ONLINE QUALITATIVE DESIGN & ANALYSIS

Jim White Phd., Co-Founder & Human Insights Strategist at RealityCheck Inc.

RealityCheck ®
Human Insight Strategists

Qualitative Research and Online Research Data

One of the biggest challenges of conducting online qualitative research is analysis. Digital qualitative studies produce an overwhelming amount of unstructured data including lengthy narrative text, imagery and video.

Many qualitative research consultants struggle with this avalanche of information.

This ebook suggests a new paradigm for the analysis of digital qualitative data that allows researchers to deal with this new world of data more efficiently and comprehensively.

Specifically, this ebook explores the unique analytical challenges posed by online qualitative. It discusses key differences between the face-to-face qualitative experience and the digital experience, and the implications of these differences for developing rich insights. And, it explores specific strategies for qualitative analysis in the digital age.

Why Are So Many Researchers Uncomfortable with Online Qual?

Many qualitative research consultants have not fully embraced online qualitative because they feel overwhelmed by the amount of unstructured data it produces. By unstructured data I mean data that aren't easily quantified. This includes lengthy narrative text, imagery and video.

In addition, many qualitative consultants find the experience of face-to-face qualitative research—focus groups, individual interviews and ethnographic interviews—to be more personally gratifying than online qual.

Why is that?

As we all know from seeing the rise of social media over the past several years, the experience of engaging with a person online is fundamentally different than engaging with him or her face-to-face.

A great deal has been written on this subject. Most of this literature laments the decline of face-to-face communication, our interpersonal skills, and social etiquette as we become increasingly attached to our screens.

Qualitative research consultants feel this difference as well when they compare the experience of conducting face-to-face research with the experience of conducting online research.

One of my clients summed up why she prefers face-to-face qualitative fieldwork over the digital experience:

"There's an energy in the space between people and I like to feel that. I like to look into eyes and make a deeper connection. The immediacy of face-to-face means you can instantly read their ever-changing thoughts and shape the vibe with a question, or silence or a joke. It allows you to get deeper into who they really are."

The way she experiences another person in face-to-face communication gives her the sense that she understands him or her on a deeper level. Her face-to-face interactions with respondents feel more immediate and she feels a greater sense of control by being able to shape the conversation in real time.

In addition, in a face-to-face setting she has access to other forms of interpersonal communication in addition to speech. She can see and use non-verbal cues like facial expressions, posture, gestures and vocal inflection to deepen her understanding of the people she is talking to. And she can use these forms of interpersonal communication to convey meaning to them.

F2F IS A CONVERSATION

Simply put, face-to-face qualitative research is a conversation.

The "data" that it produces is conversational data—speech, expression, body language and inflection. What's more, all of these "data" happen in a conversational context in which we, the researchers, are participants.

That means our own experience in the conversation—our emotions and thoughts—are part of the "data set" we collect. We draw upon our experience in the moment to make sense of what's happening, just like we'd do in any conversation, whether we are conscious of it or not.

But in a digital setting, we lose much—if not all—of these conversational pieces of data. We can't monitor body language, facial expressions, vocal inflection as well—if at all.

And we lose the unmediated, immediate conversational nature of the face-to-face experience.

So, why do so many qualitative research consultants hate doing online qualitative research?

Because they try to approach it like face-to-face qualitative research.

Their expectations are shaped by their face-to-face research experiences. And when the digital experience isn't the same, they are unsatisfied, let down, and oftentimes frustrated.

The tendency to approach online qualitative research like face-to-face research is why so many researchers still use online bulletin boards and chat forums to conduct digital research.

Even though technology has far surpassed bulletin board approaches in online qual, the method still hangs on. This is because we continue to apply a face-to-face paradigm when conducting qualitative research.

But online bulletin boards and chat forums are a hollow compromise. They are a half measure. They possess none of the rich nonverbal cues of face-to-face interaction nor the full, multi-dimensional potential that many online qualitative research platforms offer today.

Online bulletin boards and chat forums are an attempt to force fit the online experience into the old face-to-face paradigm.

But it doesn't fit. It's a square peg in a round hole.

No matter how hard you try, you will not maximize the potential of online qualitative research by continuing to use simple bulletin board and chat forum-style approaches.

