague and did not reply. The caller persisted. When must I reveal the identity of the client?

An agency has recently completed a project for a client. The researcher has learnt that the results of the study appear in a press release that states the correct figures from the report but presents them in a misleading manner.

Link to Market Research Society Code of Conduct, Data Protection Guidelines

Link to Esomar Codes and Guidelines, including for online and mobile research

Qualitative Research Methods

Can you answer the questions below?

Do you need to read this section?

Name two qualitative methods other than groups and depths.

You need to interview employees about a sensitive issue. What method would give the greatest anonymity?

Your client wants some new product ideas for their home fragrance range. What method would you suggest?

What are the main drawbacks of interviewing methods and how might you overcome them?

18. What qualitative methods can you use?

Qualitative research is mainly associated with depth interviews and focus groups, but there is a much wider range of methods available. Choice of method has to be a balance between:

- Degree of accuracy and detail: how important is it that people remember and describe behaviour and influences correctly?
- Influence of context: might they say one thing in research but behave differently due to contextual factors?
- Depth: do you need techniques to access the nonconscious?
- Individual vs social: do you want to get individual 'uncontaminated responses' or do you want a range of points of view /interaction / creativity / to observe social influence?
- Will a snapshot in time do, or do you need to follow over a period of time?

The main choices are:

*'**Methodology**' is the study of the principles and assumptions underlying the methods – the justification and explanation for their use.*

	Discuss	Observe	Collaborate	Other
Face to face	*Groups and Depths in various formats and styles*	*As observer or participant* *Observation and ethnography*	*Workshops Deliberative Citizens forums etc.*	*Tech plus co-discovery: Facial Coding Eye tracking Lifelogging Neuroscience* *Listening* *Semiotics Cultural analysis*
Online	*Synchronous online groups /depths Asynchronous Bulletin boards Communities*	*Autoethnography using mobile or webcam*	*Communities Co-creation Crowdsourcing*	

Summary of the main methods. If you want to know more about any of these, go to: www.qualitativemind.com/methods/

Type of method	Description / Benefits & Drawbacks
Face to face interviewing in groups ***Mini groups*** ***Extended groups*** ***Conflict groups*** ***Turnstile groups***	*Very flexible and emergent, groups more cost-effective than depths* *Range of perspectives and POV* *Many options for projectives and creativity techniques* *Stimulating but also safe for respondents* *Observation and probing of subtle feelings and reactions* *But need skilled moderating to manage dynamics* *Size of group limits respondents' share of voice; lack of context*
Individual Depth Interviews ***Paired*** ***Stream of consciousness*** ***UX*** ***Laddering*** ***Cognitive interviews***	*Depths better to follow individual and complex processes* *Uncontaminated response, no group pressure* *But more expensive and time consuming* *Both groups and depths require skilled interviewing and process management. They tend to be disconnected from the context of behaviour, so need techniques to reinstate context where possible.*
Online and mobile ***Individual depths*** ***Groups (synchronous)*** ***Bulletin boards*** ***Communities*** ***Blogs and diaries*** ***Auto-ethnography*** ***Lifelogging*** ***Immersive research***	*Work across regions and time zones with no travel cost.* *Online disinhibition effect for candour* *Can be anonymous* *Capture 'in the moment' images audio and video* *Combine with observational, diary and reflective tasks* *Can work longitudinally* *Drawbacks include:* *Can be harder to do in depth work, challenges for engagement & management,* *Create large volumes of data* *Not necessarily cheaper* *Restrictions of platform used, technology/connectivity issues*

Ethnography	*Ethnography is the main research method of Cultural Anthropology; the study of human culture and social organisation. It can include gathering of quantitative data.* *It focuses on the social and cultural implications of behaviour as seen from the participants' perspective. Ethnographic data includes:* *How society is structured, how people interact within their roles and relationships, the social and cultural significance of products and processes.*
Netnography	*The study of online naturally occurring groups, communities and cultures, using computer assisted methods, but focused on cultural analysis. It is used for holistic cultural communication, brand and choice understanding, and mappings of sociocultural online space.*
Observation ***Simple observation*** ***Participant observation***	*'The truth serum of qualitative research.'* *Shows the difference between claimed and actual behaviour. Shows habitual behaviour, spotlights the apparently inconsequential, shows influence of context. Unfiltered by memory or biases* *An observation schedule covers: space, actors, objects, acts, events, goals, time and observed feelings.* *Drawbacks* *Observation needs interpretation to make meaning.* *Visual information can be harder to decode* *Some 'observer effect'*
Experimental method	*Small scale experiments allow observation of actual behaviour and manipulation of influences.*
Collaboration and Consultation ***Workshops*** ***Deliberative research*** ***Panels and forums*** ***Consumer consultants*** ***Open Space technology*** ***Co-operative enquiry /Action research***	*Active participants for a more democratic approach, widely–based and informed decisions* *Thrive on difference and diversity* *Create buy in, team building* *Hard to manipulate outcomes* *Used a lot in social & political research* *Also for brainstorming & strategic work* *Require facilitation skills and process management* *Can be expensive and time consuming to organise properly.*
Technology based ***Eye tracking*** ***EEG*** ***Facial Coding*** ***Galvanic Skin Response*** ***Implicit Association Test***	*To access the nonconscious and bypass verbal rationalisation. They are included here because they often need some form of interviewing to make sense of the findings.*
Interrogating the culture ***Cultural analysis*** ***Semiotics*** ***Discourse analysis***	*Observing and analysing language and cultural artefacts rather than people.*

19. Groups or depths?

An in-depth interview is usually conducted on a one-to-one basis. It can last between thirty minutes to two hours. You would use in-depth interviews if:

- Your topic is of a sensitive or intimate nature
- You need to get detailed information on individual attitudes and behaviour
- You need to get beyond the socially acceptable view
- You need 'time-line' information (for example, to follow a decision-making process, observe use of a website)
- Your sample is difficult to find

Paired depths are useful with children and teenagers and in cases where more than one person is involved in the decision.

"The hallmark of focus groups is the explicit use of the group interaction to produce data and insights that would be less accessible without the interaction found in a group."

A standard group discussion or focus group involves six to eight people (ten to twelve people in the US). Originally there was a technical difference between a group discussion and a focus group, but nowadays 'focus group' is used for most types of group.

It may last 1-3 hours, and the discussion is guided by the moderator, using a topic- centred guide. They are more cost effective in terms of the number of respondents included and faster to carry out and analyse than depths. However, there is less information from each individual and group dynamics need to be managed.

You would use focus groups if you want:

- To see a range of attitudes and opinions
- Synergism, Snowballing, Stimulation, Spontaneity, Serendipity[4]
- Security – no individual feels pressured to answer, they can 'hide'
- You need to determine differences between people
- You want to understand social and cultural influences

[4] Hess, J.M. (1968) 'Group Interviewing' in Ring, R.L. (ed.) New Science of Planning, American Marketing Association, Chicago.

20. Different types of depth interviews

Depths are often characterised by how structured they are, but this is only part of the story.

Structured → semi-structured → unstructured

Structured interviews ask the same questions in sequence. Surveys are the most typical example, but some usability interviews (UX) might employ this at certain points of the interview. For example, giving all the respondents the same tasks, and using the same questions and probes, in order to compare reactions.

Most qualitative market research is semi-structured. There is a topic guide, and an overall sequence of presentation, but within that the interviewer can create questions as needed. Nor is it always necessary to use the same guide. As understanding evolves, so some parts may be left out and others added.

Truly unstructured interviews can be difficult for respondents, as they don't know how to start or what aspects to cover. Unstructured interviews are more likely to be used in an ethnographic context – the context itself provides some form of structure. For example, you can be observing an eating ritual, and you take someone aside and ask: "Tell me about what is happening here?"   Further questions depend on the answers you are given.

Depth interviews can involve different procedures:

Paired interviews	*Using the interpersonal dynamic. Useful where decision making is shared, or friendship pairs*
Stream of consciousness	*To access System 1 or fast thinking – before it has been processed. Not everyone can do this.*
Usability (UX)	*Focus on the app or website, involving various tasks*
Laddering	*A specific process for linking basic features with higher benefits and psychosocial values*
Cognitive interviews	*Developed by the police to help witnesses remember accurately*
Narrative	*People produce narratives about their identity and show how society and culture help them interpret their world.*
Biographical	*Understanding an individual or organisation in the context of their history*
Ethnographic	*With key informants, to understand social relations and culture relating to observed behaviour*

21. UX interviews (usability testing)

It is common to carry out UX interviews on small samples, using a script to ‘test’ the functionality of a website or an app. Participants are asked to ‘think out loud’ during the interview.

Although you need to be consistent in presenting tasks to participants (to compare their approaches to the same task) it is not necessary to follow a script word for word in the rest of the interview. Despite the use of the word **test**, it is not quantitative research that requires all the questions to be the same. You can think of it as **discovery** of problems or flaws in the design or the interface. You assume that if 5 or 10 typical users show misunderstandings or frustrations, then it is highly likely that other users will too.

While the objective is often simply to find errors in design or structure, UX interviews are a great opportunity to understand customers’ needs and motivations, and how well the website or app works in the context of the brand and the overall customer journey. As with other qualitative research, you discover what things mean to people:

- What it means to people to be able to complete a task easily (practical and emotional implications)

- How they experience this interaction with the brand, and what that means for loyalty/ their relationship

- What emotional, social and cultural influences affect decision-making and the context in which the website is used.

It is very worthwhile to spend some time at the start of the interview understanding context (what does the user want to achieve, how comfortable are they with sites/ apps, what feelings do they have about the brands involved?

During the interview, you can use open and emergent interviewing skills to probe and understand why they say the things they do. This will help you discover general principles as well as specific reactions.

Finally, a good review and summary of what has been learnt will pay dividends in terms of checking your understanding of what happened and why.

22. Advantages and drawbacks of interviewing methods in general

Benefits

People can tell their own stories in their own words, describe their experiences, priorities and frames of reference. Research by Tamir and Mitchell shows that people find it intrinsically rewarding to talk about their opinions and experiences.[5]

Most interviewing methods are flexible, responsive, can focus on emotions, build upon knowledge, ideas, and hypotheses – and generate data that can be easily analysed for content and meaning.

They allow for the use of projective and enabling techniques that can be visual, imaginative, or physical and these help compensate for some of the weaknesses.

Face to face interviewing methods allow the researcher to notice and probe lack of congruence (where the words and body language or paralinguistics don't match) and emotions that may not be fully expressed. Empathy is stronger through direct emotional contagion.

Online interviewing methods allow for longer relationships, a mix of active and reflective tasks and greater perceived anonymity for respondents. The 'online disinhibition effect'[6] (no eye contact, no judgment of physical characteristics, a sense of being invisible) can lead to greater candour and disclosure. In some cases online disinhibition can allow inauthentic personas and responses to develop.

[5] Disclosing information about the self is intrinsically rewarding
[6] The benign online disinhibition effect

The event of a memory is not the same thing as the memory of an event.

Drawbacks

We assume respondents have access to their needs, feelings and experiences and can tell us about them. But it may not be as accurate and authentic as we imagine. There are significant cognitive biases and memory biases.

There are limits to self-awareness of habitual behaviour, cultural norms, heuristic decision-making, and personal traits and motivations. Research shows that when people don't know something they offer a rationalisation. Choice blindness experiments have shown that people can be unaware of the real reasons for their choices. (Link to Choice blindness website.)

Interviews don't account for situational influence - temporary conditions that affect how buyers behave. They include physical factors, social situations, moods, lighting, and even scent.

The social context of interviewing leaves the respondent open to influences from the interviewer. Respondents will adapt their story according to perceptions of the interviewer. In groups there is an element of social theatre and impression management.

How to overcome these?

Be clear about how much any of these drawbacks matter to the usefulness of your research. If any of them do – aim to compensate.

