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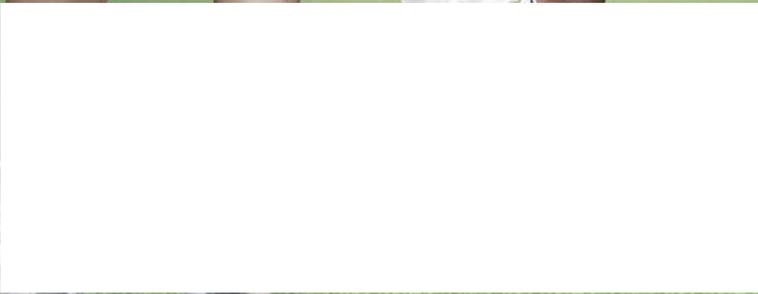


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The Qualitative/ Quantitative Interface

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In point of fact, it is impossible to write a qualitative analysis without referring to quantitative ideas.

Classic Perspective: Qualitative Research Precedes Quantitative Research

If I were in a room with an average group of purchasers of marketing research, I would ask for a show of hands. “How many agree with the following statement?”

A Caveat

Focus group research is qualitative in nature. Results can best be thought of as hypotheses. The sample sizes are too small — even when findings from several groups are combined — and the group dynamic process is too volatile for results to provide confident predictions about true market conditions.



I'm fairly sure a majority would raise their hands. (I say this because that is exactly what happened every time I asked this question of qualitative research students at the American Marketing Association's School of Marketing Research.) Almost all qualitative analysts used to include a caveat such as this in their reports, and many still do. It does, after all, reflect the classic perspective on qualitative research.

You know how it goes. Supposedly, qualitative research is/was:

- Drawn from the psychotherapeutic tradition, with a clinical heritage in the study of abnormal behavior.
- First applied in marketing during the explosive interest in motivational research in the 1950s.
- Ideal for exploring a territory, framing issues, learning the language consumers use, developing hypotheses and, yes, discovering motivations (clinicians only need apply), but certainly as a *first* step to be followed by quantitative validation.

The reason this perspective is classic is because it still works. In problem-detection studies, for example, qualitative research is used to create a list of problems that consumers encounter in a product category. Then, quantitative research is conducted to identify those problems that occur frequently, that are not well solved by competitors and that are troublesome when they do occur. Find a problem like that, and you'll have the definition of a new product opportunity. Similarly, in customer satisfaction research, the list of performance attributes to be measured is usually discovered qualitatively.

Very often, then, qualitative research precedes quantitative research in order to be able to create the quantitative instrument. Not separate worlds, then, but different parts of the same world. This seems like a fairly intimate connection. And it's only one of many.

When Quantitative Research Precedes Qualitative Research

Sometimes quantitative research precedes qualitative research. This might be referred to as "a search for meaning."

One example occurs in copy testing. You're probably familiar with the technique where respondents twist a dial to indicate their second-to-second level of interest as they are watching a commercial. The collective result is thought to represent the level of arousal created by each frame of the commercial. To fully understand these findings, though, a small sample of respondents is brought back and asked to discuss why they turned the dial the way they did.

Here's another example. A truck manufacturer had an annual contract with a large provider of

sales-tracking information based on new vehicle registrations. They noticed that trucks with a special set of characteristics were performing much more poorly than they had in the past, but, based on their understanding of the market, they could find no reason why. Conducting a few focus groups among recent purchasers of the manufacturer's brand and of competitor brands led to a crystal-clear understanding of a fundamental change in the market that was just beginning. This represented a powerful outcome, but we would never have thought to do that research without the anomalous quantitative finding.

Quantitative Tools in Qualitative Setting

Sometimes we can use quantitative tools in a qualitative environment. For example, perceptual mapping is a fairly robust quantitative tool. However, for a financial-services client, we were able to create a (hypothetical) perceptual map in a focus group.

First, we asked respondents to collectively and publicly generate a list of adjectives that might be used to describe providers of financial services. Then we revealed a large board on which were two labeled axes that previous quantitative research had indicated were the most important variables in the customer-selection process — how much risk the customer would encounter by using a provider (on the board, the ends of this axis were labeled High Risk and Low Risk) and the degree to which the services might be considered Sophisticated or Unsophisticated (see chart on page 17). Respondents also had the logos of eight different providers of financial services, e.g., brokerage firms, insurance companies, large banks, etc. They were given two tasks: first, transfer the adjectives to the appropriate quadrant, and second, place the logos where they belonged. The results can be found in the chart.

Several things are immediately apparent. The nature of the four quadrants can be understood because of the adjectives. Brands 1, 4 and 8 are outliers, with Brand 1 especially occupying a weak space — High Risk/Unsophisticated Services. Brands 5, 6 and 7 are peas in a pod. (The client kept that chart on the wall of his office for months.)