TOWARD A NEW PARADIGM FOR ONLINE QUALITATIVE

That's why we need a new paradigm for online qualitative research. One that offers a new guiding metaphor that allows us to get the most from the experience, one that is not rooted in the expectations of face-to-face qualitative.

We need a paradigm that begins with the understanding that digital communication is different.

Marshall McLuhan knew this. His famous quote, "The medium is the message," instructed us of this very thing.

An online qualitative study is not a focus group. It's not an individual depth interview. It's not an ethnographic interview. It's a fundamentally different form of interaction. The experience is different for respondents. And it is vastly different for researchers.

"The medium is the message. This is merely to say that the personal and social consequences of any medium—that is, of any extension of ourselves—result from the new scale that is introduced into our affairs by each extension of ourselves or by any new technology."

-Marshall McLuhan

As long as we continue to compare the digital experience to the face-to-face experience and hold it up against the same criteria for success, we will be disappointed. And as long as we try to apply the same analytical approaches we apply to face-to-face approaches, we will fail to make the most out of the online qualitative data we collect.

Our new paradigm should allow us to maintain the depth of insight that only qualitative research can produce, but recognize online qualitative data for what it is.

F2F = Analysis of Conversation

So what is it? What exactly are we analyzing when we analyze online qualitative data?

If it's not a conversation, what is it?

Online = Analysis of Texts

I believe it's text. And the analysis of online qualitative data is an analysis of texts.

I mean "text" in the broad sense of that term, the way an anthropologist or linguist would use the term.

There are at least four basic types of "texts" that online qualitative produces and that researchers who specialize in the analysis of text focus on.

- **Oral:** There are oral texts, characterized by the spoken word. We often capture these texts through video and audio recordings in which respondents describe thoughts, feelings and experiences.

- **Written:** Obviously, there are written "texts," created in response to open-ended questions, storytelling activities, online diary submissions and more.

- **Iconic:** There are iconic texts. These are the symbols and other visual expressions that we use to express identity, values, beliefs and group affiliation, among other things.

- **Audio-visual:** And there are audio-visual texts through which people show us their worlds or express something about their cultural experience.

There is a range of analytical traditions that have been developed across various disciplines to study "texts" such as these.

We need to start tapping into these traditions for analytical approaches better suited to the textual data that online qualitative research produces. Doing so will deepen our analysis and make it a more fulfilling experience for us as researchers.

There are several analytical traditions that focus on the analysis of "texts." They include:

- **Textual Analysis:** Broadly speaking, this discipline uses texts such as films, television programs, magazines, advertisements, clothes, graffiti, and so on, to understand how a group or culture makes sense of the world.

- **Narrative Analysis:** Narrative analysis looks at stories, journals, photos and other artifacts of life experience, to understand the way people create meaning in their lives through narrative.

- **Linguistics:** The study of language and its structure. Of particular interest to me is the use of metaphor and how it shapes our perceptions of the world.

- **Semiotics:** The study of cultural symbolism, that is, how meaning is conveyed through all aspects of communication.

These fields of study offer a rich set of perspectives and can provide a range of techniques for qualitative researchers to mine and apply to the analysis of data collected through online studies.

RealityCheck®
Human Insight Strategists

In addition to these analytical traditions, there are specific tools that cut across disciplines that qualitative researchers should begin to use more than we currently do.

Content Analysis

Forgive me for suggesting that we actually count things in qualitative research, but it's useful. Content Analysis can provide a level of depth and accuracy that far surpasses what I'd call an impression-based analytical approach.

Content analysis is a method for summarizing any form of content by counting various aspects of it.

This can sometimes enable a more objective evaluation than comparing content based on the qualitative impressions of the researcher.

Here's an example.

A year ago I had a colleague analyze 35-40 online answers to a story-telling activity. At the same time, myself and a junior analyst content analyzed the same stories. The process involved he and I reading the stories, creating a thematic "codebook," and then going back through and "coding" sentences into the thematic areas. While we didn't go as far as to calculate inter-coder reliability, we did compare notes on a "sample" of sentences to make sure we were in agreement.

Then, my analyst went back through the stories and coded each sentence. The "story" of the data provided by my colleague—who did what I'd call an impression-based analysis—and the content analysis, were dramatically different.