- Use diaries to help with more accurate perceptions and recall
- Use projective and enabling techniques to surface non-conscious attitudes and emotions
- Use checks on behaviour and observation of habits
- Use Bracketing and best practice in interviewing to minimise interviewer influence
- Find ways of bringing in situational influences – enhanced recall interviewing, stimulus material, observational research
- Be aware of cognitive biases in planning and interpreting
- Include questions that will help you assess social factors and influences on the individual
- Use semiotics to help with a cultural framework

Qualitative thinking and research design

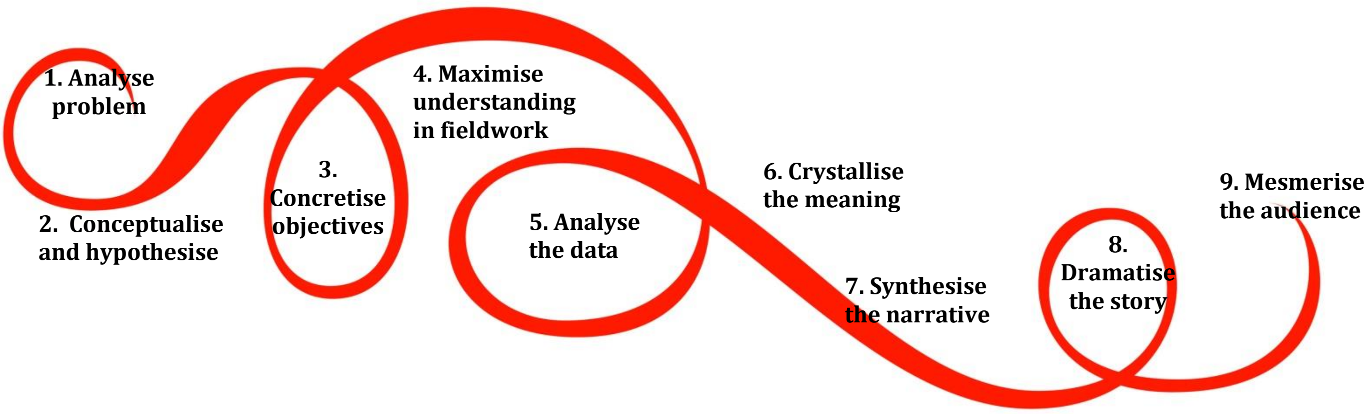
The secret is using the red thread of thinking right from the start. It helps you to focus on the most useful insights in the interview, and move beyond description to explain and predict.

23. Red thread thinking

There should be a clear 'red thread' of thinking that arises from the client brief and connects the method, analysis and findings. Once you are certain you have understood the brief, you need to project ahead into consumer's lives and ask "What might be going on here?"

You can call it a framework, a hypothesis or a point of view, but when you have developed it, it becomes the fulcrum of the whole research project. It enables you to name and frame the concepts you are researching; the possible relationships between them; the types of explanations the research might produce; and the methods and samples it will need to use.

The framework speeds up analysis and interpretation because it has primed your brain. It will also help frame your presentation story. The connections between the emergent concepts are often the basis of a great plot.



Importantly, you use it to justify your choice of method and techniques, BUT remain open during fieldwork to emergent information that could change your ideas. To avoid confirmation bias, your questioning will be open and grounded in the experience of the respondent, you will check any interpretations with respondents, and you will let go of any hypotheses for which there is no evidence. If you don't start with conscious hypotheses you will be applying unconscious ones – which is much more dangerous.

24. Go from business objectives to research objectives

What do business objectives look like?

Even if you are not in the business sector you will have business objectives. Typically, these are going to be about *increasing usage, acceptability or value* of something that you own or are responsible for. For example:

- Getting more students to use the library facilities – or the same students, but more often or more effectively
- Upgrading a business service to better meet the needs of its users, who represent different segments
- Increasing the market share of a deodorant
- Increasing charity donations by creating participation events
- Building a broader-based healthcare business by launching a new product in wound care
- Educating children about healthy eating to avoid health problems in the future

Some business objectives will be about *reducing cost, waste or behaviour*, or will be set in a *competitive context*. You might want to stop anti-social behaviour or react to a competitor in the market. Some will be about *developing new products, services, ideas or behaviours.* You know it's a business objective when you can see the financial implications – even if they are a long way down the road!

How do you get to research objectives?

You have to ask

- What decisions will be made to achieve the business objective?
- What information will be useful to support those decisions?

Examples of qualitative research objectives would be:

- *Understanding* what affects library usage behaviour
- *How can* we segment smaller business prospects by factors that influence their ambitions?
- *Exploring* how to reposition a deodorant brand to appeal to teenage boys without alienating older male users
- *Examining reactions* to charity events to see what would work
- *Assessing* the reactions of healthcare professionals in order to understand how best to market the wound care product

- *Understanding* how children learn about healthy eating and what are the most effective influences?

Notice these are quite high level objectives, and each of them can be broken down into more detailed research questions.

How do you develop the more detailed research questions?

Those high-level objectives are not questions that could usefully be asked directly of a respondent. Can you imagine asking a 16-year-old boy 'how should we reposition L'Oréal Men Expert to appeal more to you without upsetting our core market?'

The qualitative approach is all about exploring and understanding from different perspectives. Some of the things you consider are:

- What is the relevant behaviour and what drives it?
- Is it rational, emotional, social or cultural?
- How habitual is it? How could it be changed?
- What is the context for the behaviour?
- What conscious and unconscious cues might affect it
- What cognitive biases might be in operation?
- What is the competitive context? What alternatives are there?
- What are the needs and ambitions, personal and social?
- What are their fears and anxieties – what pushes them away?
- What are their beliefs and understanding about the product area, your organisation / product / service? What are these founded on? What is accurate and what is hearsay or myth? Where does this information come from?
- What sources of information do people have?
- How trustworthy or influential are they? In what ways?
- How does your offer map out in terms of rewards/gains versus effort/ drawbacks/ potential losses? This would include pricing and value for money, if relevant.
- What in your offer are people drawn to and why? What are the emotional benefits or consequences of what you are proposing?
- How much do they believe what you are saying?
- How do you best communicate with them – what channels, what strategies? How do you best engage?
- What are the longer-term implications for the organisation or brand?

25. What is research design?

Do you need to read this section?

Research design is important to deliver the evidence necessary to answer the research problem as accurately, clearly and unequivocally as possible. A sound research design is the framework on which good quality research is built.

Think of the research as having to provide evidence and think about what kind of evidence you need. For example,

- A before and after evaluation
- A description of what happened
- Exploration of various hypotheses
- Circumstantial evidence that adds up into a good story

Taking a step back helps create insight. Accidents Waiting to Happen, by Gordon Pincott (MRS Conference 2005) describes how the famous Oxo campaign was created from research that explored, not family meals or gravy making, but how women felt about their lives as mothers, providers and income earners in a changing society.

You may also need to ask WHO the evidence has to convince. A publicly accountable body may need more robust evidence (a larger sample size or a broader sampling strategy) than an organisation familiar with research, and accountable only internally.

a) First level of research design

At the **first level**, research design is about the logic of the research, its framework or structure.

- Defining the research problem
- Thinking about the end use of the data
- Deciding on the sort of evidence you need
- Deciding on the logic and structure of the research
- Choosing the design that will deliver the evidence you need

b) Second level of research design

At the **second level,** it is about the 'mechanics' of the research – what type of data (primary or secondary, qualitative or quantitative or a combination), what method of data collection, what sampling strategy, and so on.

- Deciding on the type of data and the method of data collection:
- Primary or secondary (review of existing data) or both
- Quantitative or qualitative or both
- Groups, in-depth interviews, internet follow ups and so on

26. Mixed methods for optimum qualitative design

__Triangulation__ – by combining multiple observers, theories, methods, and empirical materials, researchers can hope to overcome the weakness or intrinsic biases and the problems that come from single method, single-observer and single-theory studies. (Wikipedia)

__Observation__ looks at procedures, processes, products, interactions at a relatively micro level.

__Ethnography__ is macro level. It uses many methods inc. observation, to understand people in a social and cultural context.

It should be clear that a combination of qualitative and quantitative is ideal in many cases. But in qualitative too, you can use the strengths of one method to compensate for the weaknesses of another, to create more insightful and robust findings. You get a more rounded picture:

- About the individual: cognitive, emotional, behavioural, motivational, developmental
- How that individual is influenced by their environment, social groups, needs for conformity, power, affiliation and so on
- How individuals and social groups are influenced by culture that dictates the significance of behaviours, words and symbols.

This is a type of triangulation (see box).

The lack of context, awareness and memory biases in interviewing methods can be compensated by observation. Self-observation (diaries, auto-ethnography) and observation by researchers and others.

Alternately, observation can show situational influences, habits and interactions that the participant is not aware of, but you don't know the significance of it until you can discuss it.

Ethnography, which could include observation, interviews, surveys, and forms of cultural analysis, brings a broader social and cultural perspective to many research issues.

Standard interviewing methods put people in the role of 'respondents', 'informants', 'subjects' but workshops treat them as equals in a democratic process. Collaborative methods are less distorted by the agenda of the researcher or the client. They most effectively reflect the needs and wishes of those being consulted.

Observation and interviewing methods both rely on interpretation to make predictions about behaviour. Small scale experiments allow observation of actual behaviour and manipulation of influences. These don't feel very qualitative – yet the majority of the findings in social and cognitive psychology are based on small scale experiments.

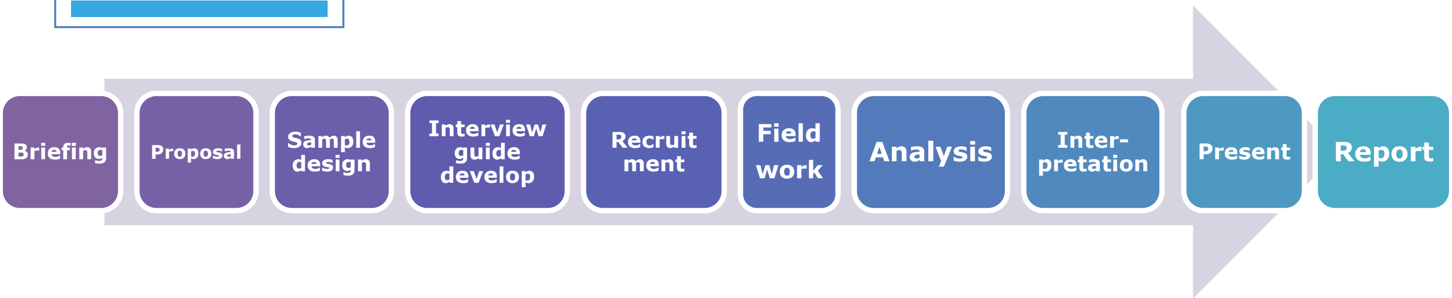
Even less qualitative in feel are some of the technological methods, such as eye tracking, galvanic skin response, and EEG (recording of brain activity using sensors attached to the scalp). Yet these also need to be correlated with subjective experience through interviewing methods to be useful.

Finally, the understanding of longitudinal processes such as some forms of decision making, lifestyle changes, development of work and political attitudes, benefits from a much longer relationship with the respondent. This can be cost effectively offered by online methods.

The research process

Do you need to read this section?

It will help you to question a brief, or write/evaluate a proposal.



27. Writing the brief

How to start

- Identify and define the problem clearly and accurately
- Identify the information needs
- Establish the end use to which this information will be put
- Decide how much should be invested to gather the information

How to examine a brief?

- Is the problem clearly defined? What assumptions, if any, have been made?
- Why is the research needed?
- Is it clear what the information needs are?

- Do I have all the information I need to design effective research?
- Are there any gaps in my knowledge about the problem?
- Are there any gaps in my knowledge about what the research is required to provide?
- If a research approach is suggested, is it feasible? Will it deliver what is needed?
- Are the research objectives clear and unambiguous?
- Are the research objectives relevant to the problem?
- Is it clear what the client expects from the research?
- Is it clear how the research will be used?
- Is the budget adequate?
- Is the time frame feasible?
- Are there any gaps in my knowledge about what the proposal should contain?

***Business** objectives are what the organisation needs to do and usually have a financial implication. **Research** objectives define what the research needs to find in order to inform that decision.*

28. Research proposals

Proposals demonstrate that you have a clear understanding of the problem, its context and the need for research. You aim to show that:

- You understand the problem and the issues involved
- The implications of the problem in research terms and in the wider business context
- You have the expertise to design, set up, manage and deliver good quality research for the decision-making process.

