

# Some Things Can't Be Counted

## Gathering Insight Through Qualitative Research

*By Robin Wedewer | Senior Consultant*



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As a decision maker you owe it to yourself and your organization to expand the sources of information you use to glean insights and make decisions.

Twice a year I face certain disappointment. It happens when the *Grit Report*, the Greenbook Research Industry Trends Report lands in my inbox.

Don't get me wrong. With a global sample of 1,583 completed surveys with researchers from 76 countries, the *Grit Report* is the global research industry's most authoritative look at the state of marketing research. **What I find disappointing is that the majority of decision makers, from organizations big and small, seem to believe they will find the insights they seek only in numbers.**

Here's what I mean. The third/fourth quarter *Grit Report* reported that 62 percent of research work is quantitative and only 33 percent is qualitative. That means that there are two surveys for every qualitative research project conducted during that period.

So what's the problem, you ask?

Here's the problem. Qualitative research is undervalued and underused. There are many, many things important to decision making that we cannot count or describe in numbers. Relying solely on a set of numbers can lull decision makers into a false sense of security.

"But they're numbers! Numbers don't lie!"

Well, sometimes numbers do lie. Sometimes numbers are misinterpreted or just misleading. And a lot of times numbers just don't tell the whole story because they do not provide nuance or context. At the risk of making your blood pressure go up, reflect back on the events of November 2016 when pollsters were criticized for the mistaken "predictions" of the outcome of the presidential election. Numbers alone could not tell the whole story.

As a decision maker you owe it to yourself and your organization to expand the sources of information you use to glean insights and make decisions. This ebook is my appeal for you to do just that. You can also call it my love letter to qualitative research. That's fine too. But I hope to make the case that you should consider research other than surveys. You might be surprised at what you find—or even better, enlightened.

*Robin Maurice Wedewer*  
*[rwedewer@tecker.com](mailto:rwedewer@tecker.com)*  
*(410) 414-5718*

# The Power of Qualitative Research



“It is time to rethink the traditional focus on the member survey and consider how qualitative research can help you understand your members, their lives, what they need and how the association can fill those needs.”

It used to be that qualitative research was largely limited to focus groups, interviews and perhaps some ethnographic studies, if you had the budget and were feeling bold. But the internet has dramatically shifted the nature of research in the past 10 years. Although focus groups, interviews and ethnographic studies are still important qualitative tools, the internet has ignited an explosion of online and mobile qualitative research tools.

These new tools allow researchers more and better ways to gather and analyze information than ever before. Researchers can now reach more people. They can reach them faster. They can reach people who are usually hard to reach. We can peek into the lives and the environments of research participants, go with them as they shop, see what they see, see how they interact with other people and with products and services. These new tools allow us to gather visual information and other richly detailed data. After data collection, new analytical tools help to answer research questions like never before.

**Polls and surveys get all the big headlines, but it is only qualitative research that can address some of the most difficult and important research problems.**

Sociologist William Bruce Cameron said that “Not everything that can be counted counts, and not everything that counts can be counted.” This is true not just in life (think trust, loyalty, honesty), but also in research.

Statistics can't provide answers to every question. The information that comes out of the analysis is only as good as the data that go into the analysis. Even big data analysts are frustrated by their inability to answer questions about the context of all those numbers. For example, it's all so fascinating to see how groups of people cluster around variables such as reading habits, age, opinions about fast fashion and preferences for pears or Hostess HoHos. But who are the people behind these clusters of data and what is the story that this information tells? Why would 72 percent of people pick a HoHo while only 34 percent of people choose a Little Debbie? (I made up those percentages, by the way.)

Without qualitative research, it's all just conjecture about what it means. And without meaning, how do you know what to do with the data?



“You can have the numbers that describe a particular opinion or behavior, but if you don't know the context of the problem you're trying to solve, then the numbers are meaningless.”



“Not everything that can be counted counts, and not everything that counts can be counted.”

- William Bruce Cameron

## What is **quantitative** research?

Quantitative research utilizes various types of surveys to gather measurable data and then uses statistical methods of analysis to provide information expressed as numbers that quantify attitudes, opinions and behaviors that can be generalized about a larger population. Sample sizes in quantitative research are usually larger than in qualitative research.

