NATURALISTIC ANALYSIS OF QUALITATIVE DATA: ADAPTING SOCIOLOGICAL METHODS TO MARKETING RESEARCH

ROGER A. STRAUS

3/10/2021

PREPARED FOR:

THE Y CONFERENCE
ADVANCES IN QUAL RESEARCH & BEHAVIORAL SCIENCE
UNDERSTANDING THE WHY BEHIND THE WHAT

BLACKSTONE GROUP

FOUNDATIONS

- Objective: find and tell the story (in the journalistic, not literary sense)
  - The Whats
  - The Hows ──┐ Keeping in mind your audience & their needs/interests
  - The Whys ──┘

- Adapting qualitative sociology principles and methods to marketing research
  - "Grounded" → let concepts/findings/hypotheses emerge from the materials
  - "Naturalistic" → getting at what people do and think in their everyday world
  - "Activist" → we are actors not stimulus-response machines; we do things for our own reasons, which are at least in part socio-culturally constructed

- Thomas theorem: "what people define to be real is real in its consequences"

- I have used this methodology for face-to-face and online focus groups, depth interviews/TDIs across industry verticals, also asynchronous/immersive studies.

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# Bottom Line: Discover the Implications for Action

Okay, So What?

- Get at the hows and the whys behind them – not just the whats, whos, whens, how manys

- Harken to the parrot!
  - Clients seek insight and direction
  - Data dumps, quotes, numbers don't suffice

- You need to *find* and *tell*
  - The story
  - Why targets think and act as they do
  - And what it means for your client (the "so what")

Constant Comparative Method: The Original Analog Approach

- **Prep**: make plenty of copies of your notes/transcripts, get out pencils & markers

- **Review**: read through all examples of each respondent segment, ideally section by section of your discussion guide

- **Code**: tease out story blocks (which commonly overlap) identify & label each

- **Cut & Stack**: cut one paper strip for each block, sort them into stacks – one stack per code block

- **Review**: grab a stack, read strips, create a new stack or move to another stack as needed, divide into sub-stacks, repeat over and over until you've wrung it dry

- **Process/Test/Label**: sort, re-sort, evaluate
  - What's the unifying theme or story element for each block?
  - Compare and contrast stacks
  - Reorder. reorganize, keep adding new stacks/sub-stacks for homogeneity
  - Write in analytic, process and/or observational codes/notes

- **Paste**: testing the logic and revising as needed, tape or paste strips into story order (the original "cut & paste")

- **Analyze**: that's your first-level analysis (whats and hows); now go through, tease out and illustrate (with verbatims if you've got them) the whys and so whats using your substantive knowledge and creative imagination
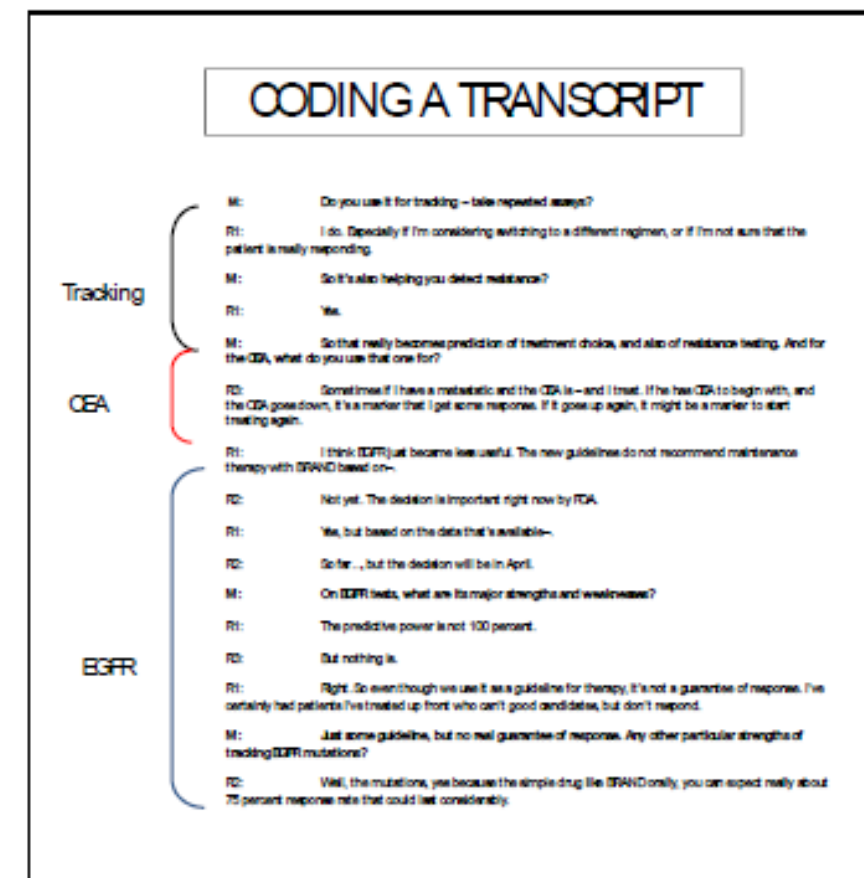
Actual garage setup ⇩
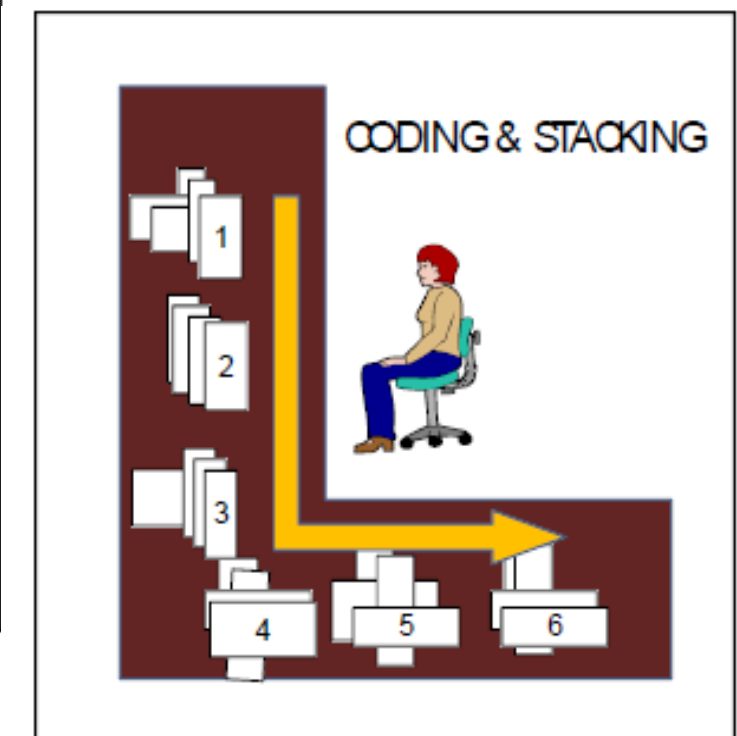
Computer-Assisted Method