Qualitative Research in a Quantitative Setting

There is actually a form of quantitative research that is intended to assess an essentially qualitative experience. It is a form of factor analysis called the Q Methodology or the Q-Sort, and it was developed in 1935 by British physicist-psychologist, William Stephenson.

As you are aware, factor analysis is usually thought of as the tool to use when there are a

large number of variables, such as product attributes, that can be combined, based on the similarity of responses among respondents, into a reduced number, termed “factors.” The point is that the factor analysis is done on the variables. In the Q Methodology, the respondents get put into groups based on their similarity of responses across the variables. Most practitioners agree that what they are really trying to do is reveal the underlying subjectivity in any situation — “life lived from the standpoint of the person living it.” (Brown, Stephen R., 1991/1992, A Q Methodological Tutorial, eight postings to QUARLS-L@UGA)

When Qualitative Data Are Enough

In each of the preceding examples, there was a direct linkage between quantitative and qualitative efforts. Sometimes, though, qualitative research is all there is.

For example, a small proportion of qualitative research actually requires a clinician (in order to execute it) and seeks to understand underlying consumer motivations. Remember your Freud: motivations may not even be known to the individual; they may be subconscious. And, even if they are known, who is to say the respondent is telling the truth? This research tends to be custom, and so even though there are literally thousands of psychological tests, including many relating to motivations, I am not aware of any being used in the consumer research arena. (I’d be interested in hearing from you to correct any misperceptions I may have about this.) In this case, then, the qualitative data stand alone.

(However, the analyst is everything in this form of qualitative research. The history of our profession teaches that an inconsistent interpretation of the meaning of prunes [Was it the wrinkles that reminded people of old age or the unpleasant association with bowel movement that led to low sales?] is what ended advertising’s fascination with motivational research. Different analyst, different results.)

I’m sure you’ve been involved in qualitative projects whose results resonated with what may be termed “the ring of truth.” This is akin to the earlier example I mentioned about the truck manufacturer, only there is no quantitative precursor or follower, just the focus groups.

For instance, in a case involving a supplier of control-room equipment to the nuclear power industry, we learned that the influence of consulting engineers in specifying designs had declined and that the role of internal engineers at the operating company had become more important. This made immediate sense to the client, who felt advertising had been declining in

effectiveness without knowing why. Hundreds of thousands of dollars in the advertising media mix were reallocated based on the findings, and the results improved. So it appears that qualitative research alone, when used by a sophisticated professional, and when it is consistent with other information, can be used to make important decisions.

There’s a quantitative concept called “regression towards the mean.” It suggests that the bigger the sample, the more likely findings based on it will represent the population from which it is drawn. Think of it as adding additional cases. If you have a sample of 10, an average taken from it might or might not well represent a large population, but as you add to the sample, it becomes more and more accurate in representing the population. In a sense, then, as you add to the sample, you are marching towards the mean (average).

The same kind of thinking applies in qualitative research, too. If you conduct three groups, you might learn new things from each one. If you do six, you’ll both learn some new things and gain confidence that some of what you learned earlier is true. And if you do 12 groups, you probably are regressing towards the mean, in the sense that you probably will not learn too many new things, but you will confirm a lot of things.

There is a form of qualitative research that is based on just this notion, called “going on a safari.” The idea here is to stay out on the road doing sessions from place to place until you stop hearing something new. When that happens, you are done and know what you need to know.

Finally, we had a case with only nine customers (school districts actually) who had purchased a capital good that would last for years. They were embedded in three focus groups in three different cities along with superintendents, principals and members of Boards of Education of other nearby school districts. Three groups included everyone. No need to do more.

So is there a quantitative interface in the case where the only research is qualitative and the number of groups is not large? Yes! The most often-used quantitative tool in qualitative research is usually invisible to the moderator, the analyst (if different) and the end-user. But, in point of fact, it is impossible to write a qualitative analysis without referring to quantitative ideas. That’s because to analyze qualitative research is to properly characterize the findings and distinguish differences, and both these activities are numerate at their core.

See if these ideas are familiar. Have you ever

pushed for a consensus? Have you ever asked for a show of hands? Have you ever asked respondents to write things down and hand them in, and then you counted how many responses you received of one type or another? In your analyses, have you ever said or thought any of the following: “none,” “only one,” “just a few,” “some,” “about half,” “a slight majority,” “many,” “a strong majority,” “nearly every one,” “all”? Have you ever noted that male respondents were different than female respondents or that marrieds were different than singles, etc.? These are all quantitative notions.

In sum, then, from the point of view of the qualitative researcher, the qualitative/quantitative connection is intimate, intertwined and ever present. 📄

Figure 1