What should be in a proposal

Introduction and background	*A review of the problem in your own words, with additional information discovered*
Possibly a restatement of the business objectives	*How the research will help to make the necessary decisions*
Research objectives	*Review, add or edit*
Overview research design	*AND the rationale for it. Your red thread thinking.*
Methods	*Integrate with quant data? Mixed methods?*
Topic guide thoughts and possible techniques.	*Clarify hypotheses and explain how the guide will explore these. Also any pre and post tasks*
Stimulus material	*What you might need, why, and who will provide it*

Sample choice and size	*fieldwork details*
Quality control issues	*Steps you take to manage quality in your own and suppliers' processes*
Limitations / issues/ ethical issues	*Limitations of methods; samples, logistical problems, ethical issues. How to overcome them*
Analysis	*What data and what processes will be used*
Deliverables	*How will you feedback and present and to whom?*
Timetable	*Feasible and reasonable but fits with client needs*
Communication with client	*Frequency, portals, numbers*
Costs	*Executive time, fieldwork, studios, incentives, analysis, reporting, presenting, travel, contingencies –consultancy?*
Relevant previous experience	*Of the agency and project team*
Project team c.v.	*Personnel, staffing level*
Terms and conditions of business	*And a thank you for being asked to propose*

29. A 30-point checklist to assess a proposal

The problem and the research objectives

1. Does the proposal demonstrate a clear understanding of the problem?
2. Does it show a clear understanding of context and influences?
3. Is it clear about the decisions to be made based on the research?
4. Has the researcher included their own experience/thinking?
5. Are the research objectives and research questions clearly and correctly identified?
6. Has the researcher made any incorrect assumptions?
7. Does it challenge thinking where required?
8. Fit with organisational /company culture

The research design

9. Will the research design deliver the right kind of evidence?
10. Is there a solid & credible case of the approach suggested?
11. Are any limitations to this approach identified?
12. Will the data produced be credible?
13. Is the target population clearly and precisely identified?

14. Is a plausible case made for the proposed sampling strategy?
15. Is the sampling strategy appropriate to the research aims?
16. Is the method of data collection suitable?
17. Are any limitations of this method identified?
18. Have quality control issues been addressed?
19. To what standard is fieldwork conducted?
20. Is it clear how the data are to be analysed and presented?
21. Is any normative data available for comparison?
22. Has a framework for interpreting the findings been suggested?
23. Have ethical or legal issues been dealt with appropriately?

Timing and costs

24. Is the timetable feasible and does it fit with client needs?
25. Is the cost explained? Is it justified? Is it value for money?
26. Have contingencies been allowed for?

Experience

27. Do the researchers have the right level and kind of experience?
28. Is the staffing level appropriate?
29. Can the researcher/ team add value?
30. Is the proposal clearly set out, well written and easy to follow?

Qualitative Sample Design

You don't need to read this if you know how your research participants are chosen and recruited.

Sample size

Qualitative sampling is **purposive**, not nationally representative. It is led either by explicit theory, knowledge about the market, stakeholders etc., and by implicit assumptions about who would be helpful. Ideally the sample would be built as the research progresses; in practice, clients need to commit to a timeline and a budget.

To draw a purposive sample, a researcher begins with specific perspectives in mind that he or she wishes to examine and then seeks out research participants who cover that full range of perspectives. Therefore, the broader the range of respondents the larger the sample size.

As long as this happens to the satisfaction of all the stakeholders it is not necessary that the sample reflect the national distribution of respondent types.

Within a sample segment, it often takes only a small number of interviews before little new information is obtained. The point of saturation or redundancy can be reached after 8 -12 depth interviews or 3-4 groups.

30. Defining samples and screening

Make sure your definitions are realistic and can be found in real people, on the ground.

- Demographics - age, sex, socio-economic group (SEC), life stage, marital status, children at home etc.
- Geography - urban, rural, type of housing, etc.
- Behavioural variables, i.e. currently do X or Y v. don't do X or Y; or lapsed doers of X or Y
- Have experienced a particular situation
- From a segmentation (millennial mom, green millennial, hip-ennial, gadget guru, old school millennial etc.)
- Have made a complaint vs. non-complainers
- Attitudinal variables specific to the topic in hand i.e. loyalists v. rejectors, sufferers vs non-sufferers
- Psychographics / general attitudinal variables: experimentalists v. traditionalists, opinion leaders v. followers, etc.
- Customers/ category users who use competitors' products / prospects / experts / channel personnel - distributors, dealers, retailers / internal management

Quotas

It is common for qualitative research to use interlocking quotas with multiple variables. For example:

Region 1	Region 2
25-40	25-40
B C1	C2 D
Heavy users	Light users

Notice that if there are differences between the regions, you will need to disentangle regionality, socio-economic group (SEC) and usership as a possible cause. Qualitative analysis will help do that. Otherwise a quantitative survey will be needed to refine the resulting hypotheses. The alternative is a much larger sample with both sets of SEC and usership in each region.

Screening

The definitions become the basis of a screener questionnaire. It can be used face to face, by phone or online. (If its online, use another method to corroborate identity.)

To save people's time, immediately screen out people you definitely don't want:

- Consumers/users who work in the industry you're studying
- people who work in advertising, marketing, research, competitor companies, etc.
- professional respondents (who attend a lot of research)

Then identify the people you do want on a variety of demographic, behavioural and even psychographic criteria. The questionnaire is usually written in a survey style with closed questions and instructions to close if key criteria are not met. You need:

An opening paragraph that explains the research and motivates the potential participant to answer the screener (as well as attend the research). This might include

- Its independent research/ genuine, not a sales call
- In what way the research will be valuable
- A financial incentive (not necessarily the amount)

Use quantitative question writing skills to be sure you have:

- Identified the demographics clearly
- Used language that the audience will definitely understand. (For example, don't use the vaguer term 'motoring organisation' when you mean 'breakdown service'. Define 'chronic illness' or any terms that lay people may not be clear about.
- Define usage or behaviour criteria, ensuring participants are able to remember reasonably accurately. 'How many flights have you taken over the last 5 years?' might work for people who take one holiday abroad a year, but would get inaccurate estimates from those whose travel is both more frequent and irregular.

Be careful with questions where you need to identify the key decision-maker – use phrases like 'you yourself' to get a clear statement.

You can use agreement scales, 5 point scales – all the quantitative tools. Check out any non-standard questions by trying them out in a pilot study, otherwise the sample may be not exactly what you wanted.

Having identified the right respondents, you need to motivate them to attend – and start the process of informed consent.

You can see an example of a more complex recruitment questionnaire here: (Example). A more open-ended style can also work, and is less likely to give away the exact subject of the research. (Example)

Recruitment methods include convenience sampling in a place where good respondents could be found ('lurk and grab'), list sampling, and network or snowball sampling. Increasingly large panels and databases are being used for qualitative recruitment.

It is good practice to keep in touch with the recruiter or agency throughout the process. The main problems arise from clients asking for over-complex or impossible quotas – and also from respondents attending too frequently as an easy way to make money.

Qualitative Research Best Practice Rules and Guidelines

Recruitment checklist

Preparing for interviewing

Do you need to read this section? Yes, and especially if you think you have no biases. See Bias Blind Spot

Everyone needs to read sections 32 and 33 on biases and expectations. The close interpersonal situation of a depth interview readily allows for biases to be subtly communicated. Spending a bit longer on one concept than another, asking some questions in a less enthusiastic tone of voice, probing more deeply at some points – all of these will be 'read' by respondents as indicators of what the interviewer is really trying to find out.

The story of Clever Hans, a horse who could tap out with his hooves the correct answers to maths problems, is a more extreme example of this ability. He did it by detecting a release of tension in the face of the questioner, when he got to the right amount. If a horse can do it.....

...Much more is vested in the skill and expertise of the individual researcher than is the case in other more structured forms of research...' (MRS R&D sub-Committee, 1979:113)

31. Skills and qualities of a researcher/ interviewer

The key skills needed for the role include:

- Personal capacity for empathy, imagination, flexibility and creativity
- Sensitivity to body language and emotional signals
- Ability to become involved and yet remain detached
- Articulate but a strong listener
- Creative eliciting skills – and sensitive probing
- Intellectual ability and common sense
- Capacity for logical analysis
- Conceptual ability and eye for detail
- Think analytically yet tolerate disorder
- Verbal skills
- Confidence to handle verbal presentations
- Humour, stamina, patience,
- Being respectful and non-judgmental
- Not letting your own ego get in the way
- Keeping people focused on narrowly defined objective

32. Interviewer as the research instrument

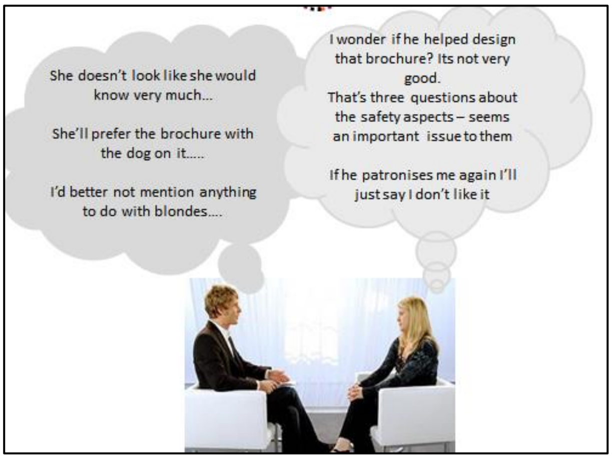
In qualitative research, the interviewer is the research instrument. This means you are part of the research (reflexivity) and can influence it for better or worse.

The interviewer will have a number of biases:

- Long term biases which are a result of upbringing, cultural socialisation, religion, values and beliefs, etc.
- More immediate biases which are assumptions, expectations and hopes for how the research might play out
- Cognitive biases common to all people – stereotyping, expectation and confirmation bias, selective perception, loss aversion etc.

"Even skilled interviewers convey more than they perhaps wish, by body language, that is non-verbal cues. The problems this can create – respondent resentment, distrust, posturing – are greater than those created by interviewers' misuse of verbal communication." Gordon and Robson, 1982

The respondent will share some cognitive biases, have expectations based on what they have been told about the research, and will usually want to present themselves as a rational, moral, reasonably intelligent person who makes good choices.



Respondents can be very sensitive to non-verbal cues, will be guessing the real purpose of the research, and may hold back or reveal, depending on their assessment of the situation.

The main routes to minimising bias

1. The interviewer becomes aware of, and manages his/ her own biases.
2. Use best practice in interviewing to remain neutral as an interviewer
3. Managing the power relationship
4. Good analysis procedures that take into account known biases.

33. Becoming aware of your biases

Using the red thread of thinking means you have to make explicit your hypotheses about the research.

The Implicit Association Test is a research technique that can access nonconscious biases. Follow the link above to access a large number of tests that you can take anonymously.

For longer term biases there is the process of Bracketing. It guides you through surfacing your prejudices and biases and then allows you to set them aside, as if in brackets (parentheses) when interviewing.

34. Power in the research relationship

Imbalances of power can make the issues of bias and influence worse. The imbalances go both ways:

- The interviewer can be older, more senior, and more confident than the respondent. In interviewing children and teenagers, the interviewer needs to minimise the power that comes from the role of adult.
- The respondent can be older, more senior, and more confident than the interviewer.

In reality, there are different forms of power base and even young and inexperienced interviewers have more power than they think. The following comes from French and Raven's analysis of sources of power:

- **Legitimate** – a formal right to make demands, and to expect others to be compliant. Legitimised by the organisation.
- **Reward** – the ability to reward others for compliance. Rewards can be financial, opportunities, praise or compliments.
- **Expert** – based on a person's high levels of skill and knowledge.
- **Referent** - the result of a person's perceived attractiveness, worthiness and right to others' respect. Celebrities, etc.
- **Coercive** – the ability to punish others for noncompliance.
- **Informational** – a person's ability to control the information that others need to accomplish something.

TIP – when faced with a more senior or intimidating respondent think, "You may know more about the subject than I do, but I know more about research interviewing than you do."

Whatever your job status, age and experience, you should feel yourself to be a professional equal. You will always have at your disposal at least three potential sources of influence and power.
You have some ***legitimate power*** in the management of the interview. It is ***your*** research project and you have negotiated a fee for their time. You have control in the form of ***expert power*** over the interview process and agenda.
You can also give ***praise*** in the form of feedback, smiles and attention - and punishment by withdrawing them.

Social researchers give consideration to other forms of power – namely the cultural and social contexts. The assumptions of gender, ethnicity, social position etc. may need to be challenged using specific approaches to give authentic voice to the marginalised.