## What is **qualitative** research?

Qualitative research is exploratory. It utilizes observations, interviews and other methodologies to gather information that describes the qualities and characteristics of people, situations, behaviors, motivations, opinions and ideas that cannot adequately be described with numbers. Data from qualitative research is less structured than quantitative research, but it is richer and more nuanced. Sample sizes in qualitative research are typically smaller than quantitative research.

Qualitative and quantitative research are not conflicting or competing methodologies. Rather, they are different methodologies used for different research problems. Often they are complementary methodologies, used together to create a comprehensive picture or separately, as the research issues dictate.



# The Overreliance on Quantitative Research

**There is a strong bias toward quantitative research over qualitative research.**

We naturally want predictability and certainty when we face decisions. Who doesn't want to minimize risk and maximize the potential for success? So, we try to do that by measuring and weighing. Describing the probability of an occurrence with a percentage gives us a sense of control. Numbers make us feel logical and analytical about things. We even assign a percentage to describe our degree of certainty in situations that can't be measured. "I'll give their relationship a 30 percent chance of surviving the summer." "I'm about 75 percent decided on going to Italy for summer vacation."

Compounding this natural bias for numbers is the fact that technology has allowed us to focus on greater volumes of data rather than on the quality of insight. We can collect loads of data and then dump that data into nifty charts and graphs in a staggeringly long PowerPoint presentation. It all seems so satisfying.

Another reason for the over-reliance on quantitative research is that conducting and evaluating qualitative research can be more complicated.

Almost anyone can write and program a survey using an online survey tool. (We won't get into the problems with quality and pitfalls of amateur research here.)

But good qualitative research requires thoughtfulness, planning, objectivity and careful analysis. Much of what has passed as qualitative research is little more than casual talking with a few people and recounting anecdotes and opinions.

**Although surveys and other quantitative methods offer those reassuring numbers, they have some definite limitations. One of the major disadvantages of quantitative research is the lack of contextual information. Business problems are rarely simple. Customers don't make decisions based on the five conveniently distinct criteria measured with a Likert scale in a survey. The advisability of a go or no-go decision costing thousands of dollars cannot be assured by asking customers their likelihood of buying that product.**

In the real world, customers are influenced by numerous factors, most of which can be difficult to identify and that aren't meaningful when measured in isolation from the other factors.

For example, a survey may indicate that the direction of the profession is shifting in surprising ways. But how do you gauge how people in the profession are responding to that change or how they plan to respond in the near future? There are any number of issues that you could not identify without the benefit of qualitative research. Qualitative research may reveal, for example, that the professionals

are reconsidering their relationships with adjacent professions and expanding those alliances. Or there may be another association that is more actively addressing the shift in the profession. Or people could just be in denial or paralyzed by uncertainty. A survey would never tell you any of this unless you thought to ask.

**Another disadvantage of quantitative research is that it requires a large enough sample of the right people for the results to be valid. Results of a survey with a small sample of the wrong people is worse than no survey at all because the results can be completely misleading or irrelevant.**

Niche associations and associations with small memberships often face this issue. Quantitative research with the 30 members of a trade association is not very useful. A survey of the 250 busy research scientists working in a particular area may yield 25 responses. The data from a small sample just may not be robust enough to be of any use.

Non-member research often falls into this category. It is not only difficult to get non-members to respond to a survey, there is no assurance that the non-members who do respond will be representative of all the people who failed to renew. And uncovering the real reasons for non-renewal—not just the cost and perceived value of membership—takes more than a survey.



**"In the real world, members and customers are influenced by any number of factors, most of which can be difficult to identify and that aren't measurable."**

# When to Use Qualitative Research

There is no one type of research that is right for addressing all research questions. Both qualitative and quantitative research contribute important insights that can support decision making. In many cases, qualitative and quantitative research are used together and at different stages of the research project.

## Qualitative Research Before a Survey

**Qualitative research is useful in the early stages of research, before fielding a survey, to identify and explore the range of opinions, behaviors and ideas on a subject.** This information helps with the writing of a subsequent survey by identifying relevant questions as well as the potential responses to questions—helping to avoid an avalanche of “other” responses that could otherwise have been anticipated. Qualitative research also helps identify the vocabulary and language used about particular topics, which is particularly useful when exploring unfamiliar territory.

