**DRAFT – NOT FOR PUBLICATION**

## Module 1 – Introduction to Qualitative Market and Social Research

Welcome to the first module in the Recruiter Accreditation Scheme. Whether you are an experienced recruiter or new to the industry we hope that you will find the modules interesting and informative. In this module we will describe and define the nature of qualitative research, the methodologies used in market and social research and the essential part that recruiters play in this process. We will also look at the role of the researcher and the links between research and recruitment.

If you are a new recruiter you fill find there is a lot of new and unfamiliar terminology to learn. Our glossary of terms is available to help you *hyperlink* with an explanation of regularly used terms.

First of all, a few facts about the research sector which you are involved in. It is estimated that the total turnover of the research sector is £4.8 billion per annum, with circa £3 billion of this from core market, opinion and social research activities with a further £1.8 billion generated by wider services such as advisory services and data analytics. There are about 3,000 businesses in the UK which provide the £3 billion of turnover of core market, social and opinion research.

The industry is growing by about 1% per year and employs approximately 50,000 people of whom 30,000 are full-time and 20,000 are part-time. So, who is commissioning all this research? The three biggest users of research are brands who are interested in talking to their consumers at about 30%, the government at about 14% and IT and telecommunications about 10%. Qualitative research represents about 13% of research bought or £400 million. The methodologies used within the qualitative sector are 35.7% groups, 22.7% depths, 17.5% online, 6.9% ethnography, 1.4% mobile and the rest spread across other methodologies. (Figures according to the MRS Annual Survey 2016).

## What is the difference between qualitative research and quantitative research?

In this module we are concentrating on qualitative research rather than quantitative research. However, you will frequently hear the two terms so it is important to understand the differences between the two and how they interlink. Sometimes projects will have both qualitative and quantitative stages. The two types of research are commonly called “Qual” and “Quant” by people in the sector. Research or fieldwork agencies may specialise in qualitative research or quantitative research, or they may have both qualitative and quantitative departments.

Qualitative research is distinctive from quantitative research as it typically involves small numbers of participants and focuses on gaining in-depth understanding about participants’ motivations, attitudes, desires and aspirations through spending time with them in face-to-face, telephone or online environments. Online qualitative research (sometimes called digital qualitative) could take the form of a forum, blog or using an app that has specifically been built for the purposes of the research.

In qualitative research individuals or groups of people (referred to as participants) are interviewed or engaged online, on the telephone or via mobile technologies, to generate in-depth data and insight which helps researchers, and their clients answer questions about “what”, “why”, “where” and “how” in relation to their products, brands, communications or services.

Quantitative research is usually used to address the questions “how many”, “how much”, or “how often”. It uses data from larger numbers of people than qualitative research and is based upon statistical principles. It uses measurable data to formulate facts and uncover patterns. Data can be collected through, for example, opinion polls, questionnaires or surveys and this can be undertaken using interviewers (such as face to face or by telephone CATI). Other examples of quantitative projects are: hall tests where people are asked to try a new product and answer some pre-set questions;- exit interviews at venues such as cinemas, museums or supermarkets where people are asked questions about their experience;- and sending a new product by post and asking people to test it and record their experiences through an online link. The numbers of people involved in these kinds of quantitative projects can be several thousands.

## The lifecycle of a qualitative research project

Traditionally research or insight departments in client companies or planners in advertising, design or media companies were the first line commissioners of a qualitative research study. These commissioners would be researchers themselves or be familiar with the discipline. This is still often the case, however, marketing, finance or procurement departments within large consumer-facing businesses may also be the commissioners. In these cases the commissioners may be less familiar with research as a discipline.

Recruiters have no responsibility for designing project methodologies, although occasionally a researcher may ask an experienced recruiter’s advice on recruitment challenges, incentive levels, the timing of groups, timescales needed for recruitment or ideas on venues. However, the lifecycle of qualitative projects begins well before recruitment and goes on after it. Within this module are the steps involved in setting up a qualitative research project from the researcher’s perspective showing the overall timelines of a project which, depending on the scale, can span six weeks through to a year.