Interpersonal relationship skills

Every interview takes place in the context of a relationship, even a very short one. It is the interviewer's role to build and shape the relationship with the respondent. This is done by:

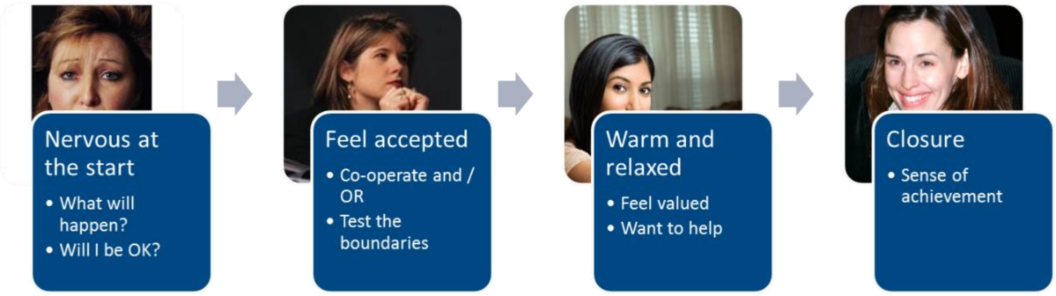
- Understanding respondent needs at different stages of the interview
- Managing the process of the interview as well as the content
- Using research introductions effectively
- Building rapport and empathy
- Using emotional intelligence, being professional and polite.

Developing the relationship is like learning to dance with a stranger. You have to get to know each other's style and moves, and after a few missed steps you can move around the room in step.

35. Building the research relationship

When respondents arrive for an interview, they may be: curious, cautious, and slightly anxious (will they have the answers?), possibly intimidated by the setting – as well as looking forward to giving their opinions.

As you chat, they will build confidence in the interviewer (possibly throwing in a couple of 'tests' along the way) and then will reveal some of their more private thoughts and feelings when there is reasonable trust.



The stages of an interview work to fulfil both interviewers' and respondents' needs.

Stage	How respondent is feeling	Interviewer's task CONTENT	Interviewer's task PROCESS
Interviewer's introduction	*Curious but insecure – this is the unknown*	*To explain the purpose of the research, take care of formalities*	*Make respondent feel welcome and comfortable through explanation*
Respondent's introduction	*OK to answer simple questions about themselves*	*To obtain basic information about the respondent*	*To develop a strategy for creating rapport by observing respondent*
Warm up discussion	*Starting to feel accepted and interested but still cautious*	*Get context for understanding*	*To foster* ***Inclusion:*** *Recognition, attention, involvement, acceptance*
Focusing into the subject	*Feel more confident – may test the boundaries of the interview*	*To start exploring the basic issues in the research*	*Interviewer needs* ***control*** *of the process, respondent control of the content.*
Key issue exploration	*Rapport created by the interviewer has built trust.*	*The tricky topics Deeper probing Use of techniques*	***Openness****: empathy, warmth, co-operation, dropping of personal defence mechanisms and impression management*
Summary and close	*Should feel listened to and comfortable*	*To acknowledge the respondent's contribution and check own understanding*	*To break rapport and signal the interview is over.*

This particular model of the process is based on the Firo B.

There are a number of models that share a similar pattern. It is not important whether you choose to subscribe to any particular one; what matters is the recognition that there are different stages and that the interviewer needs to do different things at different times.

36. The power of a good introduction

The very first impression you create matters. Aim for warm and competent.

What do people subconsciously think when they meet someone new?

According to Fiske et al[7], the very first judgment is an evolutionarily based one: is this person a friend or foe? There are two dimensions:

1. Warmth – degree of friendliness indicating their intentions.
2. Competence – how able are they to enact those intentions?

At the start, there is always a power imbalance. The interviewer has knowledge power – knowing what will happen. The respondent does not, so they will listen very carefully. The introduction is more than just a warm up and exchange of information:

Write your introduction in bullet points so you can easily adapt it for different people. Remember that the way you say it almost as important as what you say.

- It's an explicit and implicit 'contract'. You agree to reward the respondent; they agree to give you information.
- The structure & form of the introduction reassures about content and expected behaviour. The way you deliver the introduction and the language you use indicates the degree of formality, the acceptability of jokes and other verbal behaviour.
- You can set up expectations of exercises and other tasks so they do not come as a surprise.
- In a group, the introduction explicitly works against consensus: you emphasise you need their personal opinion
- It helps manage potentially difficult respondents. Give yourself permission to interrupt and move people on, if required.
- It gives respondents permission - to disagree, to be silly, to be creative – whatever you need. It sets the tone.

[7] Universal dimensions of social cognition: warmth and competence Susan T. Fiske, Amy J.C. Cuddy and Peter Glick

- It sets out obligations to your 'partners in enquiry' – you will keep to time, they don't have to answer, you will keep the information confidential and so on.

And the introduction can be used to repeat the assurances made at recruitment relevant to the Code of Conduct and Data Protection.
So, although it is quick and routine, it is still a powerful psychological communication.

See the video:
https://www.youtube.com/watch?v=iyEbuWLLiII

Psychology of a good introduction	What you actually say
Sound friendly, warm and competent	**Welcome and thanks**
Respondents feel more comfortable as they know more	**Introduce yourself, company, explain purpose of research**
It's OK to criticise, you won't hurt anyone's feelings	**Independent researcher***
Feel protected, empowered	**Code of Conduct, anonymity, right to withdraw**
*Reason for recording or viewing ***	**Your information is very valuable to us and the detail is useful**
Set expectations of free interaction	**'Chatting' (informal), doing exercises**
It's not a test, researcher is non-judgmental	**No right or wrong answers**
Not others' views or the company message	**Your own personal views matter**
You can relax. The researcher is expert in process management	**Interviewer's job is to ask questions, manage time, move on if necessary**
Set an appropriate tone for the subject	**Be serious / be creative / be collaborative – whatever you need**
Change norms of conversation	**Model the language to be used**
We will look after all your needs	**Housekeeping issues, refreshments, etc.**

*If you can't claim to be an independent researcher, then change the statement to show that you have no direct interest in what is being researched. You didn't design it; you are from a different team –anything you can honestly say to show you won't be offended if they don't like it.

** According to the Code, clients who are observing must be presented as such. If that knowledge would adversely affect the interview, the respondent may be told at a later stage. If there is a chance the observer and participant may know each other (as in business to business research), the participant must be told before the interview and given a chance to withdraw.

After this introduction, some interviewers ask if there are any questions, then ask the respondent to give some information about themselves.

37. Working with 'difficult' people and situations

These are likely to fall into two main groups

1. The people who talk too much: generally over-talkative, soapboxers, cynics and know-it-alls. The key issue here is keeping them on topic.
2. Those who don't say enough (shy, withdrawn, passive, don't care). The issue here is to get enough information from them.

Keeping people on track

It helps to diagnose why they talk as much as they do. Some people are naturally long-winded or feel they will not be listened to unless they give long explanations.
Learn to **interrupt politely.** Stop nodding and maintaining eye contact.
Use the **respondent's name** to break through their monologue.
Summarise and/or value their views before you move them on.

"Adam! Sorry to interrupt you. I have taken three main points from what you just said; late running of trains affects more people than just the passengers; the lack of information is a key problem; and passengers become stressed and angry. AND can I just bring you back to commenting on this online timetable…"

"What you have said about the problems of transparent dressings is very interesting, <u>and</u> now can you tell me your views on the best treatment for postoperative wound care…"

Notice the use of the word '**and'**. If you say 'but', that discounts the positive statement.

Remind them of the task
"My interview guide says we need to be discussing the advertising at this point, so we will have to move on…"

The same strategies work with Know It Alls.
They are likely to need validation or respect, so acknowledging their expertise meets that need, before you redirect them back to the subject.
"I can see you know a great deal about non-parametric statistics, and as we have about ten minutes left, can we move on to this idea for a new journal?"

Persistent Cynics need to be gently challenged:
"What is the positive side of this?"
"What is the serious side of this?"
"Do you really mean that nobody ever buys anything as a result of advertising?"

If you suspect they are playing a role, or have dug themselves into a hole, bring in different opinions from 'other people' to give them a chance to get out of the position they have adopted:

"I've spoken to other people who have had a whole range of different reactions. Can you see how there might be something positive in the idea?"
Use this carefully and only in cases where you suspect the initial reaction is not authentic.

Those who don't say enough

It helps to think about the reason why they are so quiet. They may be shy, apprehensive, find it hard to express themselves, or perhaps feel they don't have much to contribute. The behaviour which elicits more responses from such an interviewee:

- talk less
- ask all open-ended questions
- spend more time on subjects of interest to the respondent
- reward the things he/she says
- emphasise that his/her opinions are valuable

It makes for a very quiet interview, and extrovert interviewers will initially find it painful, but talking less and leaving long silences often produces answers of greater quality. If you can, give them alternative methods of expression such as drawing or writing, moving sticky notes around, or get them involved in stimulus material.

Sensitive /emotional issues

As an interviewer, you have to learn your emotional triggers and be clear that you won't get upset. Choose appropriate terminology for the subject and use it in the introduction. This sets the frame for discussion. Best practice in interviewing will lead to a sensitive interview; after all it is based on a therapeutic approach. If the respondent does become upset, ask if they want some time out, and let them indicate when and if they are ready to proceed.

It is the interviewer's responsibility to handle all of these situations. They cannot be ignored, just because the interviewer does not wish to appear rude or has a need to be liked.

38. Building rapport

Rapport is meeting other people in their model of the world, and is built by

- Taking a genuine interest in the other person
- By being curious about who they are and how they think
- By being willing to see the world from their point of view

People misleadingly talk about achieving rapport as if it was a state, but in fact it is a process involving different stages and degrees of rapport. It is like a thermometer, with a hot and cold measure at the two ends:

Seduction - hot
Cosily warm
Warm
Identification
Understanding
Lukewarm
Cool
Cold

Throughout an interview levels of rapport may vary, and it is possible to use both body language and verbal skills to control the level of rapport.

People feel comfortable with others who are like them, so some of the basic techniques are to use similar language, tone of voice, and body postures.

Mirroring and matching has to be natural and subtle. Most people do it without thinking, but you can practise it consciously.

Rapport building exercise

NOT during an interview, but in a social situation (even a quick chat by the water cooler) make a conscious effort to adopt the same overall style and shape of body language. No need to copy exactly.

Speak at the same speed as the other person and pick up one or two key words or phrases they use. This will increase your state of rapport – notice how it feels.
Then break rapport by changing your position and your voice. Notice what happens. You can do this as a more formal exercise with a friend or a colleague.

At more advanced levels you can build rapport by matching much smaller movements, such as breathing or blink rates. Skills from NLP (Neuro-Linguistic Programming) will add to your ability to build rapport quickly and effectively.

Best practice in Interviewing

39. The psychological principles underlying interviewing

The key principles are: empathy, genuineness and being non-judgmental.

These come from the work of Carl Rogers, an influential psychotherapist and founder of Person Centred Psychology. Qualitative interviewing is also Person Centred – it values the respondent and their experience. Rogers analysed the factors that influenced the interviewing situation and found that a positive outcome was related to three main factors:

Empathy

"…..Empathy requires the much more complex and delicate process of stepping into another person's shoes, and seeing the world through his or her eyes without, however, losing touch with ones' own reality". (Mearns & Thorne, 1988)

Empathy is not sympathy or pity. It is important that the empathy is accurate, and that it is communicated to the respondent. Some of the benefits of empathic listening are lost if the respondent is unaware of how tuned in the interviewer is. Most qualitative market research aims for two levels of empathy:

- Showing an understanding and acceptance of the feelings and thoughts that have been expressed.

- Showing an understanding of the respondent that is just outside their immediate awareness. An interpretation, a re-phrasing, which comes across an insight or a crystallisation of how they were feeling. This interpretation should be checked out with the respondent before being attributed to them.

Empathy is closely linked to rapport. Both require observation of body language, getting 'in tune' with the respondent's feelings, and a willingness to see from the respondent's perspective.

Simply put, this means BE YOURSELF when interviewing. Don't copy anyone else or try to act differently. You will model genuineness and transparency for the respondent.

Genuineness

Genuineness is about knowing oneself and reacting to others in an authentic way. For the person-centred counsellor, this is a life-long journey. For the qualitative market researcher, it is more likely to mean a willingness to drop a professional front or a personal façade. The interviewer who is able to say, *'I don't know how to ask you this'* or '*I am feeling a bit confused*' will achieve a more constructive result than the one who tries to maintain the illusion of perfection.

Note that being genuine may conflict with being non-judgmental. You may be genuinely surprised or shocked at what people tell you, and it will show. If you have learnt not to comment with your personal opinions, the participant is likely to see it as am empathic reaction, especially if you cultivate an attitude of acceptance. See next paragraph.