For example, before conducting a survey about what Millennials want from the association that will help with their careers, conduct focus groups to gain an understanding of the obstacles and frustrations they face when trying to advance in today’s workplace. Before fielding a survey to non-members about member benefits that they would most value, conduct in-person interviews to learn what problems they face, what resources they rely on now to help address those problems and what their perceptions are of the association. And before rolling out a survey to gauge member satisfaction and quantify areas that need improvement, conduct online focus groups or interviews to explore the member experience, including reasons for utilizing some resources and not others, points of frustration with using current member resources and critical reasons they renew year after year.

## Qualitative Research After a Survey

**Qualitative research can also be used after a survey to help explain confusing, conflicting, surprising or unanticipated results.** For example, if your member survey reveals that 86 percent of members subscribe to another association’s flagship publication, conduct a series of interviews with subscribers to explore what they get from that publication that they don’t get from your association’s publications. If your association’s Net Promoter Score has plummeted since the last member survey, conduct focus groups to discover how members’ work lives and work environment have changed and how their membership experience has changed—or not changed—to keep up.

## Qualitative Research to Explain Complex Issues

**No matter how long or well designed a survey is, there is only so much that numbers can reveal. Qualitative research helps to add depth and context to survey data. There are complex people behind the numbers. Nuance of opinion is lost when those people are described solely with percentages.**

If you are overhauling your association’s membership and dues structure, focus groups with various member types, both from current and potential members, is more likely to yield information about the specific benefits that people want from an association. If you are trying to understand the potential upsides and downsides of eliminating a traditional house of delegates, you are more likely to gain a true understanding of the complex opinions and feelings involved, and thus, sources of resistance, through in-depth interviews than through a survey.

## Qualitative Research to Understand Hard-to-Reach Audiences

Sometimes a survey just isn’t feasible because the pool of potential participants is just too small or too difficult to reach. Trade associations with just a few members often face this dilemma. It is probably meaningless to conduct a survey with fewer than 100 potential participants unless you are assured that all 100 will participate. Hard-to-reach groups, such as cancer research scientists, or those in far-flung locations, such as humanitarian aid workers in the Sub-Saharan desert, are not likely to respond to a survey request in any meaningful numbers. In these cases, it is better to explore topics more deeply with the few people you can reach.

## Use Qualitative Research to:

- Explore
- Reach hard to reach audiences, such as physicians, academicians, technology experts
- Understand why
- Understand the range of ideas and opinions on an issue
- Help solve a problem
- Brainstorm possibilities
- Describe and understand behavior
- Understand customers’ or members’ lives and work

# Today's Qualitative Research Toolbox

Association executives today still want information and insights. But increasingly, they are searching for ways to become immersed in their members' worlds, to see things the way their members see them and feel things the way their members feel them.

These methodologies are just some of the qualitative options that associations can use to understand more about members and their worlds.

## In-Depth Interviews

In-depth interviews, either in person or by telephone, have always been important part of the research toolbox. But now, researchers are using technology to augment the interview experience. Webcams allow the interviewer and participant to see each other. The interviewer can see body language and facial expressions that give clues to how the participant is feeling. Screen sharing allows the interviewer to show various stimuli as part of the interview. This is particularly useful for usability testing, creative testing and for sensitive topics the participant may be reluctant to be candid about. And the final report can incorporate audio and video recordings to provide more

richness and depth to the reporting of findings.

### Examples:

- Interviews with CEOs or senior-level decision makers to understand why they do or don't pay for association membership dues
- Interviews with healthcare educators about how patients react to and comply with strict dietary recommendations and what strategies are most effective
- Interviews with chapter leaders about proposed changes to policies that could impact chapter membership

### Benefits:

- Interviews allow in-depth exploration of all the topics with each participant.
- The flexibility of one-on-one scheduling makes participants more likely to take part in the research.
- Sensitive topics can be more easily addressed in the intimacy of a one-on-one interview situation.
- Some executives and senior-level professionals are more likely to participate in in-depth interviews

than in group discussions, such as focus groups.

- Interviews can take place in the participants' work setting or in a dedicated focus group facility.
- Interviews conducted by telephone or by utilizing webcams eliminate the time and expense of travel.

### Considerations:

- Interviewing specific people requires extra time for scheduling.
- Technology-enabled interviewing requires participant screening for equipment operation and compatibility.

## Traditional Focus Groups

Traditional focus groups bring together eight to 12 people and a moderator for a one and a half to two-hour discussion in a focus group facility or other location, such as a hotel or office conference room. Dedicated focus group facilities with one-way mirrors allow unobtrusive observation and audio/video recording of the discussion. Many facilities are now equipped with cameras to allow for remote real-time client observation of focus groups over the internet.





