

A Guide To Qualitative Research Methods

How to select the most appropriate qualitative research method

With so many qualitative research methods to choose from, it's sometimes difficult to confidently select the right approach for your client brief. This guide will help you navigate that choice and make the right decision.



Why do qualitative research in the first place?

In a nutshell, researchers use quantitative research when they want to know how many people are feeling, thinking or doing something. For example, how big a market share is, how many people buy one product over another, or what percentage of the population is aware of a certain brand.

Qualitative research – often referred to simply as ‘qual’ - is altogether different and is used to explain why things are happening or what causes or motivates people to do the things they do. It’s also used to explore subjects and topics, or enrich our understanding of people’s lives and behaviours. It’s even used to test ideas and concepts and to engage people in developing new concepts and products.

So, if you get a brief that is about ‘exploring’, ‘getting insights’, ‘explaining’, ‘refining’, ‘enriching’, ‘deep diving’, ‘testing’, ‘getting feedback’, ‘ideating’ or ‘co-creating’, then it’s likely that qualitative research is the right way to go!

Qualitative research is especially useful when working with niche groups in society, or those with specific experiences that cannot be captured by sampling and analysing general population data.

It is worth saying that qualitative research can be done in isolation, or as a complement to quantitative research. If combined with quantitative methods (typically surveys), qualitative research can be useful either before a survey, in order to identify the issues to be addressed in the survey and the natural language of the people to be surveyed, or after a survey, in order to explain any surprising findings.

When qualitative research is *not* the right approach

It is useful to think about when qualitative research is actually not appropriate or necessary. If the brief requires that you generalise (in a statistical sense) from a sample to a population, or to know about the distribution of opinions, attitudes or behaviours, or to identify causality (in a strict sense), then you will need larger, carefully constructed, representative samples as well as sophisticated statistical methods of analysis. In all such cases, quantitative methods will be necessary.





Which qualitative research methods should I use?

Before deciding on the specific approach you will use, you should consider whether to conduct the research face-to-face or online, because they have different advantages and drawbacks.

Face-to-face research methods - like individual interviews, focus groups and traditional ethnography – are typically better suited when you need to:

- Give a voice to people who are not online
- Explore sensitive issues in relation to which participants do not want to leave 'digital traces'
- Capture body language, facial expressions, spontaneous emotions, etc
- Brainstorm ideas, because of the sheer energy you can get in a room full of people

Digital methods – such as live chats, online research communities or mobile ethnography – are typically better suited if you need to:

- Understand people with rare profiles or real 'communities of interests'
- Overcome geographical and physical access barriers and make taking part easier for research participants, through using their smartphone, tablet or PC
- Minimise the cost and time linked to traditional data collection and analysis
- Manage and systematically analyse large amounts of qualitative data

These are useful rules of thumb but the boundaries between face-to-face and digital methods are not clear-cut. If in doubt, do get in touch and we will be happy to discuss the pros and cons of both approaches in relation to your brief.





Beyond face-to-face and digital, what else do I need to think about?

Deciding which method to apply fundamentally depends on the business and research questions you need to answer. Thinking about the brief and what your client really needs to get out of the research, here are some useful questions to ask yourself:

- Do I need to capture emotions, thoughts and behaviours where and when they occur and to obtain some contextual information ('**in-the-moment**'), or is it enough to rely on people's recall and descriptions of their emotions, thoughts and behaviours after the event?
- Would it be better to capture data over time to give research participants the opportunity to consider the research topic from different angles ('**longitudinal**'), or is it sufficient to have a one-off encounter with the research participants?
- Do I know enough about the topic from the outset to be prescriptive about the questions I need answered, or would it be helpful to be able to make changes during the research process in light of early findings ('**iterative**')
- Do I want to gather individual data from each participant unbiased by their interactions with other people, or am I interested in the effects of group dynamics and social influence ('**interactive**')
- If I do want research participants to interact with one another, is it important that they should talk to one another in real time to benefit from spontaneous group dynamics ('**synchronous**'), or is it better for them to share ideas and experiences with some delays in interactions to give people some time to think?
- Do I need a detailed analysis that highlights differences between social groups based on gender, age, socio-economic groups, country of residence, interactions with products and brands, for instance ('**segmentable**'), or is it enough to have some top-level broad themes?
- Is it important that I can extend or expand my research design to include, say, more research participants, methods, topics, field days, geographical areas or languages ('**scalable**'), or will my qualitative research always remain small in scope?