Acceptance: avoid the common judgemental mistake of identifying people with their behaviour: ('he acted in a selfish way; therefore, he is a selfish person').

Being non-judgmental/ acceptance

Or as Rogers called it, *Unconditional Positive Regard*. This creates the trust and respect that enables the building of a relationship.

- Avoid making comments and jokes that might unwittingly denigrate or offend.
- It can be hard when the researcher feels they don't like the respondent. Deal with it by separating the behaviour from the person – they may admit to having behaved badly, but that does not mean they are a bad person.

This does not mean you can let people walk all over you. Very occasionally you will meet people whose attitudes or behaviour are totally unacceptable, and you will have to say so and terminate the interview.

The concept of **emotional intelligence (EQ)** was popularised by Daniel Goleman in the 1990s. Goleman argued that it was not IQ that guaranteed business success but emotional intelligence. He described emotionally intelligent people as:

- Good at understanding their own emotions (self-awareness)
- Good at managing their emotions (self-management)
- Empathetic to the emotional drives of others (social awareness)
- Good at handling other people's emotions (social skills)

If you take the listed skills and qualities of a researcher and combine them with empathy, genuineness and being non-judgmental you cover off all the bases of EQ.   If you are curious, you can take a short version of an EQ test here.

40. Using these principles in interviewing practice

Interviewers are encouraged not to give information about themselves, make personal comments, and certainly never give their opinions on the research subject. Although it makes the interview one-sided, it avoids the danger of sounding judgmental.

The introduction to the interview is a good opportunity to show how much you value and respect the respondent and their opinions.

Qualitative market research is rarely truly non-directive, but once a topic has been established, interviewers use open questions that allow the respondent to discuss what matters to them.

"Moving on to your experience of the service in the hotel, can you tell me what that was like?"
"Can you describe what happened as you were going through airport security?"
"You said you feel a bit tired and stressed and you need a holiday. What are your priorities in choosing one?"

Open questions, paraphrasing and probes make the respondent stay as the central focus. (Whereas closed questions tend to give away the research agenda).

Interviewers pick up and use the respondent's terminology, where possible, to build empathy and rapport. Marketing jargon should be avoided.

Listening is active. The interviewer becomes aware of what is being implied, what emotions may be under the surface, even what is not being said. Remembering what the respondent said earlier is very powerful. Summaries and paraphrases make respondents feel truly listened to and understood.

Stimulus material is used to present new information, avoiding biases which might occur when the interviewer has to explain something.

The position you are aiming for is **Empathically Neutral.**

You can be warm in process – noticing and reacting to feelings, using their language, being in tune with the body language

But neutral in content – not giving away your own interests, opinions, using open questions and stimulus material to introduce ideas for you.

41. Focus your attention outward

Be truly present. Connect with the respondent. It's more important than technique.

When you are starting out, it is impossible to remember all the advice. Are you giving off the right body language? Being unconsciously leading? Summarising often enough? What is the next question?
The tendency is to become internally focused, or to bury yourself in the guide. Any flaws in your interviewing can be quickly forgiven if you focus your attention fully outward onto the respondent.

- Keep the right amount of eye contact
- Be curious as to what they are thinking and feeling
- Listen actively

When you focus and listen like this, the respondent will feel really heard and valued, and you will feel a connection with them. The technique will come in time.

Interviewing Skills

42. General guidelines

Remember that you already know how to: build rapport, ask questions, follow and lead a conversation, you have been talking to people your whole life. The training simply makes you more aware of what you do and allows you to make better choices.

Interviewers use different styles, different combinations of skills and techniques, but as long as you are **authentic and natural** you will model this for respondents. So BE YOURSELF when you interview. Borrow questions from others but ask them in your own style.

In most cases it's appropriate to keep it natural and conversational. Ask simple questions and only one at a time. Wait for an answer. Respondents need thinking time. Don't jump in with another question. **Learn to LOVE SILENCE**.

If you truly have framed a poor question, acknowledge and rephrase it. Respondents struggle with some answers; it is reassuring that the interviewer also has difficulties. It's an art, not a science.

43. Types of eliciting skills

The word 'eliciting' is more appropriate than 'questioning', because you can get respondents to talk without always asking questions. However, you do have to be aware of the basics too:

Open and closed questions

Open Questions: Who? What? Why? When? Where? How?

Open questions invite the respondent to describe an external or internal situation, and encourage people to talk.
"Who has been most influential in your choice of a career?"
"How do you make up your mind when there are 6 packs that all look similar?"
"Where do you go when you need a break from work?"
"Why do you listen to news programmes?"
"What does the station have in terms of what you need?"

WHY can be interrogative, so embed it – soften it by putting it into a sentence *"I wonder why…"*
Open questions can be main questions and follow-up questions. You can start a topic: *"When did you decide you needed a new car?"*
And then follow up with questions about what happened, actions taken etc.

Closed Questions: Closed questions can elicit just a yes/no answer, although in practice some people will give an open answer. They usually begin with the words

'Is', 'Are', 'Do', 'Did?' 'Has?' 'Was'

They usually elicit information & establish facts. They are useful.

"Is there are regular commute?"

"Did you always want to be a teacher?"

"Are you ready to do something new?"

"Was it a snowy Christmas?"

They retain control with the questioner, so they can also close people down by not giving them a chance to elaborate. You will find yourself using them more if you are in a rush. You need both open and closed questions in interviewing and to be aware of which type you are using.

It is possible for respondents to answer closed and leading questions in an open way. Especially if a good rapport has been established. So the ultimate definition of a leading question is whether the respondent feels they have been led.

One danger of closed questions is that they easily become **leading -** because the desired answer is implied in the question:

"Do you think you'd shop there more often if the prices were lower?"

"Are you concerned about the all the empty shops on the High Street?"

"Were you happy with the information the financial advisor *gave you?"*

"Do long forms on a website put you off signing up?"

"Was it a mid-life crisis that made you leave your job?"

EXERCISE: Turn the above leading questions into open ones

E.g. How would you feel about shopping there if the prices were lower?

Probes and Prompts

The interview is less like an interrogation if you use **probes,** which can also provide a more indirect form of questioning, as well as asking for more information.

"Tell me more about...."	*"Can you elaborate.............?"*
"I wonder what....."	*"And?"*
"Would you explain more…?"	*"Can you give me an example?"*
"What else is there…?"	*"Can you describe that for me?"*
"What makes you say that?"	*"What specifically interests you"?*

Be aware that there is a difference between '*what else?*' which implies there is something else, and '*Anything else?*' which implies there might not be.

Prompts can also help respondents remember and say more:
"You said you had considered Citroen and Peugeot – what about Ford, Vauxhall, Fiat, Mini – any of those brands?"

Paraphrasing, Echoing and Reflecting

To **paraphrase**, repeat in your own words what the person has been saying. It makes the respondents feel understood and encourages them to talk more.

"You said a couple of times you don't want to be late. It sounds like it's important for you to be on time?"

"You're saying…."	*"In other words..."*
"What I'm hearing is..."	*"The picture I'm getting is..."*

You can also **echo** back the respondent's words with a questioning tone of voice, (not too often or you begin to sound like a parrot). Echoing is useful when people use words that are quite strong or unusual in relation to the situation:

*R: "If you are **faffing** around with your ticket…"*	*I: "Faffing?"*
*R: "I am **addicted** to Krispy Kreme doughnuts"*	*I: "Addicted?"*
*R: "That outfit was **hideous!**"*	*I: "Hideous?"*

Reflecting concentrates on the <u>feelings</u> within a statement, and depends on <u>empathic</u> understanding. Empathy is feeling <u>with</u> the other person, *as if* you were the other person. Being able to reflect *feelings* involves viewing the world from the respondent's frame of reference; what his thoughts, feelings and behaviours mean to him.
A reflection is an interpretation of the respondent's emotional state and it is important to offer it back to them so they can confirm or deny it.

"So having your ticket ready is about being organized, but is it also perhaps about not getting in the way of other commuters?"
"I'm picking up some disappointment in your voice. Is that how you are feeling?"
"You sounded as if you felt quite relieved to finally get what you needed?"

Challenging and clarifying

People are quite likely to contradict themselves as they explore their feelings and attitudes about a subject. When this happens, challenge gently by owning the confusion yourself.
"I'm confused; earlier you said you had no interest, but now you seem to be saying you would consider one?"

Interviewers can spend a lot of time **clarifying**.
'When you say……what do you mean by….?'

It may be necessary to clarify the usage of certain words, or to analyse entire concepts.
'So what specifically would 'good service' mean to you?'

Another way to do this would be to ask for specific examples. It's important to clarify when you have received slightly conflicting information:
"On the one hand, you are watching the clock before you leave, but on the other, you prefer to walk slowly?"

Summarising

This can focus, prompt, close the conversation on a particular theme, unstick a conversation, provide a platform to view the way ahead, help the respondent to see another perspective. It helps the researcher remember too, and to move onto another topic. You can ask the respondent if they agree with your summary.
Summaries allow the interviewer to check they understand correctly and also make the respondent feel listened to and understood.

Deep Dives

Instead of asking a series of direct questions, use probes to get more detail on the information you already have got, e.g.,

"Can you tell me more about that?"
"If I could get inside your head….."
"What kind of (feeling/ experience) ….was it?"
"Is it like anything else you have come across before?"
"How important is that to you?"
"What were your feelings when that happened?"

Other questioning strategies

Significance *"How important to you is ....?"*
Hypothetical *"If you could……"*
Ideal situation *"In a perfect world….."*
Devil's advocate "*To put the opposite view for a moment…"*
Provocative *"I've heard people say…"*
Compare/contrast *"Which would you group together and why*?"
Specifics *"What do you see, hear and feel when you are* happy?"
Examples *"Can you give me an example of…?"*
Narratives *"Tell me the story of the day you …"*
What's missing *"I notice you haven't mentioned…"*
Summary questions *"Taking all the factors into account..."*

Notice that with Devil's Advocate, you move out of your neutral interviewer mode, but it's OK because you say you are going to do it.

Narrative questions are particularly useful at the start of an interview. They signal that you want to hear a story and participants will talk more and give more details that if you are being very specific.
"Tell me about getting to the station….."
"What was the story behind that choice?"
"How did you come to be in that situation?"

Laddering into higher levels

The question "why is that important to you? is particularly powerful when used two or three times in sequence.

R: I have got to have a least a small heel when I buy shoes.
I: Why is that important to you?
R: Because I am not very tall and it helps me look people in the eye.
I: And why is that important to you?
R: Because I feel more confident and people don't patronise me.

This question enables you to quickly move from attributes to benefits. It is the basis of a formal, individual technique called Laddering, but can be used in a depth or a group context.

Repeat receipts

These are all the things interviewers say to show they are listening. These include variations on the classic *"Uhmm*" which is neutral. Others are: *"sure" "yes" "OK",* which commonly mean *"I'm listening"* during an interview, especially when accompanied by nodding.

Some interviewers will say: *"That's great" "wonderful"" really interesting"* and so on. These also act as rewards and encouragements, so they have to be used with conscious awareness. Random usage will encourage respondents to stray from the topic. You may end up 'rewarding' comments and behaviours that are not useful in the interview situation.

Paralinguistics are the aspects of spoken communication that do not involve words. These may add emphasis or shades of meaning to what people say. Gestures, facial expressions, tone and pitch of voice are all examples of paralinguistic features.

Watch this short video and see how many interviewing mistakes you can spot.

44. Listening skills

Think of active listening as: ***'Listening to the music as well as the words'.***

Listening is a form of selective translation. It is selective because the interviewer has to choose to listen in the first place, and may listen to only parts of what the respondent is saying. Many blocks to listening can get in the way. The listener may hear mainly what he or she wants to hear – a very good reason for listening to tapes or reading transcripts afterwards. The listener puts the meaning into his or her own frame of reference, sometimes unconsciously substituting concepts with slightly different meanings.

It is hard to listen when the significance and meaning of the words is not clear. Technical words or regional sayings need to be clarified and understood at the start.

A degree of respect for the speaker is required. Other blocks to listening include:

- Making comparisons or even identifying with the respondent,
- Labelling,
- Rehearsing the next question,
- Filtering out 'boring' bits,
- Offering advice,
- Joking off or sparring,
- Correcting or advising the respondent,
- Worrying about being liked

All these blocks happen when the interviewer's own thoughts and concerns intrude. That is part of the reason why focusing outward on the respondent is so helpful.