### Examples:

- Focus groups with lapsed, new and long-time association members to explore reactions to alternative new member benefits bundling packages
- Focus groups with members to gain an understanding of how the economy has affected members' daily work lives, the problems they face and explore ways the association can help members through difficult times
- Focus groups with non-members in related professions to explore the feasibility of expanding association membership into adjacent markets

### Benefits:

- The interaction among participants often yields additional insights as participants build on or respond to the comments from others in the group.
- Association staff can observe the focus groups in real time using a focus group facility with a one-way mirror.
- Focus groups are excellent for evaluating products that require handling or physical interaction.

### Considerations:

- The logistics of bringing people together to a single location at a particular time can be complicated.
- Travel expenses, facility rental and other expenses increase the cost of the research.
- Sometimes people do not show up as promised. Usually, you will need to recruit more participants than you expect to actually show.
- You may need to incentivize participants to ensure that they show up.

### Dyads, Tryads and Mini Focus Groups

Dyads, tryads and mini focus groups are similar to traditional focus groups, but have fewer participants—two (dyads), three (tryads) or four to six (mini focus groups). They take place over a one and a half to two-hour timeframe. With fewer participants researchers can leverage the conversational aspects of focus groups. Fewer participants means each participant has more time to talk. As a result, the conversation can be much more in-depth and exploratory about each individual's experiences and motivations.

### Examples:

- Small group discussions to explore the member journey from awareness to the current member status
- Small group discussions with technicians about potential problems with new industry policy guidelines drafted by the association's standards group
- Small group discussions with industry leaders and current university faculty to develop recommendations for a curriculum to better support the needs of the industry

### Benefits:

- Small groups are more intimate and comfortable for some people, encouraging them to be more open and candid with their responses.
- Small groups are especially useful for business audiences, technical and complex topics or for mapping decision making processes.

### Considerations:

- With fewer participants it is important that everyone recruited shows up. More follow-up and incentives may be necessary.

### Webcam Focus Groups

Focus groups can take place in a virtual focus group room using webcams. Participants can see each other and the moderator as the discussion takes place. Utilizing the online environment allows for sharing of video or images as part of the discussion. Groups are usually small—four to six people—and last about 60 to 90 minutes. Technology allows for screen sharing and polls of participants.



**Association executives today still want information and insights.** But they are increasingly searching for ways to become immersed in their members' worlds, to see things the way their members see them and feel things the way their members feel them.

### Examples:

- Webcam focus groups with association volunteers to understand why they resist using the association's online portal for volunteer reporting and management
- Webcam interviews with young professionals to gauge reaction to a new member social media campaign

### Benefits:

- Webcam focus groups are perfect for geographically-dispersed participants. People can participate from the comfort of their own home or office.
- They eliminate the time and expense of travel for participants and organizers.

### Considerations:

- Participants must have appropriate computer and webcam equipment and be comfortable conversing in this format.
- Technology-enabled interviewing requires participant screening for equipment operation and compatibility.

## Telephone Focus Groups

Telephone focus groups are a flexible way to bring together five to seven

people for a one-hour discussion led by a moderator. Groups can be facilitated using standard conference call technology with audio recording or with more sophisticated conferencing services that allow for identifying speakers, muting and unmuting.

### Examples:

- Telephone focus groups with young professionals to explore feelings about networking opportunities at the association conference
- Telephone focus groups with chapter presidents to explore ideas for education-in-a-box contents

### Benefits:

- Telephone focus groups are perfect for geographically-dispersed participants.
- People can participate from the comfort of their own home or office.
- They eliminate the time and expense of travel for participants and organizers.

### Considerations:

- Due to the time limitations the topic must be tightly focused and the discussion carefully managed.

## Online Focus Groups and Bulletin Board Focus Groups

Specialized online research applications allow researchers to conduct focus groups online, either in real time or asynchronously. Real time focus groups involve fewer people, usually about six to eight, over a short period, usually no more than 90 minutes. Bulletin board focus groups can last as long as a day and can stretch for several days or even weeks, depending on the needs of the project. In bulletin board focus groups as many as 20, 30 or more people can participate, logging on at their convenience to read and respond to questions in threaded discussions. Today's online focus group tools allow for in-group polls, sharing of images, video and websites. Focus group participants can reply in writing or by recording a video response.