The table below lists some of the most common qualitative research methods (both traditional and digital) used in the research industry and compares them in relation to each of the questions (or attributes of the method) above. We have also added surveys because, while they are obviously a quantitative tool, this comparison helps bring out the specificity of the other methods.

So, the next time you are commissioning research, or putting together a proposal, it might be helpful to take a quick glance at this table to check that the research design you have in mind will actually deliver the evidence you need.

Attributes of methods Main qual methods	In-the-moment	Longitudinal	Iterative	Interactive	Synchronous	Segmentable	Scalable
Interview (F2F)	No	No	No	No	Yes	No	No
Interview (telephone)	No	No	No	No	Yes	No	No
Focus Group (F2F)	No	No	No	Yes	Yes	No	No
Live Chat (online)	No	No	No	Yes	Yes	No	Yes
Ethnography/ Observation (F2F)	Yes	No / Yes*	Yes	No / Yes*	No	No	No
Mobile Ethnography (online)	Yes	Yes	No	No	No	Yes	Yes
Online Research Communities	No / Yes*	Yes	No	No / Yes*	No	Yes	Yes
Diaries (paper)	No / Yes*	Yes	No	No	No	No	No
Diaries (online)	No	Yes	No	No	No	Yes	Yes
Surveys (online)	No	No	No	No	No	Yes	Yes

***Note:** In a number of cells, you see 'No' and 'Yes'. This is because the answer depends on the research design you chose, rather than on the inherent qualities of the method itself. For example, a 'Live Chat' may be segmentable if you choose to recruit people by categories and keep categories distinct during the fieldwork and analysis, but this is not necessarily the case. Similarly, traditional ethnography may be a one-off affair (e.g. you follow a consumer during a single shopper journey) or a longitudinal affair (e.g. you spend three weeks observing office life to understand how discrimination operates). Or, using online research communities, you can choose some activities to be 'in-the-moment' (e.g. asking research participants to take videos of their family meal) or not (e.g. engaging participants in a discussion or a survey about their family meals). Uniquely, online research communities allow you to decide whether you want participants to interact with one another by setting activities either in private or in public and, if set in public, you can control biases and social influence by enabling participants to see other people's answers before posting their own, or not.





Of course, there are many more qualitative research methods you might wish to consider, as there are other relevant dimensions we could have discussed to distinguish between methods, but we hope this is a useful starting point.

Besides the intrinsic advantages and drawbacks of each method, there are also many project-related factors to take into account, such as the research budget, timescales, the client's organisational culture, the profile of the population under study and so on.

If you found this guide useful and would like to learn more, or if you'd like to speak with one of our team to understand how we would approach your brief, then don't hesitate to get in touch. There are three ways to contact us:

1. Go to go-further.co/contact-us and complete the contact form
2. Email hello@go-further.co
3. Pick up the phone and dial **+44 (0) 20 3515 3301** (UK) or **+1 310 853 6986** (US)



Glossary of qualitative research terms

IN-THE-MOMENT:

Some methods allow you to capture emotions, thoughts and behaviours in real time, others don't. For instance, they can capture research participants as they shop or use a product. Traditional and mobile ethnography, as well as online research communities, are designed to capture 'in-the-moment' data. These immersive approaches help reduce the distortions of poor recall and can provide important contextual data.