Listening exercise: Listener and talker.

1. Talker has to describe what they want from a holiday but without mentioning a destination. Listener has to practice active listening skills – listening attentively to what is being said and what is not quite being said.
2. After 3-4 mins the listener has to summarise the three or four main issues or criteria that they have heard the talker express and then make a guess of a suitable destination.
3. Take one minute to review how close the listener was to what the talker said and needed. Then swap roles and repeat.

See Appendix for a depth interviewing feedback form and a listening skills checklist

45. Emergent interviewing

Most of the time the interviewer has a good sense of what questions to ask next, but sometimes you have to stop, listen, and make up questions based on what the respondent is saying.
This means you cannot put down all the questions in advance.
This is called emergent interviewing and it is a very important skill.

It's an integration of eliciting and listening that allows you to stay in the world of the respondent. That increases rapport and empathy, brings new insights and makes the research more robust. It allows the respondent to shape the research according to their own worldview and helps challenge any incorrect assumptions held by the researcher.

1. You are listening carefully to the respondent – noting what might be significant, emotional, what lies beyond the words.
2. You frame a question to explore what you have been hearing
3. You listen closely again to the answer
4. You frame another question to explore that.

It can be described as a virtuous circle, although it is more of a spiral as it progresses your understanding.
You don't have to do it all the time, but at critical points it's fantastically useful. Notice that it will not be in the topic guide.

Writing a topic guide

In semi-structured interviews it is common to use a *guide* rather than a ‘script’. This helps the research remain open and flexible; based in the experience and needs of the respondent. It can then be truly emergent.

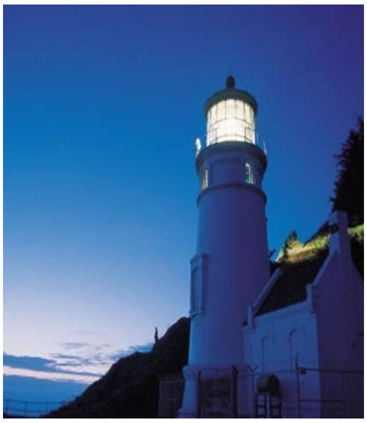
46. The role of the discussion or topic guide

At the planning stage of the research, the topic or content guide is a very important document.

- It is a practical framework that delineates the boundaries of the research – what is to be excluded or included.
- It’s a forum for the formulation and exploration of hypotheses.
- It demonstrates to the client that the interviewer has understood all the issues and will not leave anything out. (So it can become overlong and detailed.)

Sometimes the guide is passed round all interested parties and everyone throws something in. This is the skip theory of guide development.

Client guide



Researcher’s guiding light

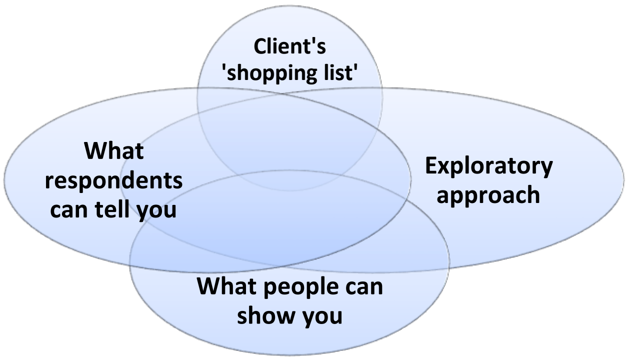
- A long and detailed guide is not practical to use in an interview. It is inflexible, draws focus away from the respondent, and interferes with building the research relationship.
- What the researcher needs is closer to a ‘guiding light’. An overall direction, key steps along the way, but flexibility in question construction, order and timing.

If you have to adapt an overlong guide, chunk it into topics, rewrite it into bullet points, and use lists of probes rather than full questions. **Check with the client as to what is essential and what is nice to know.** Explain you need some flexibility in order to manage the research relationship and explore new ideas. The process of rewriting will help you internalise it.

47. How to write a guide

Go back to the research objectives, your hypotheses and theories. Clients sometimes treat the guide as a shopping list – "we want to know X, Y and Z about how people buy coffee." But its more useful to think of it as a **guide to a journey –** into the land of coffee usage. This will give you creativity, flow and open-ness to new discoveries.

You can start with the shopping list of questions. But if you don't reframe these you will end up asking direct questions, as in the quantitative model – which will make for a poor, and short, qualitative interview. Think about what respondents can and can't tell you, - and other ways of eliciting that information.



1. **Take an exploratory approach.** Instead of asking "what are your attitudes to paying tax?" (Which will give you a socially acceptable answer) get participants to talk about closely allied subjects, such as their interactions with the tax office, how they feel when looking at their payslip and so on.

2. **Step into participants' shoes**. What can you reasonably expect them to remember or describe? How much self-insight might they have? When may you have to get them to stop and focus, use a technique to elicit more detail, show them some stimulus material for further exploration?

3. Remember that qualitative research can **access things people didn't know they knew** – or felt. Include visual exercises and projective techniques – and allow enough time to explore the new information they generate.

4. If it's important to assess spontaneous reactions to something, make sure they will not be contaminated by anything said earlier. Watch out for order effects, and bear in mind the different stages of an interview.

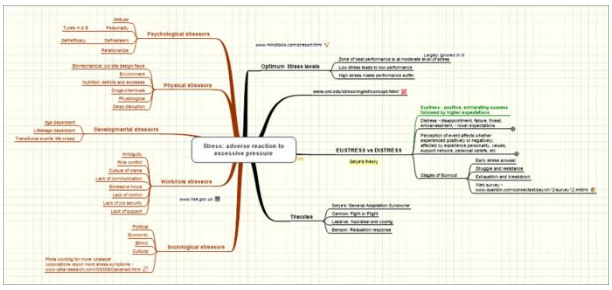
5. Use open questions, list the prompts for the topics you want cover, leave space and time to explore emergent information. Make it usable, so you don't have to spend the whole interview referring to detailed questions. It's a GUIDE, not a questionnaire.

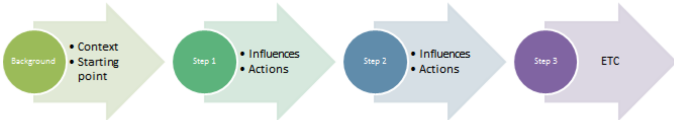
The structure of a guide

The most common structure is like a funnel

- The introduction helps to reassure the respondent and set the boundaries of the interview.
- The warm up consists of easy questions designed to build the respondent's confidence and engage their interest.
- Then there can be an exploratory stage where relevant themes and ideas are examined
- The guide starts to focus into the key subject areas. By this time the relationship should be one of empathy and trust, leading to easy disclosure.
- Once discussion of the key subjects is finished there should be a period of reflection and summarising, and a good close to the interview.

Note that in other cases guides can be structured to follow a longitudinal process or as a mind map.





How to come up with topics for the guide

Operationalising

A variable or a concept is operationalised when it is turned into something that can be meaningfully discussed (and/or measured). Ask "how will we see/know when…."

- Operationalise hypotheses and theories
- Define 'fat words'
- Ensure you have context
- Do you need to cover the rational, emotional, social and cultural?
- Brainstorm what else is relevant
- Step into client's shoes
- Step into participants' shoes

Operationalising turns big ideas or vague concepts in questions that can be understood and answered.
Example: You are researching employees who are striking because they disagree with management over working practices. You have a theory that collective narcissism is increasing sensitivity to perceived slights, and blocking negotiations. You cannot ask "are you influenced by collective narcissism?" You have to break down the concept into elements that can be probed and discussed such as:
Feelings that the workers deserve special treatment and respect, they could run the company better than the management, etc. These can become questions or discussion topics.

Check the brief for 'fat' words, that might be interpreted differently by different people. What do they mean by 'progress' or 'success'? How can you tell if someone is 'engaged' with a communication or not?

Make sure you have enough background information to understand people's motives for saying things. What are the relevant influences?

Remember that qualitative research can cover the rational, emotional, interpersonal/social and cultural and make sure you have questions from the relevant domains. For example, a common objective is to discover 'attitudes'. They can come from:

- Cultural rules and traditions
- Social groups we belong to or aspire to
- Biological and psychological needs

Ask other people – you will get different points of view.

Check the guide from the client's perspective – are you really going to help them answer the research question?

Click here for a useful list of common topics.

Building in techniques and stimulus material

1. Some techniques act as thinking tools, helping respondents clarify, deepen and explain their attitudes and opinions. These might include word association, mapping, various ordering and sorting procedures, putting things into order of priority, drawing out choice processes, etc.

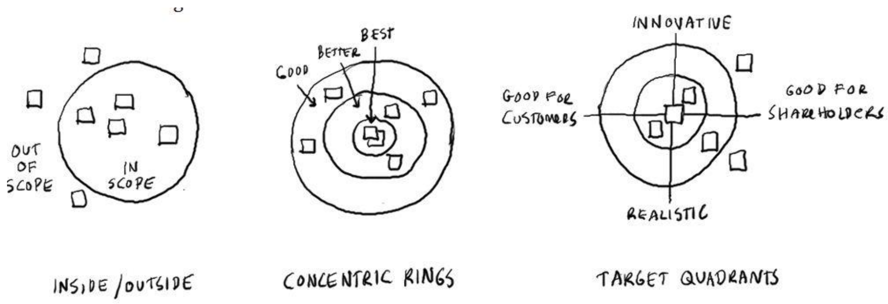
2. Stimulus material introduces new information (or reminds of existing information) and helps keep researcher neutrality. It literally stimulates both thinking and energy.

3. The introduction of tools and techniques helps change the energy and stops respondents becoming bored and over-rational by talking too much.

Leave enough time in the guide to explore the implications of any techniques you use. This will help in analysis, since you will already have some well-grounded interpretations of the significance. Attention spans vary with the person and the subject, but there is no harm in aiming to do something different every 20 mins or so – a change of topic, an exercise, some stimulus material.

Simple techniques for keeping engagement and energy

In a depth interview, you can do a great deal with sticky notes. Get the respondent to write down criteria, positives, negatives and so on, one per note, and then order or sort them on the desk. Images are from Gamestorming, a great book about visual thinking.



Have relevant stimulus material: packs, brochures, websites, pictures of settings or users – they make the interview less abstract and the issues easier to talk about.

Change your own pace and tone of interviewing. Where appropriate, be slower, more focused; at other times, speed up and be more lively.

Topic guide template (overpage)

This will help structure your thinking if you are just starting to write guides. Instead of writing out lots of individual questions in full, write headings and prompts.

NOT:

"What is the first thing that comes to mind when you look at this?"

"What would you say is the main idea being expressed?"

"How do you relate to what is being said?"

"How true does it feel to you?"

BUT:

Concept	– immediate reaction
	-understanding /benefit
	- relevance
	-credibility

- You can practice writing bullet point topics in column 2
- You can write more detailed questions and prompts in column 3
- Always have a rationale for what you do
- The timing of each section will vary according the project.

1. Stage	2. What is written in the guide	3. What you say/ ask	4. Rationale
Researcher's introduction:	Welcome, name and role Purpose of research Your views are important. No right or wrong answers Ideas come from someone else Code of Conduct Anonymity Right to leave Recording and data protection Refreshments and loos etc.		Emphasise independent. Sound warm and friendly. Get people on board with the objectives. 'Chat 'is less formal than 'interview' It's about understanding & experience rather than knowledge. Not a test, researcher is interested in YOU It's OK to criticise. Reassurance and safety Voluntary participation Data protection check Housekeeping – and looking after the respondent.
Respondents' introduction:	First name, two things about yourself		Easy questions about themselves, work, etc. Relevant background.
Warm up session to get an understanding of context	Add your own topics here You can include techniques like mapping here to review the market		Start with behaviour. Ask narrative? to get them into descriptive mode. Use the same language for rapport Follow up on key words to build understanding

Exploratory stage – getting deeper into the subject	Questions like Tell me about… What comes to mind when… Use stimulus material to help people remember experiences and details		Get an understanding of relevant experience What do the key concepts mean to the respondent? Elicit the respondent's criteria for judgment.
Key Issue – how context and general principles impact on the specific business issue	More prompts, probes, questions about specific aspects Deep dives Stimulus to explore new concepts or get people to create expressions		Use stimulus material if required Aim to understand how this fits with previous attitudes and feelings expressed. Unpack meanings Use projectives if people need help to surface feelings
Review and summarise	What have we learnt here? What are the implications? Why is this important (to the respondent, client)?		Time to check your understanding of the respondent Link features and end benefits Helps respondent identify their priorities Signals the interview is about to end.
Close		Is there anything you would like to say that you have not had a chance to say? Thank you, that is very useful	Look grateful Confirm the value of the interview

Unlike quantitative questionnaires, topic guides can be iterative. As you get ideas and hypotheses from earlier interviews they can be put into later ones. This makes the research more robust by checking your understanding of the issues as you go.