Prep:

- Can use any word processing program, Excel (I prefer Microsoft Word)

- Gather transcripts, save two copies of each (one to keep intact for reference, one to work with)

- Create master file (I copy and use my discussion guide body as framework, each section or line of questioning as header on a separate page)

- Always put in page numbers or you can end up with a confusing mess!

- Open multiple windows – at least two, for working transcript/notes and master file

Computer-Assisted Method

Code:

- Read through a transcript, highlighting blocks (suggest you also bold or highlight "keeper" verbatims in a different color), annotate as desired (or just in your mind)

- Go back to working copy of your first transcript, enter drag and drop into your master file
  - I mainly drag and drop verbatims for this but also summarize (be sure to ID source of each quote in parentheses)
  - Create lists, as appropriate with informal counts (e.g., for options/actions/brands or other items)
  - Keyboard in sub-section headers to organize the material – for ease of reference, do this ALL IN CAPS and/or highlight

- Add notes and/or codes, keyboard in summaries, conclusions/implications, reminders to yourself, open questions, any nonverbal observations, etc. – use Comments or just enter in CAPS
  - Don't sweat details like spelling or grammar at this point

- Repeat for all transcripts – if there are key informant segments, consider separate pages with name of segment as well as section in header

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Computer-Assisted Method

Process:

- Process as you go; keep comparing, contrasting, teasing out concepts and story lines
  - Reread, reorder, subdivide, go back and fill in blanks, annotate, add or subtract material, enter notes
  - Over and again until the whole story comes to life and you feel you've covered all key themes and variations

- Put it all into a sequence that lays out the story step-by-step (vs. guide order)
  - Done properly, your key conclusions, insights and recommendations seem obvious
  - "Inverted pyramid" principle works just a well in qual as in survey design
  - Test logic and flow
  - Put miscellaneous bits and pieces in appropriate sections at the end (as clients may have specific lines of questioning that do not fit into the main story)

- Feel free to generate working hypotheses to guide your thinking, but keep checking against the material and let your hypotheses change and evolve – you may surprise yourself
  - Remember the basic grounded theory strategy: let the story emerge

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Computer-Assisted Method

Tell the story:

- Go back and check the proposal and discussion guide to ensure that you are covering all bases as promised and meeting study objectives

- Write the body of your analysis/report from your master slide and then go back and create any front and back sections (objectives, method, sample, Executive Summary/C&R, etc.)
    - Telling the story will almost invariably require a different narrative sequence than the discussion guide
    - If presentation format, have slide headers tell the story with the overall takeaway for each slide as title, key points as headers, evidence as subpoints, etc. (BoozAllen "inverted pyramid" method)
        - Feel free to borrow a trick I learned early on: use the slide headers as bullet points in any Conclusions or Key Findings section of report, consolidating and modifying as appropriate
    - Keep in mind the principle of **weight** – the amount of verbiage/space/verbatims devoted to a topic implies relative importance to the reader
        - Don't fall into the newbie analyst's error of focusing on what's interesting to you vs. what's important to the client and the story, including when selecting verbatims
    - Avoid "analyticus interruptus" – be sure to draw out the whys, so whats, action implications/recommendations, realistic next steps, and, again, ensuring that you have made everything clear & covered all objectives

Fully Computerized Analysis?

- You could potentially accomplish the same basic tasks with coding/qualitative analysis software
  - At the highest levels this could almost completely automate coding and grouping
  - We're beginning to see AI technology that can, in theory, essentially replace the analyst
- Why don't I use it? I've tried over the years but…
  - These programs tend to be difficult to master
  - At least as a novice, I've found they add unnecessary cost, time and hassle
  - I have major methodological and philosophy-of-science issues with automated analysis
  - However, technology may offer significant value in processing truly huge multi-moderator project with an overwhelming amount of material to code and analyze
  - Bottom line: to date, given the types of custom research for which I've been commissioned, I have been able to deliver equivalent (or, I'd argue, more creative and meaningful) analysis to my clients at lower cost and in less time using the computer-assisted method described in this presentation

References

Roger A. Straus, PhD
Mastering Focus Groups and Depth Interviews: a Practitioner's Guide, Paramount Market Publishing, 2019

For questions or further discussion, feel free to reach me at:

Roger.Straus@bgglobal.com

503.974.9922