

Blurring the Traditional Boundaries between Qualitative and Quantitative Research

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“What will you see? A meltdown of all traditional boundaries. In the BLUR world, products and services are merging. Buyers sell and sellers buy. Neat value chains are messy economic webs. Homes are offices. No longer is there a clear line between structure and process, owning and using, knowing and learning, real and virtual. Less and less separates the employee and the employer . . . On every front, opposites are blurring.”¹

The traditional boundaries between qualitative and quantitative research are beginning to blur. This is occurring as marketing research moves away from a mass-market orientation into an era of ever more precisely targeted niche markets, particularly business and professional markets.

Origins of the Qualitative/Quantitative Distinction

The distinction between qualitative and quantitative research emerged during the era of mass marketing. Structured surveys were the only practical way to measure mass markets², but as every researcher knows, structured surveys

¹ *BLUR: The Speed Of Change In A Connected Economy*. Stan Davis and Christopher Meyer. Ernst & Young Center for Business Innovation. Reading, Massachusetts: Perseus Books. 1998.

² A few researchers actually used depth interviews on a large scale. The political science classic, *The American Voter*, which examines the role of ideology – or lack of it – in the election of 1956, is a case in point. This daunting effort was based on depth interviews carried out by social scientists from the University of Michigan’s Survey Research Center. They interviewed a large probability sample of voters and then spent many months analyzing the responses in exquisite detail. In fact, the study was not

cannot give you the right answers unless you ask the right questions.

Qualitative methods – such as focus groups, depth interviews and projective techniques – were originally intended to help survey researchers ask the right questions in language consistent with respondents' frames of reference.

Over the years, the original vision of qualitative and quantitative research as complementary methods has steadily lost ground. With increasing pressure to make decisions quickly, many marketers make big decisions, often committing millions of dollars, on the basis of a few focus groups. Increasingly, survey researchers find that project schedules don't allow enough time to conduct preliminary qualitative research and, even if they did, there is always the danger that clients will use the preliminary research to make decisions (often the wrong decisions) rather than waiting for the results of the confirmatory survey research.

Increased specialization has exacerbated this trend. When I started my marketing research career in the early 1980s, senior survey researchers were expected to conduct focus groups and depth interviews as well as to design questionnaires and analyze data. Today, most researchers are identified with either qualitative or quantitative research. Indeed, to join the Qualitative Research Consultants Association, a researcher's professional role "must be **primarily** designing, conducting, and analyzing qualitative research."

published until 1960, four years after the data were collected. Not surprisingly, this approach was abandoned as impractical.

It is very difficult to find a clear definition of qualitative research. This is not surprising. First, the term “qualitative” covers three very different methods – focus groups, in-person depth interviews and depth interviews conducted by telephone. Second, since qualitative and quantitative researchers must compete for research dollars, they tend to view the distinctions between the two methods in ways that confirm their own worldview.

Quantitative researchers tend to define qualitative research in terms of what it usually isn't – projectable. The following passage, taken from an issue of the American Marketing Association magazine, *Marketing Research*³, illustrates this view.

“I offer the following distinction between qualitative and quantitative research: Quantitative research is conducted using samples of respondents selected in such a way that the opinions and perceptions of the sample can be assumed to be representative of the population from which the sample came, and the degree of sampling error can be determined; everything else is qualitative.”

Qualitative researchers, however, stress the mysteries of their art. For example,

³ David Bakken. “State of the Art in Qualitative Research,” *Marketing Research*. Summer 1996, Vol. 8, No. 2.

“We (qualitative researcher professionals) are better able to read people, identify their real meanings, hear the themes and subtext – the texture as well as the substance, the counterpoint, beat, and mood as well as the melody.”⁴

For purposes of this article, we have adopted a simple and, we hope, neutral definitions:

- Qualitative research is research that is conducted by trained depth interviewers or moderators who are free to probe responses and follow up on promising lines of inquiry.
- Quantitative research is research that is projectable to the population of interest.