Topic guide Checklist

- Will it fully meet the objectives?
- Does it examine all relevant angles?
- Does your introduction address any concerns the respondent might have?
- What kind of mood do you want to aim for, and how will you create it?
- Is it in appropriate language?
- Is it realistic in terms of what respondents will know or be able to remember? Have you techniques to help with this?
- Does it get spontaneous awareness early (if required)?
- Have you got all the context required for understanding?
- What topics might be considered private and how can you encourage disclosure?
- Does it allow for the build-up of a trusting relationship before exploring the key issues?
- Have you included enough time for stimulus and/or techniques?
- Does it follow a flow? Change energy to keep engagement? Or are parts repetitive and boring?
- Might there be order effects or education effects - where discussing something early on changes vital attitudes later
- Does it spend enough time on the priorities?

Always try a guide on for size. Ideally run through with a colleague who is not part of the project – or at the very least, put yourself in the respondent's shoes.

Using stimulus material

48. Roles and types of stimulus material

Somewhat tautologously, stimulus material is defined as anything that has the specific purpose of stimulating discussion. This would include: packs, logos, brochures, descriptions of new ideas, materials intended to represent moods or need states and so on. Stimulus material has roles in managing both process and content:

- Speeding up development of the relationship and making the interviewing process easier by concretising issues
- Enabling respondents to say more about the subject by providing information or ideas
- Representing ideas, products, and commercials, which do not yet exist, in order to discuss reactions.

Defining your needs in stimulus material

Stimulus material is either used to elicit feelings, associations or attitudes, in which case it needs to be as open-ended and stimulating as possible, or to help make a decision on a particular approach to advertising, packaging, etc. In this case, it should reflect or re-create all the elements of that approach in whatever way is possible.

Unless you are working with fully finished products or ads, the biggest issue is the gap between strategy and execution – the idea and the expression of it in stimulus.

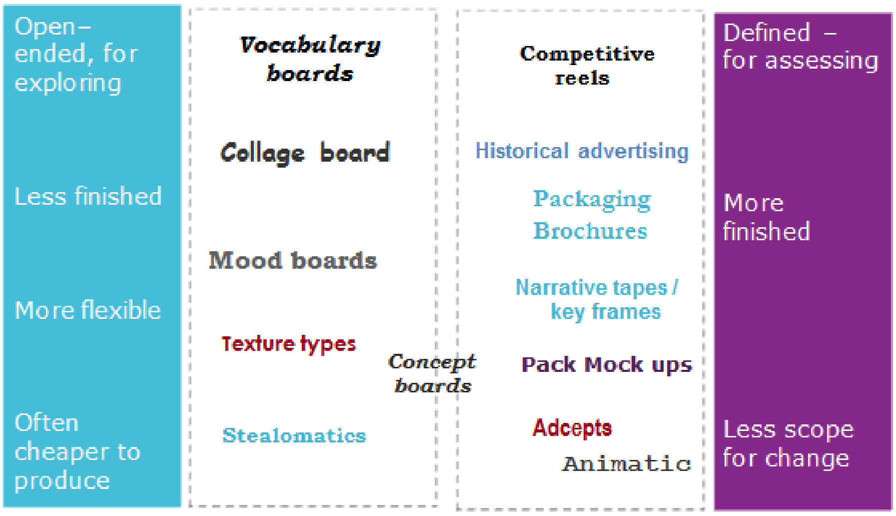
The basic principle is to identify what respondents will need to experience, and to present that experience to them in an open-ended way. This means they can reject the stimulus without rejecting the idea.

Respondent: *"The picture is a bit daft. They are out in the country and she looks like she is going to a party – look at those shoes!"*

Interviewer: *"What about the idea they are trying to get across in the words?"*

Respondent: *"They have a point. Last weekend I felt really rubbish after a heavy Friday night. It is a waste. The picture just doesn't get that across though."*

There are many different types of stimulus



49. Working with concepts

Concepts are variously defined, but typically might have

- A headline
- An insight based on consumer understanding
- A discriminating benefit, which is the functional or emotional solution the product offers
- The reason why the consumer should believe the benefit (often an explanation of how the product works to deliver it)
- A tagline
- A visual

New Gray's Cookies are the best tasting yet guilt free pleasure that you can find in a Cookie.

- Do you feel guilty when you stick your hand in the cookie jar? Wouldn't it be great if you could just sneak a cookie without worry that you had gone off your diet?
- New Grays' Cookies allow you to have the best tasting yet guilt free pleasure so you can stay in control of your health.
- That's because Gray's is low in fat and calories, yet still tastes good. In blind taste tests, Grays Cookies matched the market leaders on taste, but only has 100 calories and 2g of fat. In a 12 week study, consumers using Grays once a night as a desert were able to lose 5lbs.

Try new Gray's Cookies and find your way to stay healthy.

- Many consumers will be confused by the word 'concept'. Introduce it as "a description of an idea"
- Choose whether you want to have it on a large board which you read out, or whether you give it to the respondent on a sheet of paper to read and annotate in their own time.
- If you have more than one, rotate the order
- Check understanding before you ask for reactions
- Get top of mind, System 1 reactions first
- Find any power words and assess their implications

If you are working in depth, you can include:

- Do they relate to the insight?
- Benefit – does it solve a problem for them, or give them something they value?
- Feelings – positive, negative, liking, irritation etc.,
- Relevance – is it something that has a place in their life?
- User type – who is it aimed at? Is it a type of person like them?
- Difference – does the benefit really discriminate?
- Changes or improvements?
- Purchasing and usage – do they see themselves buying it and using it?
- You can also explore brand fit

Using simple projective techniques

Qualitative research has limitations that projective techniques help us to overcome. Interviewing is based on people telling us stuff, yet there are a lot of things they don't want to say, don't know how to say, or don't know they know.

Some things lie outside of their conscious awareness:

- Memories are partial, fluid and can change during recall.
- There are limits to self-awareness: habitual behaviour, cultural norms, heuristic decision-making, and personal traits and motivations.
- A lot of information stored in the brain is visual or kinaesthetic and needs to be surfaced before it can be put into words.
- There just aren't enough words for some of the more complex situations and feelings we encounter.
- There are things we intuitively know how to do, but don't know how we know them.

Without the use of these techniques, research can be superficial, inaccurate and misleading.

Researchers use the word 'projectives' as a catch-all for a large range of techniques that help the process of interviewing. They make it:

- Richer and more expressive
- Easier and more engaging to describe things that people are willing to talk about;
- Safer to talk about things that people are reluctant to talk about:
- Possible to discuss things that are of interest to marketers and communicators, but don't exist for ordinary people, e.g. brand images, organisational values

What is Projection?

Projective techniques involve the use of a vague, ambiguous, stimulus in which the subject 'projects' his or her personality, attitude, opinions and self-concept to give the situation some structure. In psychoanalytic literature, the concept of projection is a defence mechanism that externalises unpleasant feelings or unconscious ideas.

Top tip:
Involve your participant/s in analysing the meaning of data you get from techniques.

E.g. "You said a good analogy for that company was a seaside town in the 1950's. Can we think what specifically that means in terms of your feelings about them?"

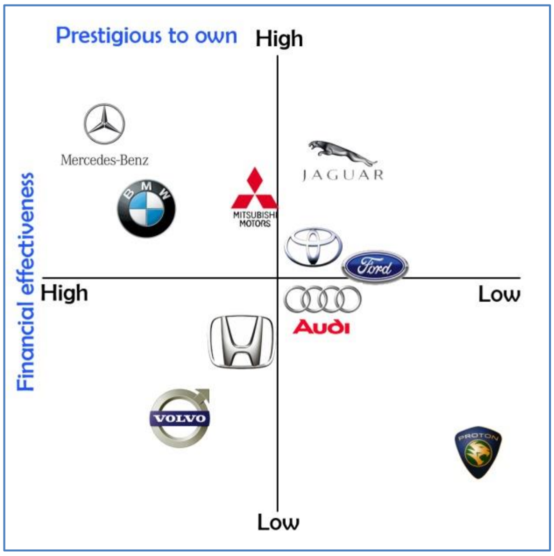
There are several types of techniques – techniques of association, completion, construction and expressive techniques.
Some techniques work better in groups, but it is worth using the following in depths, as long as

- You explain to the respondent why you want to do it
- You don't pressure them if they don't want to do it
- You ask the respondent to explain what it means to them
- You can move on if it does not work

Word association

Respondents are asked for the first words that come to mind when they hear or see another word. This type of exercise is used to explore connections between things, to uncover the language used in relation to the issue under investigation and to understand what words are associated with brands or products. It helps to write the words down on sticky notes to talk about them afterwards.

Mapping

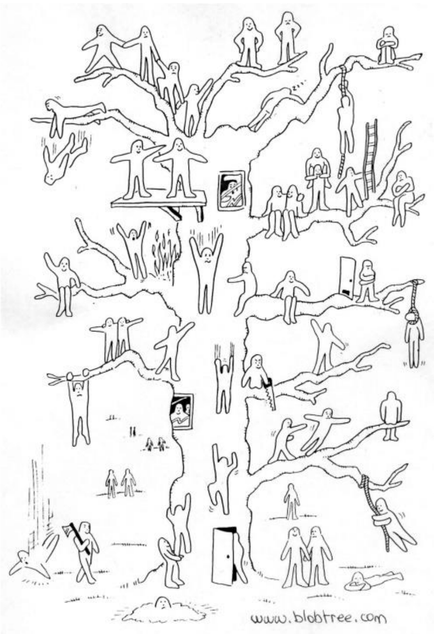


Respondents are asked to sort or group brands/products or organisations. You can use logos, products or names.

The aim is to understand how they see a market or a business environment. Open-ended mapping is started by saying "*group these together in whatever ways they go together.*" Allow respondents time to create the groupings, then ask what each group has in common, and how they differ from each other. The respondent must choose the criteria.
A more directed mapping (as in the image) can ask the respondent to sort on particular dimensions.

The Blob Tree

This is a true projective technique in which the respondents' feelings are projected onto the characters. They feel safer discussing them as the feelings now 'belong' to the characters. You will find many other types and settings of Blobs on the website. If you like the technique, buy a licence to use it. Note that the licence does not include online.



Give out the drawing, and ask the respondent to circle relevant figures, for example: 2 figures that represent something positive and 2 that represent something negative. Or you can be more open-ended and say, "*Circle as many figures as you want that represent the feelings you have about X.*"

Get the respondent to explain why the blobs were chosen. The meanings and not always obvious.

All projective techniques are designed to move the conversation on to something more insightful and deeper. You can read more, and see other examples, here.

Analysing qualitative data

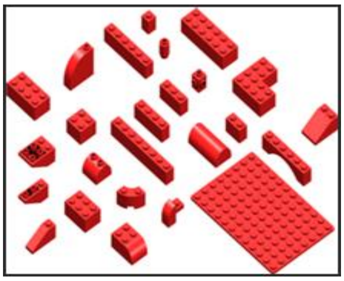
Doing analysis helps the researcher to:

- Remember or notice important points that may have escaped during the pressures of the interviewing process
- Take account of different sources of bias
- Produce a report that both answers the objectives and offers new information and insights

Technically the word **analysis** applied more to the **data handling** – the sifting, sorting, labelling and differentiating of the data, while **interpretation** applies more to the **thinking part** – although in practice these tend to both happen all at once.

Here is a metaphor for the process of A & I. Your starting point is to go back to the objectives, and then look at your large pile of data. If you have done several interviews it may feel quite jumbled. There will be some memorable insights but the rest is a mess.

Analysis starts by sorting into piles of similar stuff. (And throwing out anything broken or irrelevant along the way.) This may take the format of a spreadsheet where relevant verbatims are put in the grid by topic and type of respondent. Or it can be a form of coding, where you attach labels to sort similar responses. (Notice there is always a bit of stuff left over – you don't know quite where it belongs. Your aim is to minimise that pile.)