**Step 1:**

Research suppliers tender for projects by writing proposals in response to a research brief issued by a research commissioner. A typical brief will set out a business challenge which needs to be answered by research. For example:

- Brand A has lost 10% of customers in the last year and need to understand why.
- Brand B is launching a new product and wishes to understand whether the product is attractive to its current customer base plus its competitor’s customers.
- Brand C has launched a new website and needs to understand how the new site is being used, and to enhance user satisfaction by improving usability and accessibility.

Research suppliers will create proposals, responding to these challenges, suggesting a programme of research using a variety of techniques, aimed at addressing the objectives of the research, including the costs. Typically the proposal writing phase can take up to a week but can be longer for larger or complex projects e.g. multi-country or multi-phase research.

**Step 2:**

Once a project has been commissioned there will be a briefing or set-up meeting between the commissioner and the selected research supplier. This usually takes place as close as possible to the beginning of a commission and is an opportunity for research suppliers to speak directly to end client commissioners (including relevant stakeholders) and ask for further background.

It will be during this stage that participant requirements will be discussed - this is called the research universe and the research sample. This could include for example the ages, sex or marital status of the required participants. The sample is often determined by what information end clients already know about their target or desired audience, often from data they already have. It is at this stage where all project dates and timings are decided – they are typically based on researcher availability (and fitting in with any other projects that they may also be working on) plus the end client's availability if they wish to attend and/or observe the research.

**Step 3:**

Following the set up meeting recruitment screeners and schedules are created by researchers or they may appoint a fieldwork agency to do this, which may also include booking the venues, participant recruitment and organising the incentives.

The purpose of a screener is to ensure that the right people are invited to take part in any given research project. Before screeners are sent to the recruiters they must be approved by end clients so that everyone is in agreement on the type of participants end clients wish to engage with. It usually takes a few days for screeners to be circulated within client organisations and for sign off to be agreed.

**Step 4:**

Once screeners are signed off recruitment can begin. The length of time allocated for recruitment varies and can be anything from a few days to a few weeks. The time allocated should reflect the difficulty of finding participants but will also be dictated by the already agreed fieldwork dates or when clients require projects to be completed. One or two weeks are typical for recruitment.

Whilst participants are being recruited researchers will be working on creating Pre-tasks, if there are any, and developing Discussion Guides to focus discussions during qualitative research sessions. Whilst not a prescriptive list, generally Discussion Guides outline the overall narrative flow for any qualitative session and the specific questions that researchers wish to ask. Again, any Pre-tasks and Discussion Guides require sign off by end clients.

**Step 5:**

Once participants are recruited if there are Pre-tasks to complete it is the responsibility of recruiters to ensure that participants receive these with sufficient time to complete tasks ahead of any research sessions. Participants are usually given about a week to complete a Pre-task and they can take many forms including shopping for products, keeping a diary or using a particular product.

Fieldwork can take place in more than one geographical location and can often be in multiple locations. On an international project fieldwork will take place in multiple countries (and multiple cities in each country) either in parallel or one after the other. For this reason the length of time for fieldwork can vary but on a UK only project it would usually be completed in one to two weeks.

**Step 6:**

Once all fieldwork is complete researchers will begin conducting analysis e.g. listening back to any audio recordings and analysing any Pre- or Post-tasks before coming together as a team (often there are multiple researchers working on a project) for review sessions. This is where researchers will discuss any themes, ideas and insights and come to conclusions about key findings. Each researcher will feed in their experiences and as a group researchers will agree the findings.

Once findings are agreed research teams will write up client reports and prepare presentations for clients. Again, if a project has involved multiple countries then this will take longer. One or two weeks are usually allocated for the analysis and reporting stage of research projects.