[Return to p4](#)

LONGITUDINAL:

A longitudinal method unfolds over time, as opposed to being a 'one-off' research encounter. This is normally done to track changes in people's awareness, knowledge, attitudes or behaviour, by repeating the same questions at specific intervals. However, it can also mean engaging with the same research participants over a period of time to explore a range of issues. All methods can be repeated over time, but some methods – like online research communities or diaries – are specifically designed to take place over several days, so that you can capture change within a single research process.

[Return to p4](#)

ITERATIVE:

A method is 'iterative' if there is scope to review, amend and change course within the research process itself (as opposed to commissioning a new, separate piece of research once an initial piece is completed), in light of incoming evidence. Qualitative research is typically more iterative than quantitative research (once a survey is launched, it cannot be changed) but, in reality, once a client has signed off a topic guide or interview schedule, they will expect the researcher to stick to the agreed plan. Online research communities offer scope to add, amend or remove questions when obtaining client sign off.

[Return to p4](#)

INTERACTIVE:

Interactive methods build on social dynamics to generate data, whilst non-interactive methods explicitly seek to rule out any bias linked to social dynamics. A method is interactive if it is designed to facilitate exchanges between participants, or between participants and researchers, such as a focus group. By contrast, an interview, a diary or a survey all provide individual data, unaffected by other people (except the researcher). Online research communities enable researchers to choose whether they want some research questions to be interactive and others not to be, so that the benefits and drawbacks of social dynamics can be controlled.

[Return to p4](#)

SYNCHRONOUS:

A method is 'synchronous' if interactions between the researcher and research participants occur at the same time and / or in the same place. A telephone interview or live chat occurs at the same time but not the same place, while a face-to-face interview or focus group occurs at both the same time and place. By contrast, online research communities, mobile ethnography, diaries or surveys do not require all participants and researchers to be present either at the same time or the same place. They are therefore 'asynchronous'. If the sample is small, synchronous research (whether face-to-face or digital) can be cost-effective by bringing a group of people together at the same time and place. However, asynchronous research is more scalable and gives participants freedom to take part from anywhere and at any time. It is typically better for 'hard-to-reach' groups or busy professionals.

[Return to p4](#)



SEGMENTABLE:

For many research purposes, it is essential to be able to analyse findings by segments, such as comparing the attitudes, experiences and needs of men and women of different age or ethnic groups, of various types of customers or of people living in different countries. While interviews would be very time-consuming and costly, they can be analysed in terms of segment, as each interviewee can be allocated to a segment. Focus groups are more complex: they normally bring together people who belong to different segments because it would be too costly to do focus groups for all segments. This makes it tricky to analyse systematically the differences between individuals within a focus group. Digital approaches typically make segmentation easier: live chats, mobile ethnography and online research communities platforms all have more or less sophisticated tools for segmentation.

[Return to p4](#)

SCALABLE:

A method is scalable if it can be enlarged or expanded from a small scale to a larger scale while remaining efficient and effective. The scale can refer to different factors: the number of participants, researchers, different research methods and question types, days, geographical areas or languages, for instance, that can be added on without disrupting the research by either lowering its quality or significantly increasing its cost. All face-to-face methods are less scalable than digital ones, and all methods based exclusively on one-to-one interactions are less scalable than those based on group interactions. Some softwares for mobile ethnography and online research communities are only available in English, while others are available in multiple languages. Typically, larger scale enables more valid qualitative data and more robust analysis.

[Return to p4](#)



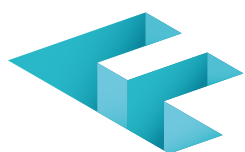


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Further's senior research consultants provide tailored agency training for team members of all levels. We offer bespoke packages that cater to your requirements, skills and capabilities in either half-day or full-day formats.

Training can cover:

- Theory and best practice in online qualitative research
- When to use digital versus face-to-face methods
- Hands-on platform training
- Research design principles
- How to transform your client briefs into digital gold
- Engagement strategy
- How to pitch online qualitative research to clients
- Project management for online qual



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