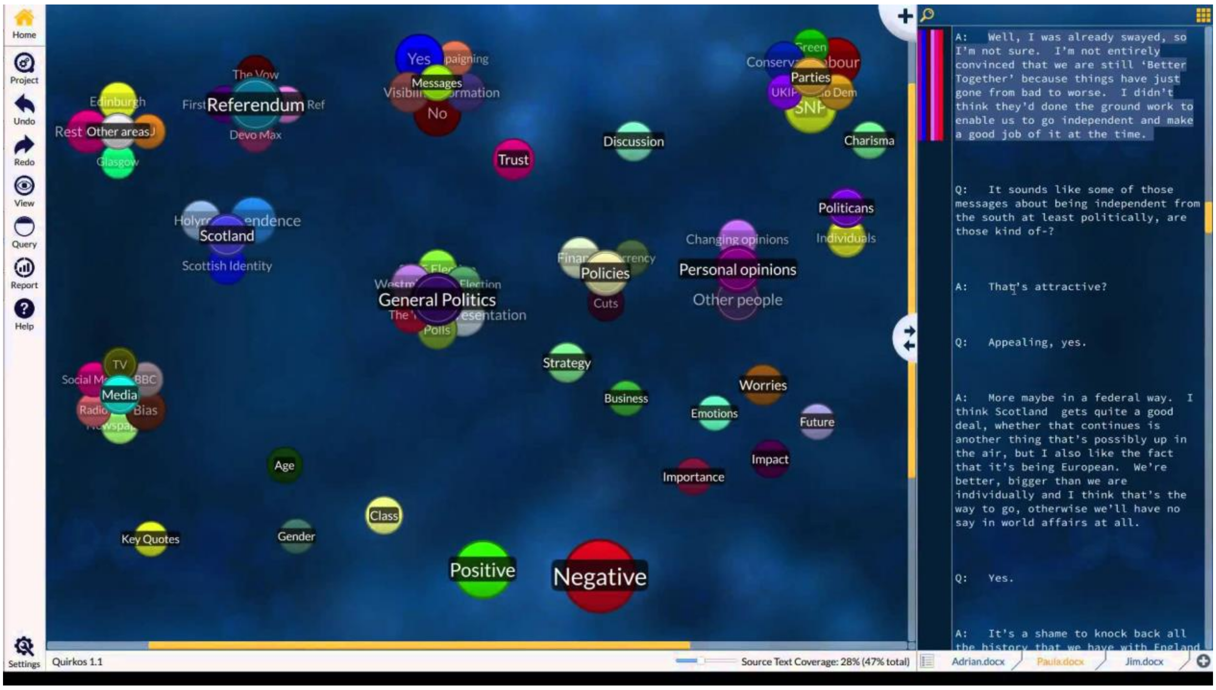
Next you look within each pile or category, and start thinking about what you could build with the pieces you have. Ideas will have already suggested themselves during the sorting, as this stage is all about **immersion and pattern matching.** You have no wheels, but a platform and some sides? That starts to guide some of your options.

Having gathered together various thoughts from the different piles – you might at this point try to put something together. A theory, or an explanation. You will switch from immersion into **helicopter view** to get the big picture.

Chances are that your first attempt will be disappointing and you will need to immerse once more in the piles of data, and develop better ideas about what they mean. Your ideas are not fully formed and don't explain the research findings fully.

The rest of the process consists of refining the theory / the explanation / the reasoning, by alternating between something that helps you examine the data in more detail (the spreadsheet, maybe software) and something that helps you see the bigger patterns – diagrams, mind maps, a 'thought dump' of connections.

Academic researchers use software to help them manage the data. See [CAQDAS – Computer Aided Qualitative Data AnalysiS](#) It is worthwhile buying and learning it for very large projects. For a smaller scale project, and much easier to use is [Quirkos](#) – developed by an academic. It involves coding transcripts or notes, and creates a visual representation of the codes, and allows them to be manipulated and merged.



No software however, is able to do the interpretive thinking for you. This includes:

- What concepts and patterns emerge and what do they mean?
- What theories might helpfully give an added explanation?
- What does it all mean in relation to the client's question?

The result

You are aiming to construct a story – that has relevance, sense and meaning to the research question – and uses as many of the bits of data as possible. (This is called closing the hermeneutic circle). If you still have a bucketful left over your story will not be very robust.

The following list of questions may be useful in checking the quality of a piece of data analysis:

- How plausible are the findings?
- Do they make sense?
- Are they intuitive or counter-intuitive? Surprising or what you might expect?
- How much evidence is there to support them?
- How credible and plausible is this evidence?
- How does it fit with what you know of the issue/market/brand?
- How does it fit with evidence gathered elsewhere?
- From other research in this area?
- From theory?
- Have alternative explanations or interpretations been presented?
- Do these other explanations fit the data better?
- Has the researcher been systematic and rigorous in looking for evidence and taking into account all views and perspectives?
- Are contradictions, oddities or outliers accounted for or explained?
- Has the researcher introduced any bias?
- Has he or she given more weight to what the more articulate in the sample have said at the expense of others?
- Is he or she seeing in the data what he or she wants to see?
- Has the researcher over-interpreted things? Gone too far beyond the data?
- Has anything been missed or overlooked?

Appendix

Lingo Bingo – *you can tick them when you can define them*

Ethnography	Saturation	Paralinguistics	Demographics
Positivist	Purposive	Congruence	Emic
Reflexive	Emotional contagion	Triangulation	Constructivist
Etic	Confirmability	Empathy	Anonymity
Online disinhibition	Choice blindness	Repeat receipts	System 1
System 2	Projection	Rapport	Execution

(You can use this as an interactive bingo game in a group of learners).

Depth Interview feedback form

Part 1 - Initial impressions during the interview – quick notes as you watch

Interviewer's introduction – comprehensive, reassuring?

Types of questions?

Open,
Closed,
Leading
Getting information without direct questions
– paraphrasing, summarising
Clarifying and probing to go deeper/more precise

Showing they are listening

Giving respondent enough time

Managing the time

Body language

Relationship – rapport, empathy?

Staying neutral

Use of stimulus material or techniques

Getting the required information/insight

Words that describe the interviewer's style?

Words that describe how the respondent is experiencing the interview

Part 2 – more considered feedback after the interview

Tick below if the interviewer demonstrates desired or undesired traits, or both. Some points may not apply in any given interview, or there may be aspects of both desired and undesired.

Desired attitudes, skills, behaviour	**Desired ✓**	**Both ✓**	**Un Desired ✓**	**Undesired attitudes, skills, behaviour**	**Comment: how to improve**
Professional, calm and respectful				Unprofessional	
Clear introduction, informed consent, topics, concern for respondent well- being				Unclear, rushed or inadequate introduction	
Builds relationship; eye contact, interest, puts at ease				Does not attempt to build relationship	
Does not indicate any personal views on the research subject				Respondent could guess interviewer's opinions	
Observes respondent's feelings, comfort and engagement				Unaware of how respondent feels or reacts	
Manages time well				Some parts too slow or rushed	
Uses mainly open questions				Tendency to closed questions	
Is not leading				Leading - desired answer is implied in the question	
Clarifies and probes when appropriate				Misses opportunities to clarify and probe	
Follows up on interesting leads that are not in the guide				Rigidly follows the guide	
Reframes questions if required				Does not find other ways of asking questions	
Challenges respondent if necessary				Does not challenge	
Shows they are listening				Does not show listening	
Listens to the meaning implied in the words				Does not listen deeply	
Listens non-judgementally				Respondent might feel judged	
Gives respondent time and encouragement to express				Does not help respondent to express	
Manages difficult situations (awkward, sensitive, embarrassing)				Does not manage them well	
Uses stimulus & techniques appropriately				Used at the wrong time or ineffectively	
Summarises at key points & end				Does not summarise enough	
Closes well				Abrupt close	

Listening Skills Checklist[8]

	4 Always	3 Often	2 Seldom	1 Never
I make sure I understand the vocabulary used by the speaker	4	3	2	1
I paraphrase what the speaker has said to check understanding	4	3	2	1
I observe the body language of the speaker	4	3	2	1
I let the speaker finish before replying	4	3	2	1
I encourage the speaker by nodding and other non-verbal cues	4	3	2	1
I make encouraging noises – I see, uh huh, tell me more, etc.	4	3	2	1
I disregard the speaker's dress and appearance	4	3	2	1
I am alert to the speaker's underlying feelings as well as the facts	4	3	2	1
I keep my mind on what the speaker is saying	4	3	2	1
I summarise my understanding of the conversation	4	3	2	1
I mirror the speaker's body language when appropriate	4	3	2	1
I consider the speaker's point of view	4	3	2	1
I feel I can understand how the speaker feels even if I wouldn't feel that way	4	3	2	1
I make appropriate eye contact with the speaker	4	3	2	1
TOTAL				

If your score is 51-56, you are either a brilliant listener or you have cheated

30- 50 - you are good at using body language and you are an active listener.

15-30 - There is room for improvement – you are probably aware of your weak points

8 Adapted from Compendium of Questionnaires and Inventories, Sarah Cook, Gower, Aldershot

Less than 30 – do the following exercise. It's a sentence completion – write quickly the first thing that comes into your head.

I switch off when someone is talking and they.......

If I can't have my say in a conversation I feel........

If I can't understand what someone is saying I......

I feel nervous listening to someone when.....

Habits I find irritating in a speaker include.....

If a speaker is not very bright I......

Things that distract me when I am listening are......

When a speaker talks about emotions I.........

When people I talk to don't know as much about the subject as I do, I ....

Answers to Quick Quiz

Costco is a membership warehouse that sells at discount prices. It has a co-branded credit card for customers to earn rewards when they shop. Costco has just changed card partnerships from American Express to Visa. Costco customers will now need to use the Costco Anywhere Visa - not the American Express Costco card. Many members say they have not received their new Costco Visa card in the mail or are struggling to activate it. The context is that the competitive Wal-Mart Sam's Club is expanding. And there are challenges from online retailers, specifically Boxed, and increasingly Amazon.
Research is needed to assess the potential damage to customer loyalty by these credit card problems. Costco management cannot implement a solution (that is up to Visa) but need to know whether, and what type of crisis management to implement.
Qualitative, quantitative or both?

It is important to know the scale of the issue, so unless they already have figures there will be a need for quantitative research first to discover just how many members are having problems. ('Many members' is too vague and we don't know what it's based on.) Assuming the issue is significant, qualitative research can establish:

- In what ways members are involved with and 'loyal' to Costco – are the benefits practical, emotional, social?
- Which competitor brands/products might tempt them and why?
- How they perceive the credit card problem and the way it has been handled so far?
- How the brand- customer relationship can be strengthened in general and what is the appropriate response to this situation?

There is a high rate of stress and mental illness among healthcare workers, yet many continue to work despite symptoms that affect their performance. There is a 'conspiracy of silence'. Workers with mental health issues are typically ostracized and do not get the support that they need. Early identification and support can improve work outcomes and facilitate recovery, but more information is needed about how to facilitate this process in the context of healthcare work.
Research is needed to explore the key individual and organizational forces that shape early intervention and support for healthcare workers who are struggling with mental health issues, and to identify barriers and opportunities for change.
Qualitative, quantitative, or both?

"A high rate of stress" implies quantitative data is available already, so is qualitative understanding that is needed. This very sensitive piece of work would require depth interviews not only with those affected, but their co-workers and management.

To overcome the 'conspiracy of silence' some observational research may be required to observe the dynamics in work teams. And possibly some analysis of organisational communications would shed light on why there is a lack of support and how to change the culture.

POM is a pomegranate drink. An ad featuring a frayed noose has been banned for misleading consumers by claiming that the juice could help consumers "cheat death" and live longer.

The Advertising Standards Authority received 23 complaints that the claims in the ad "misleadingly exaggerated" the health benefits of drinking the juice. POM Wonderful has defended the ad, arguing that it was common in advertising to make claims that were "so exaggerated it could not possibly be taken seriously by consumers". It said that it believed such outrageous statements were permissible under the UK advertising code. POM now needs some research to back up its statement. Quantitative, qualitative or both?

There needs to be a qualitative exploration of how seriously consumers treat advertising health claims in general, and how they react to this one in particular. You can expect that the noose will be a powerful visual emotional element and there may be a degree to which it interferes with the 'life giving' claim of the ad.

Having understood the dynamics of how the ad works, there may be a need to quantify some of the reactions, in order to provide enough 'proof' to the ASA.