**Step 7:**

The final stage is research debriefs with clients. This is usually a face to face presentation but can be a teleconference/Skype/Google Hangout etc. At debriefs research teams will deliver the findings of research projects to end clients. If there is a quantitative phase of research this typically starts immediately after qualitative client de-briefs, using learnings from any qualitative research to inform subsequent quantitative data collection.

## Project case studies

Below are three research case studies to show the different methodologies researchers may use and how the timings are allocated for each stage.

**Case Study 1**

This illustrates how a UK national public awareness campaign on behalf of a government department would be organised. For instance it could be to raise awareness of the dangers of texting during driving. A series of focus groups are commissioned in which a range of messages and storylines are explored to discover which approach, via which media channel, will prove most powerful in changing perceptions and behaviour.

This is how the project would be broken down week-by-week in agreement between the researchers and their clients.

**Timings**

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| Week 1 | • A briefing meeting between the researchers and the end client to discuss the project scope, the timings and the sample of the population to be recruited.<br>• The researchers prepare a participant screener and a schedule which will be submitted to the end client for approval and sign off. |

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| | • The researcher may alternatively decide to commission a fieldwork supplier to draft the participant screener, organise venues for the qualitative groups and undertake the recruitment. |
| Weeks 2-3 | • The researchers or fieldwork agency will appoint a recruiter(s) and brief them on the aims of the project, the demographics of the sample and the timescales for recruitment.<br>• Recruiters will recruit participants for the project and liaise with the researchers and/or fieldwork supplier if they encounter any problems.<br>• The researchers will draft a Discussion Guide which would be used to structure discussions with participants during the focus groups. The Discussion Guide will not be finalised until the end client has agreed and signed off the document. |
| Weeks 4-5 | • Fieldwork will be undertaken. The researchers will conduct the focus groups. |
| Weeks 5-6 | • The researchers will analyse the findings from the fieldwork and prepare their report for the end client. |
| Week 7 | • The researchers will present their findings to the end client in a face-to-face de-brief. |

**Case Study 2**

An internet provider wishes to understand attitudes and behaviours related to the internet, gaming and social media consumption amongst family members. Analysis of the research findings will allow the provider to run a sales and sign-up campaign using the most appropriate and persuasive 'hooks'. A series of in-home family ethnographic observations and interviews are commissioned.

The timings of the research would be very similar to Case Study 1 but with a longer period of fieldwork due to the in depth nature of the ethnographies.

**Timings**

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| Week 1 | • A briefing meeting between the researchers and the end client to discuss the project scope, the timings and the sample of the population to be recruited.<br>• The researchers prepare a participant screener to recruit participants for the ethnographic research and a schedule will be submitted to the end client for approval and sign off.<br>• The researcher may alternatively decide to commission a fieldwork supplier to draft the participant screener and undertake the recruitment. |
| Weeks 2-3 | • The researchers or fieldwork agency will appoint a recruiter(s) and brief them on the aims of the project, the demographics of the sample and the timescales for recruitment.<br>• Recruiters will recruit participants for the ethnographic project and liaise with the researchers and/or fieldwork supplier if they encounter any problems. |
| Weeks 4-5-6 | • The researchers will conduct the ethnographic research. |
| Weeks 7-8 | • The researchers will analyse the findings from the ethnographic exercises and prepare their report for the end client. |

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| Week 9 | • The researchers will present their findings to the end client in a face-to-face de-brief. |

**Case Study 3**

A leading insurance and pension provider and its advertising agency want to maximise their messaging and media spend. Focus groups, depth interviews and co-creative workshops with older mid-level wealth customers are commissioned. The analysis of the material, especially the exercises in the workshop (drawing 'dream goals' and 'what security means to me') will help position a range of financial products in the 'approaching retirement' sector.

The timings for this project are much longer owing to the various methodologies used and the complex analysis required before the final presentation to the client.

