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The Qual Business Future Ain't What It Used to Be

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Program Preview

Chameleon Branding

Marrying Qualitative and Quantitative
Techniques in a New Media World



The Validity of Qualitative Research

In the movie sci-fi thriller *The Matrix*, humankind is trapped living in an artificial world created by machines and a giant computer program called the Matrix that simulates their lives. A few people escape and fight in the real world to overthrow the machines. These revolutionaries watch computer screens with the data of the Matrix streaming across, endless strings of numbers and letters. In one scene, a character relates how he does not even see the data on the screens anymore; instead, when looking at the data stream, he actually sees the people who are trapped in the computer program as they live out their lives.

Maybe one day in the future, we will develop tools to be able to see data “come to life” in a similar fashion. In the meantime, though, quantitative data has limitations as to how much understanding and insight can be derived, and the best way to achieve deeper insights about human motivations, thought processes, emotional stimuli and subconscious drivers remains qualitative marketing research.

In considering qualitative and quantitative marketing research, the idea of “validity” invariably enters the thought process. And, as we all know, quantitative research has validity and qualitative does not, right?

Wrong. Quantitative research has *statistical* validity, and it is true that qualitative does not. Statistical validity, however, only describes mathematical properties and relationships between numbers.

Pop Quiz: Suppose a poll is taken from a sample that is representative of a given target population, and the margin of error is ± 3 percentage points at the 95 percent confidence interval. One finding in the study is that 50 percent of respondents say they “definitely will buy” the product being tested. Therefore, which of the following is true:

- (a) 50 percent of the target population definitely will buy the product.
- (b) Between 47 percent and 53 percent of the target population definitely will buy the product.
- (c) There is a 95 percent chance that between 47 percent and 53 percent of the target population definitely will buy the product.
- (d) 50 percent of the target population *probably* will buy the product.

The answer is... none of the above. All that is known is that there is a 95 percent chance that if the target population were asked the same question, in the same way and in the same context, at the same time, then between 47 percent and 53 percent of them would answer the question the same way. That is all the “validity” that statistical validity provides. There is no implication whatsoever to derive from statistical validity that the question itself and the way it was asked truly measure what it is intended to measure. Yet, that is the trap that many people who produce and use marketing research fall into.

There is a comfort in relying on such numbers; they are concrete, measurable, relational to each other and seem to provide a great deal of information based on these properties. And within the confines of statistical validity, these are all true and valuable properties. But that comfort is dangerous — *statistical* validity is very different from the everyday concept of validity, but many people blur the two together.

This inclination can lead people down the wrong path, injecting “validity” into “findings” that have no validity at all. Several years back, there was quite a stir over the results of a poll conducted by a reputable survey organization that indicated nearly one quarter of Americans believe that the Nazi Holocaust may not have happened. People were shocked. How could such ignorance be so widespread in American society? What does this finding say about American society as a whole? Very few people, however, actually questioned the research itself. Upon closer examination, the company that conducted the poll discovered that the survey question contained a double negative and was misunderstood by respondents. A newly worded survey showed that less than 1 percent believe that the Holocaust may not have happened.

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The survey had plenty of statistical validity, but it did not reflect people's true beliefs. Nonetheless, the results initially were given a lot of validity.

The gap comes from the fact that perceptions, values, emotions, memory and other intangible qualities are the key elements we wish to measure in marketing research, but such elements by definition defy — or, at least, resist — quantification. Statistical validity is great if you are measuring certain molecular isotopes in ocean water or the propensity to a certain disease in different demographic segments. In the realm of marketing research, however, the perceptual human factors keep all statistically valid results at arm's length from true insight.

“Validity,” in everyday vernacular and as commonly understood, refers to a quality attributed to that which is considered valid — e.g., being well grounded or justifiable, being relevant and meaningful, based on truth or reason, or being logically correct (derived from definitions in Merriam-Webster, Cambridge and American Heritage dictionaries).

Both qualitative *and* quantitative research techniques can possess validity. Quantitative research can provide validity and insights if the key drivers and important factors are asked about, and if they are asked about in an appropriate way. The same can be said for qualitative research, except that qualitative has some distinct advantages:

- Qualitative research can uncover key drivers and important factors even if they are *not* asked about.
- Respondents in qualitative research can indicate that they do not understand the question or that the question is barking up the wrong tree.
- Certain techniques in qualitative research can reveal how the “human factors” are at work even if the respondents are not consciously aware of them.

Qualitative research also derives validity from the *way* that respondents relate their perceptions and experiences. Qualitative is perfectly tailored to learn about *how* people think about the decisions they make and *why* they choose one option over another. These findings are more than additional valuable insights — they are the basis for finding validity in *all* of the insights.

For example, suppose a software company conducts qualitative research with former customers. In the first market, these former customers relate not only what they like about their new software package, but they also describe how their past experience with the client's product was unfavorable because it relied too much on the use of complex function key input. Then, the research team goes to a completely different market, and again the former customers relate that the complex function key input was a factor in their decision to switch. And then again in another market, and in another.

Guess what? There is validity in that finding; it is well grounded and reasonable that people who have never met or discussed their experiences would relate

the very same experience *and* the same explanation again and again.

In fact, the most insights and the most validity often can be derived from using *both* qualitative and quantitative techniques, not just one or the other. Years ago, there was a famous study conducted for a processed-foods manufacturer that had perfected a cake mix that only required adding water. Homemakers were brought in to blind taste-test the old recipe, which required adding fresh milk and eggs, compared to the new “water-only” recipe. And, in the blind taste test, the old and new recipes were indistinguishable. But then homemakers were brought in to actually react to each product and were asked to taste-test cakes that they baked using the old and new recipes side by side. In this taste test, the old recipe won hands down. Qualitative probing uncovered that making a cake was not making a cake to these homemakers — it was a significant act of caring for their families. Without cracking an egg and pouring some milk, these respondents did not get a chance to put their “love” into the cake, and thus it truly did not taste as good to them. The blind taste test was statistically valid, but it did not reveal the true situation. The qualitative research put the quantitative results into the proper framework. Together, they painted a rich picture that provided true, meaningful insights.

Qualitative and quantitative are not substitutes for each other, although unfortunately they often are considered to be exactly that. A professor of mine in graduate school had a favorite saying: “Which is the leg that causes the stool to stand?” Of course, no leg of the stool is more important than another in keeping the stool upright; they work together to provide something that none of them could do on their own.

In a similar fashion, qualitative and quantitative research often work together to provide the best insights that neither technique alone could provide. To best understand their markets and customers, companies would do well to incorporate qualitative research into their plans as much as possible. Otherwise, they could be left without a leg to stand on.

Parting Thoughts

The publication of this issue of *QRCA VIEWS* coincides with the end of my term as QRCA president. It has been my distinct privilege and honor to represent and serve this amazing group of professionals dedicated to advancing the qualitative research profession. In the past year, we have seen QRCA gain wider awareness in the industry, and we have made important strides in serving our members and in enhancing the profession. I am confident that QRCA can continue this tradition and will work to ensure that qualitative research is used widely, used correctly and helps clients achieve the best insights that address their objectives. 📌