The terms “qualitative” and “quantitative” are not mutually exclusive. There are several situations in which research can be both qualitative and quantitative.

These include:

- Studies of small populations
- Studies of homogeneous populations
- Studies of highly motivated and articulate populations
- “Funnel” designs

⁴ “Why Use a Professional Qualitative Researcher,” <http://www.qrca.org>

Studies of Small Populations

I first began to realize that the qualitative/quantitative distinction is often more apparent than real some years ago when a power utility engaged our firm to conduct “qualitative” interviews with some of its largest customers. As we started working on the study, we had two surprises. *First*, the client wanted us to collect numeric information (square footage, number of employees, etc.) as well as the attitudinal information that is more appropriate for qualitative studies. *Second*, the entire universe to be studied consisted of just 20 companies. Thanks to the tenacity of a superb depth interviewer, we were able to interview representatives of all of them.

In this case the boundaries between qualitative and quantitative research had not just blurred; they had disappeared altogether. Since our results were based on a complete census of the population of interest, we felt completely confident in summarizing the results (especially the numeric information) on charts. At the presentation, however, we found that we had a lot of explaining to do. One client doubted the wisdom of using means and percentages to present results based on “such a small sample.” Another insisted that research cannot be both qualitative and quantitative.

Since then, we have conducted many studies of small populations in which we have been able to interview a large proportion of the population. These have included CEOs of very large companies, key Congressional aides, presidential

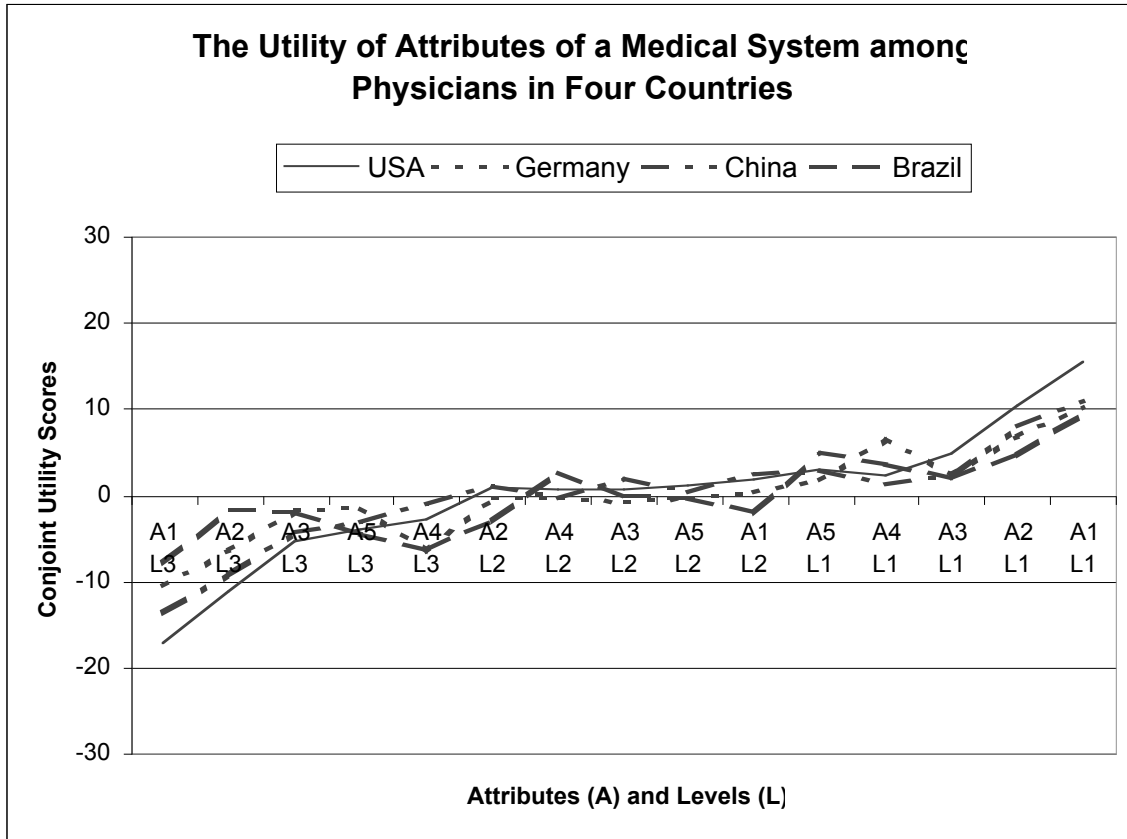
appointees, specialized journalists, top physicians and scientists. Since these populations are small, it is economical make a concerted effort to reach each potential respondent so that the results can be quantified. It also makes sense to use highly trained depth or executive interviewers to conduct the interviews so that they yield not only reliable quantitative information, but also rich qualitative information.