**Timings**

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| Week 1 | • A briefing meeting between the researchers and the end client to discuss the project scope, the timings and the sample of the population to be recruited.<br>• The researchers prepare a participant screener and a schedule which will be submitted to the end client for approval and sign off.<br>• The researcher may alternatively decide to commission a fieldwork supplier to draft the participant screener, organise venues for the qualitative groups and undertake the recruitment. |
| Weeks 2-3 | • The researchers or fieldwork agency will appoint a recruiter(s) and brief them on the aims of the project, the demographics of the sample and the timescales for recruitment.<br>• Recruiters will recruit participants for the project and liaise with the researchers and/or fieldwork supplier if they encounter any problems.<br>• The researchers will draft a Discussion Guide which would be used to structure discussions with participants during the focus groups. The Discussion Guide will not be finalised until the end client has agreed and signed off the document. |
| Weeks 4-5 | • Fieldwork will be undertaken.<br>• The researchers will conduct the focus groups and depth interviews. |
| Week 6 | • The researchers will have an internal analysis session to discuss the key findings from the focus groups and depth interviews.<br>• The researchers would have a meeting or call with the end client to discuss the key findings and confirm the structures and any stimulus materials for the co-creative workshops. |
| Week 7 | • The co-creative workshops will be conducted by the researchers with participants and end clients in attendance. |
| Weeks 8-9 | • Video editing from the video recordings of the research sessions will be undertaken either by the researcher or a specialist sub-contractor. These will usually be included in the final presentation to the end client. |
| Weeks 9-10 | • The researchers will analyse the findings from all stages of the fieldwork (focus groups, depths and co-creative workshops) and prepare their report for the end client. |

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| Week 11 | • The researchers will present their findings to the end client in a face-to-face de-brief including the video output. |

## Getting the best out of participants

With the pressures on research suppliers, fieldwork suppliers and recruiters to complete projects in specific timeframes it is easy to forget that a successful project relies on the willing involvement of committed participants! So let's have a look at how qualitative research generates results through engaging with participants and the personal interactions that happen in a research session.

Qualitative research seeks greater psychological understanding about behaviours, attitudes or aspirations of people and qualitative researchers are experienced in using techniques which maximise honest revelation and the creative exploration of ideas. For participants, due to the in depth nature, taking part in a qualitative research project can be a more intimate, personal and psychologically demanding experience than taking part in some quantitative studies. Qualitative researchers are familiar with techniques to put participants at ease and create as natural an environment as possible so as not to impact on the participant's normal behaviour.

Although clients will have agreed Discussion Guides (which outline the broad discussion topics and flow and highlights the key questions the researcher plans to ask participants) all depth interviews, focus groups, online interviews or forums and certainly all ethnographic studies will reveal open-ended and unplanned data. These can often be the result of (intentionally) enabling individuals or group to 'digress'  or expand on issues when something unpredicted is felt to be more salient, important or influential than the precise issue stipulated by clients. Qualitative studies are by nature more 'free-form' than quantitative studies and from a participant perspective it should feel like being involved in a conversation rather than being fired questions at.

It is an important part of a recruiter's role to recruit participants who will be enthusiastic and eager to take part in the research as well as fitting ever more complex specifications. It is crucial that participants recruited not only reflect the relevant target audience but are articulate and confident enough to have opinions and be able to discuss any specified subject matter for the desired amount of time. If as a recruiter you find it difficult to communicate with potential participants they will probably be not be right for research sessions – even if they buy the right products or use services at the correct frequency!

Feedback from clients will sometimes say that a participant wasn't the right "type" or was so shy or nervous that they had no input into the session. Recruiters need to understand the reasons why projects are commissioned and a full briefing into the aims and objectives of any given project is an invaluable start to recruiting a project. Recruitment is the important first step in putting participants at ease and feeling confident in what is asked of them. It may not be possible to highlight to potential participants exactly what will be discussed or trialled although you should be able to give a broad overview of topic areas. As you become more experienced in recruiting for qualitative studies it will become more instinctive to recognise who will be responsive in a session and be the right "type" of participant.