While the "themes" that my colleague identified were indeed a few of the themes we found in the more rigorous analysis, they were by no means the most prominent themes.

Not by a long shot. And they weren't the only ones.

The problem with an impression-based analysis is precisely that it is subject to our impressions; our own personal filters. When we deal with the amount of data that is oftentimes produced by online qualitative, we can be easily mislead by such an impression-based approach. We risk misreading some themes or insights as more pronounced in the data than they really are or missing important themes altogether.

Text Analytics

Text Analytics can be useful if we think of it the right way. I think a number of us—myself included at one time—expected text analytics software to be kind of a magic button, press it and somehow miraculously insights will appear.

My experience has been that Text Analytics is much better thought of as a "data-wrangling" tool, rather than as an analysis tool. It is useful for making textual data more analyzable. But it doesn't do the analysis for you.

Personally, I use it to help focus my attention on emotive content more efficiently. Running a simple sentiment analysis on a respondent story allows you to see the phrases containing emotional content more quickly and easily.

If I want, I can then content analyze these phrases, coding the content into thematic categories more quickly than if I had to go find them without the help of software.

This is just scratching the surface of what Text Analytics can do and I'm learning more every day. But the point is, it's a useful tool if you think of it the right way.

F2F is Like a Journey Through the Data

I think there is one other major difference between the experience of online qualitative data analysis and face-to-face that I haven't mentioned yet.

Conducting face-to-face qualitative research is like taking a journey through data. We are travelers, moving through the data in a linear way, and we get to experience all of it as it happens—one focus group or interview at a time.

The story of the data unfolds as we move along, allowing us to see insights and themes develop while we're doing our fieldwork.

As we move through a face-to-face project, we are confident that we are not missing anything because we are experiencing all of the data first-hand. We're there, immersed in it, in real-time.

This causes us to feel a greater sense of control over the information we're processing. The data come at us in a way that is manageable. After all, it's a conversation. We can process it and shape it as it happens.

Online is Like a Tidal Wave of Data

The experience of online qualitative is very different. Instead of a linear journey through the data, the appropriate metaphor may be more along the lines of a tidal wave.

Particularly in activity-based online qualitative, respondent submissions—text, video, imagery—all seem to come at us at once.

It can be overwhelming. I know I've struggled to get the same comprehensive sense of it that I get when doing face-to-face fieldwork.

We want to feel like we're experiencing all of the data as it comes at us, but we simply can't. There's too much of it coming at us too fast. It threatens to drown us.
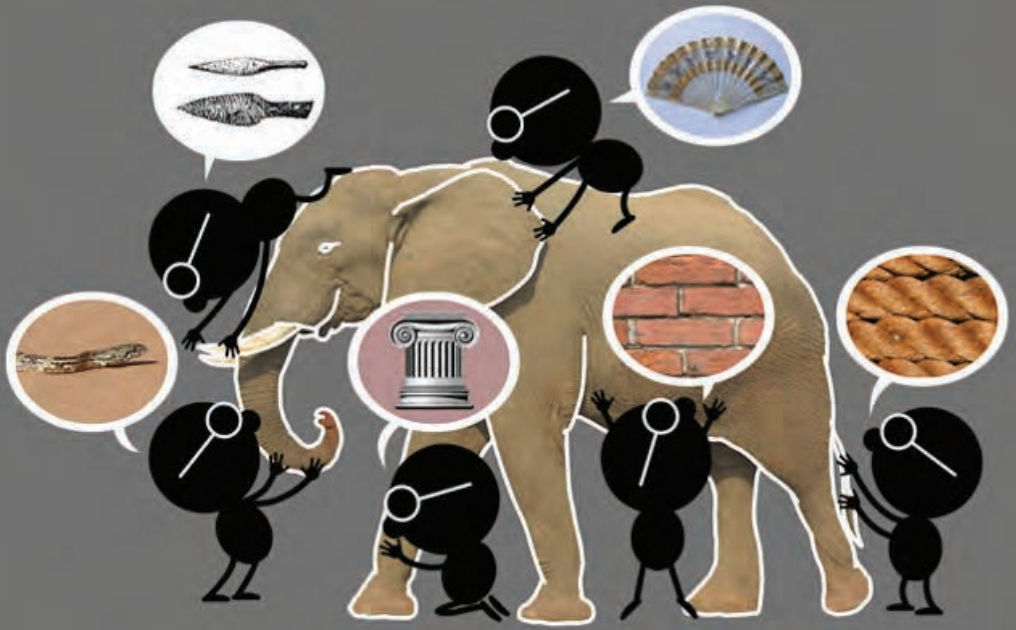
It reminds me of the story of the Blind Men and Elephant. We feel like we only see a part of what's happening. We fear that we'll misinterpret the data because we can't get our arms around it all.