Studies of Homogeneous Populations

The more homogeneous a population, the smaller the margin of sampling error. For example, if sample size is 100, the margin of sampling error is almost 10 percentage points for percentages around 50%, but it is only about 6 percentage points for percentages around 10% or 90%.⁵ This means that researchers can use a relatively small sample when the population of interest is fairly homogeneous.

Today's emphasis on niche markets means that more and more of the populations we survey are relatively homogeneous. For example, professionals schooled in the same discipline often have a common orientation. The chart below is based on a conjoint analysis administered to physicians in the same specialty in China, Brazil, Germany and the United States. It shows that, despite some small differences, the same product attributes are important to physicians in these four very different countries.

⁵ Calculated at the 95% confidence level.



The use of smaller sample sizes to study homogenous populations opens another opportunity to combine qualitative and quantitative methods in an effective way.

Studies of Highly Motivated and Articulate Populations

Business and professional respondents usually know their business and are eager to talk about it. Most prefer individual to group interviews. They do not need the stimulation of a focus group, and in fact, many would not be willing to discuss their business in the presence of their competitors. Since they are

accustomed to talking on the telephone, depth telephone interviews are often just as effective as in-person interviews with this population.

This frees us from some of the limitations of focus groups. If we can conduct individual interviews, we not only have individual measures, but we also do not have to worry about bias due to group dynamics. If we can conduct depth interviews by telephone instead of recruiting respondents to appear at a central location, we can select respondents without regard to geography. Since it is easier to convince respondents to participate in a telephone interview at their convenience than to travel to a central location at an appointed hour, we can also expect to have a more representative sample.

Individual interviews also provide more information from each respondent than do focus groups. In a typical 90-minute focus group session, about 30 minutes is consumed with introductions, warm-ups and questions from the moderator. This leaves about 60 minutes for discussion, or an average of six minutes per respondent in a 10-person group.

“Funnel” Designs

“Funnel” designs use survey research to provide a statistically projectable overview of the population of interest. They then use qualitative research to

focus on particular subgroups, often by re-interviewing selected survey respondents.

For example, a large segmentation study, conducted by telephone using a national probability sample, yielded a cluster of buyers that seemed particularly promising prospects for a new product. Of the 1,000 survey respondents, 75 were members of this segment. Fifty of them were re-interviewed by a depth interviewer by telephone to confirm their interest in the product and probe buying motivations and test preliminary advertising concepts.

The fact that the same respondents were interviewed again provided a clear link between the qualitative and quantitative phases of the research. However, researchers have also used the results of large-scale segmentation surveys to develop screeners to recruit segment members to a central location for focus groups or in-person interviews. Although the link between the qualitative and quantitative phases of the research is not as direct, this method also allows qualitative results to be viewed in a quantitative context.

The “funnel” approach also can be used anytime a survey leaves questions unanswered, or raises new ones.

Conclusion

Increased interest in marketing to small niche markets, particularly among business and professional markets has created new opportunities for survey researchers to incorporate qualitative components into their research. Hybrid designs allow us to give clients the rich texture that qualitative research can provide, but also allows us to view qualitative findings in a quantitative perspective. By using hybrid designs, we also help clients avoid the bad decisions that are the inevitable result of too much dependence on stand-alone focus groups and other non-projectable qualitative methods.