### Examples:

- Multi-day bulletin board focus groups with members in academia to discuss needed changes in the profession's core curriculum
- Online focus group with students to generate and explore new student contest ideas



### Benefits:

- People from dispersed geographic locations can participate in the same discussion.
- The written form of the communication usually yields a detailed and rich transcript.

### Considerations:

- Real time focus groups are often fast-paced and demanding both for the participants and the moderator. Because of this, they must be short, usually about an hour and no more than 90 minutes.
- Participants must be able to express themselves in writing. Professional groups are well-suited for this type of communication.
- Real-time focus groups will require good typing skills for participants to keep up.
- Bulletin board focus groups that extend over several days may require some incentive for participants to commit to full participation for the duration of the discussion.
- Participants must have good internet connectivity. Online research may not

be the best choice for countries with limited bandwidth or unpredictable connectivity.

### Ethnography

Ethnographies use observation combined with in-depth discussion in a natural setting, such as participants' offices, homes or even in a trade show or store. Participants are recruited prior to the observation. The researcher then observes the participant going about their natural activities for several minutes, hours, or even days, as unobtrusively as possible, taking notes about what the participant does, how they do it, what resources they use, etc. The researcher may take photos or video as part of the observation. Usually the researcher interviews the participant post-observation to explore why a person did what they did, what they were thinking or feeling. Ethnography reveals both context and detail that would be difficult to replicate with other types of research.

### Examples:

- Observations and interviews of trade show attendees on the floor
- Observing members' use of technology at work

### Benefits:

- Observation can reveal behaviors that even participants might not be aware of. Ethnography reveals what people really do versus what they say they do. It identifies hidden problems and needs that lead to real breakthroughs.

### Considerations:

- Recruiting can be difficult in business environments due to security and confidentiality considerations.
- Ethnography studies can be time consuming and expensive.
- Ethnographic research requires specialized skills on the part of the researcher.

### Self-Ethnography

Researchers are leveraging the email, text, cameras and specialized apps on smart phones to capture in-the-moment and on-the-location information that can provide a peek into what members are seeing, experiencing and feeling.

### Examples:

- Trade show attendees can be prompted to take photos of confusing signage, favorite booths, areas where they encounter bottlenecks or other frustrations.



### Benefits:

- In-the-moment and on-the-location research yields detailed insight into participants' experiences.
- Captured video tells a compelling story that is difficult to replicate in a traditional narrative report.

### Considerations:

- Participants must have appropriate mobile devices, compatibility and comfort using technology.
- Ensure that expectations for participation are clearly communicated during screening.
- More time and care in screening participants is needed.
- Incentives may be needed to ensure participation.

### Communities

Special communities of individuals can be created for a longer-term project or ongoing research utilizing a specialized research application similar to a social

media-type platform. Community members are usually pre-qualified and invited based on demographic, psychographic or other data. Often communities have quotas for people with different profiles, such as heavy- or light-users of a particular product or service. Community members are asked to commit to participating at certain intervals and in certain ways, such as logging on once a week or completing three assignments a month.

### Examples:

- A temporary non-member patient community to explore issues around care and treatment

### Benefits:

- The unfolding dialogue between participants can be quite revealing.
- Communities are an excellent method of establishing rapport with and between participants, which in turn encourages them to be more candid in their responses.

- Communities are particularly useful for longitudinal studies or for iterative studies that require participants to refine, evaluate and build on ideas over time.
- Communities are excellent for getting qualitative and corresponding quantitative data from the same group of individuals.
- The flexibility of most community platforms allows for conversations, questions and answers, image and video uploads, polls, homework assignments, projects, diaries—the possibilities are nearly unlimited.

### Considerations:

- The participants' long-term commitment usually requires periodic incentives to keep them actively engaged over the duration of the project.
- Permanent or very long-term communities often need to be refreshed periodically with new participants.

### Consider alternative methodologies.

Qualitative research is more than just focus groups and interviews. Technology can add real value to your project, including photos and video that help tell a story.

### Have a thorough understanding

of the research objectives and evaluate all discussion guides against those objectives.

### Avoid bias by working with an outside researcher.

Engage someone skilled at qualitative research as soon as possible.