So what can we do? There are at least two things;

1. We need to start treating analysis as a separate stage of the research process.

2. We need more teamwork.

TREAT ANALYSIS AS A SEPARATE PHASE OF THE PROCESS

For many of us, the research process tends to be this:

Design » Fieldwork/Analysis » Reporting

When we do face-to-face focus groups, IDIs or ethnography, analysis often happens during fieldwork. We confer with clients after each group or interview. Insights and themes emerge as fieldwork progresses. The insight story unfolds as we take our journey through the data. And we may adjust our fieldwork approaches and techniques as we learn. Indeed, this is one of the great benefits of qualitative research. It's flexible and it allows for the kind of organic, real-time insights and "aha" moments that we simply don't get from quantitative approaches.

This is a bias created by the conversational nature of face-to-face qualitative. We can't help but analyze as we go.

The whole post-group "debrief" ritual exists because we and our clients assume the analysis has already happened. We all heard the conversation. Now tell us what we learned.

I think many of us expect online research to be the same way. We want to be able to have the same analytical experience as with face-to-face qualitative. But we can't. Because it's not the same experience.

In the digital world, data don't present themselves to us in the same manageable, linear, conversational way as face-to-face data.

And at the risk of being a heretic, I say we need take a page from the handbook of our quantitative brethren.

In the quant world, the research process is more like this:

Design » Fieldwork » Data Tabulation » Analysis » Reporting

One step at a time.

In the quantitative world, the analytical phase itself is broken up into a least two parts—data tabulation and analysis.
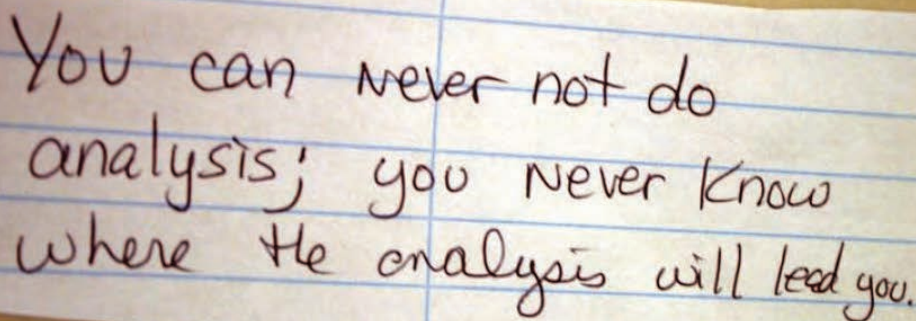
In the world of online qualitative data analysis, I suggest a similar process:

Design » Fieldwork » Data Wrangling » Analysis » Reporting

Data Wrangling is the process of getting unstructured data—the text, video, imagery—into analyzable form.

Specifically, this means grouping or coding "data"—whether it be visual or text—into broad thematic areas that then can be analyzed more rigorously.

I prefer a kind of initial sorting process, where we sift through the data by question or activity and group responses.

You can develop your own process here. The bottom line is, build in time for this. Make it part of your process. And come up with a way of doing it that makes sense for you.

WORK AS A TEAM

I think we can learn another important lesson from our quantitative colleagues. And that is teamwork.

If you remember the old story of the Blind Men and the Elephant… they overlooked the most obvious solution to their problem. To work as a team!

I know many of qualitative consultants are independent and usually work alone. After all, this makes sense for face-to-face qualitative because it is often our own personal journey through the data that reveals the best insights. We have a personal "aha" moment in the process of moderating a group or conducting an IDI. The answer comes to us.

But that sort of experience is harder in online qualitative. And I would argue that it's dangerous. Given the amount of data an online qualitative project can produce, jumping to an "aha" risks the pitfall of our Blind Philosophers. We may base our insights on a superficial sense of the data.

When it comes to online qualitative analysis, we need to embrace a team approach. One simple way is to enlist the help of junior analysts who can "wrangle" data for us, freeing senior-level consultants to focus their efforts on actual analysis.

But I'd suggest another approach.

I was recently given an article co-authored by Tom Stone, a psychologist at consumer research firm RealityCheck Consulting, about how multidisciplinary teams of specialists collaborate to treat youth offenders.

Teams usually include a counselor, teacher, nurse, probation officer, caseworker and psychologist. Each team member approaches treatment from their own discipline. A team "facilitator" coordinates efforts, "negotiates" conflicting recommendations and guides the team toward a unified treatment plan.

Applied to our world, this model suggests the idea of collaborative teams of consultants each lending their unique disciplinary expertise to the analysis of online qualitative.

Teams consisting of some combination of semioticians, linguists, rhetoricians, anthropologists and psychologists could provide a depth and richness of analysis that only a multi-disciplinary approach can produce.

The qualitative consultant could serve as "facilitator" of such a team, integrating insights from diverse fields into a cohesive story.

This multidisciplinary approach would no doubt impact study design, as we develop specific online activities to lend themselves to certain forms of analysis.

Toward a New Paradigm

Don't be an old dog. Learn new tricks

First of all, stop thinking of online qualitative as face-to-face, done online and applying the same analytical framework.

Instead, think of it as mechanism that allows us to capture a variety of "texts" for analysis.

Then, be curious. Explore research fields that take the "text" as their unit of analysis. Language, symbolic communication, iconography and video; these are more the data of digital qualitative than conversation.

Learn about Textual Analysis, Narrative Analysis, Linguistics and Semiotics, among other disciplines. Learn how anthropologists use "texts" to understand cultures. Learn how to do Content Analysis. Don't be afraid to count. Explore the use of Text Analytics to help make your analysis more efficient.

Separate fieldwork from analysis

Next, we need to begin thinking of analysis as a separate part of the research process. With online qualitative projects of any size, it's simply not possible to analyze during fieldwork, like we do with face-to-face qualitative. We simply don't experience the data the same way.

Treat fieldwork as fieldwork, and analysis as analysis. As a practical consideration, this means giving yourself more time. If you're going to do online qualitative analysis right, build the time into your proposal.

Teamwork. Teamwork. Teamwork.

Third, if you have friends, use them. If you don't, make some. Collaboration is key. Get help.

Whether it be through enlisting junior "analysts" to help "wrangle data" or collaborating with others who bring unique perspectives and disciplines to the analysis of "textual data," teamwork will help you get more out of online qualitative. And it's fun!

This doesn't mean you have to go out and hire a bunch of people. You can find a wealth of opportunities for collaboration with others who can bring new approaches to your analysis and allow you to go deeper without having to do it all yourself.

Start with the end in mind

And finally, start with the end in mind. One of my favorite graduate school professors who taught research methods drove this into our heads. He used to tell us that our analytical plan should be mapped out first and incorporated in our study design. Think through the kind of analysis you will do.

I know a lot of qualitative consultants might bristle at this sort thing. It might seem awfully rigid and doesn't allow for fluidity. But again, I think that kind of mindset is a holdover from face-to-face qualitative.

If we want to start getting the most out of online qualitative, we should start with the end in mind and think about the kind of analytical techniques we will be using.

Knowing this in advance will allow us to create online activities that will produce data better-suited to our analytical approach, and give us deeper, richer insights in the end.

About the Author

Jim White
FOUNDING PARTNER
Reality Check Inc.

Jim White is a Founding Partner of **Reality**Check, LLC. He has more than 20 years of experience in consumer insights, marketing and brand strategy. He started his professional career as a newspaper reporter and in many ways has never stopped thinking like a journalist. He believes in digging to find the story and that good research, like good reporting, is about finding the single-most important insight and conveying it in a simple, compelling narrative. Jim holds a doctorate in Communication Studies from Northwestern University and has taught courses in Communications Research Methods, the Psychology of Attitudes and Persuasion, Popular Culture and Brand Strategy.

RealityCheck®
Human Insight Strategists

We Help Brands Make Human Connections

To learn more about **Reality**Check, contact Jim White at jimw@realitycheckinc.com.com

www.RealityCheckInc.com