## Five Top Tips

### Allow enough time

for the project, including thoughtful development of discussion guides, recruiting, interviewing, analysis and reporting. Qualitative research shouldn't be rushed.

### Make sure you are talking to the right people.

Take the time to recruit participants that exactly match your research objectives. Use incentives to encourage participation.



## How Many Do We Need? Figuring Out Sample Size

Unlike surveys, qualitative research doesn't usually involve large numbers of participants.

The number of participants in your qualitative research should be enough that you have reached the full range of ideas and perceptions on your topic. The rule-of-thumb is to talk with enough people that you begin to reach saturation. When you're hearing things you've already heard before, more research probably won't add significantly to your understanding of the issue. Your researcher can help you decide the right number of interviews you can expect based on your project needs.

If your topic is large and complex, you'll need to talk with more people. If your topic is narrow and simple, you can talk with fewer people. A series of 20 in-depth interviews or two focus groups involving fewer than 18 people may be all you need. But if you have multiple segments of people you want to talk with, your numbers will be much larger.

# Ensuring the Credibility of Qualitative Research

The first step to ensuring qualitative research credibility is to identify and minimize or eliminate potential biases that could influence the research findings.

Bias comes in many forms. **One potential source of bias is with the researchers themselves. The closer a researcher is to the research questions or problem, the greater the potential for bias, either conscious or unconscious.** It is natural for staff members well informed about an association's position and internal discussions to carry that information into the research situation and to interpret what they see and hear in light of their knowledge and experience. For this reason, it is even more important to work with researchers outside the association on qualitative research projects.

There is also potential bias in sampling. The researcher must take care in selecting participants for interviews, focus groups and other qualitative research to ensure that they are not the usual suspects the association already hears from on a regular basis.

Members who are at the fringes and rarely or never heard from and members from different segments of the membership should be represented in the sample. For example, research for a specialty physicians association with five groups of subspecialists should have appropriate numbers of participants from each of the five subspecialties. The exact numbers in a small sample do not need to be exactly representative of the membership, but the sample should be reflective of the composition of the membership.

Once the research is underway, the researchers must document the process, who participates in the research and what they had to say. The researchers should take care to ensure a common understanding of problems and vocabulary with participants. They should also clarify and explore details to fully understand issues, behaviors, opinions and ideas and to ensure the researcher fully understands what participants have to say. Verbatim comments from participants should be available to support identified themes, findings and conclusions. And the final analysis should include discussion of both areas where participants are similar as well as how they differ.

**Finally, the more important the decisions, the more robust the research findings should be. In high stakes decisions, survey research is often used to quantify the findings of qualitative research.**

# Why Go Pro

**Qualitative research is a skill that the researcher learns and fine-tunes over time through experience and training in research methods and the study of sociology, psychology and other disciplines.**

Utilizing staff members to conduct qualitative research inserts potential bias into the project. Regardless of how benign the subject of the qualitative research, people who work inside an association are naturally influenced both in subtle and in strong ways about the nature of

the research problem, the decisions that must be made based on the research, the appeal of potential solutions and even how it could impact them or the people around them. Qualitative research conducted by people with a vested interest in the outcome is fundamentally flawed.

Participants in qualitative research may be more open and honest talking with an outside researcher rather than someone on the association's staff. An outside researcher can also assure the confidentiality of responses to sensitive questions.

The professional researcher adds significant value to the research by providing counsel on best methods, logistics and resources. But most importantly, the professional researcher is experienced with analyzing the unstructured data from qualitative research, and providing the perspective and counsel about what the information means, the implications.

Finally, this type of research and analysis can be time-consuming and difficult for an association staff person to work on in addition to their existing responsibilities.

## Want to Learn More?

We would welcome the opportunity to talk with you about your member or other stakeholder research.

*Contact:*  
Tecker International, LLC  
Tecker.com  
Phone: 215.493.8120  
Email: [info@tecker.com](mailto:info@tecker.com)

*Or:*  
Robin Wedewer  
Senior Consultant  
Phone: 410.414.5718  
Email: [rwedewer@tecker.com](mailto:rwedewer@tecker.com)



*More of Robin's ebooks are available at [www.tecker.com/about/meet-the-team/robin-wedewer](http://www.tecker.com/about/meet-the-team/robin-wedewer).*



### **Qualitative research is a skill**

that the researcher learns and fine-tunes over time through experience and training in research methods and the study of sociology, psychology and other disciplines.

