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BEST PRACTICES

Quantitative and qualitative research design primer

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Using both quantitative and qualitative research

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When it comes to capturing and uncovering deeper and more meaningful insights, best practice is to leverage a combination of both quantitative and qualitative research practices.

But for those of you who are new to either — or both — methods, the challenge is knowing how to utilize them effectively and most importantly: when.

In this short guide, we'll provide you with the foundational knowledge you need to create effective quantitative surveys and carry out useful qualitative research. This includes everything from quantitative question design to qualitative research methods and how to use them.

Quantitative survey design, a primer

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Quantitative survey design, a primer

In this section, we're going to cover four things: asking the right questions, correct wording, providing applicable response options and methods for quantitative survey design. Whilst these items are by no means exhaustive, they do provide a foundation for excellent survey design.

WHY IS SURVEY DESIGN SO IMPORTANT?

Surveys are instrumental in gathering valuable information, whether they're online, offline, via the phone or paper-based. And thanks to the rapid development of modern technologies, every company across the globe can access scalable survey tools to gather quantitative data.

But with any rapid expansion of capability, it's vital that you continue to execute the function — in this case, the survey — correctly. Small survey problems that were previously difficult to spot become infinitely more apparent when you distribute them at scale, and for brand's today, there's nothing worse than delivering something that completely misses the mark.

This is why survey design is so important. A clear strategy and framework for your survey ensures you create questions that are useful, inclusive, unbiased, explorative, engaging, accessible, and representative.

Let's talk about developing your questions.

DEVELOPING QUESTIONS

Survey data is only as good as the questions that generate it, so pay attention to the details of what you're asking. Question design is a multifaceted process — there are several ways to ask the same question, and how those questions are asked can often influence the range of responses you receive. This becomes considerably more challenging when you utilize methods such as Likert scales or multiple-choice answers.

Start with the topics you want to cover

As such, when it comes to developing your questions, the first step is to identify the topics you're going to cover. For example, if you want to look at the product experience, e.g. how your customers and employees feel about the solutions you provide, you might want to include questions about accessibility, usability, performance, nice-to-have features and functions, pricing and so on. It's best that you group similar questions together so that respondents are aware of the themes and aren't mentally 'jumping' from one concept to another.

It's often helpful to begin your surveys with the questions or topics that your respondents might find most interesting. Further to this, if you're conducting trend research and analysis, you'll want to record responses and revisit them later to see how your actions have driven change.

Choose the right question types

Here you'll want to consider open and closed-ended questions, as well as rating scales.

Open-ended questions ask respondents to answer on their own terms, giving them much more flexibility and freedom of thought. Closed-ended questions ask a respondent to tick or select from a provided set of predetermined answers.

Now, both options have their advantages and disadvantages — open-ended questions allow the greatest variety of responses, but are more time-consuming to ask and require more work to analyze.

Closed-ended questions, when well designed, ensure respondents interpret questions the same way and give some consistency. The answers are less varied, but easier to analyze. The best approach is to utilize a mixture of open and closed-ended questions to get diversity of thought but also answers you can quickly assess and report on.

Interval scales (or Likert scales) are typically used to assess attitudes and sentiment, giving the respondent a 'range' — either numerical or 'textual'. For example, 'How satisfied are you with the service you received on a scale of 1-5?', 1 being very unsatisfied, 3 being neutral and 5 being very satisfied. If it were a 'textual' scale, the numbers are removed.

Ensure points on your rating scales are clearly labeled with unambiguous words, and try to write questions so that both positive and negative items are scored 'high' and 'low' on a scale. The order response categories are presented can also influence how respondents answer, so consider randomizing or rotating response options where possible.

General rules for writing questions

Typically, the ideal question satisfies these requirements: it measures the underlying concept that you want to explore, it doesn't measure other concepts, and it means the same thing to every respondent. This is a clear and concise question.

Here are a few rules to follow:

+ **Avoid jargon and technical terminology.** This one's simple. Ensure you use language that's easily understood — or better yet, commonplace.

+ **Avoid complex sentences.** Keep your questions short — no need for lengthy, throat-clearing asks.

+ **Avoid vague or imprecise terms**. Use terms that mean the same thing to everyone.

+ **Define things specifically.** Rather than simply asking someone what their income is, a better question would be to ask them their total household income before taxes in a certain year.

+ **Avoid double-barreled questions.** Questions should measure one thing. Double-barreled questions make it difficult to determine what people are responding to.

+ **Make sure your scales are ordinal.** When we talk about ordinal scales, we mean that points are higher or lower for everyone. For example, in a scale that includes 'a lot' and 'many', it's not clear to everyone that 'a lot' is more or less than 'many'. Instead, you might consider a scale like this: 'a lot', 'some', 'a few', and 'none at all'.

For more on survey question design, best practice and creating effective surveys, we recommend you read our handbook: *The Qualtrics Handbook of Question Design*

Now, what about qualitative research?

Qualitative research design and best practices

Qualitative research design and best practices

While quantitative design measures user behavior in a quantifiable way, qualitative research focuses on the quality or meaning — the "why" behind responses. In this section, we'll cover the fundamentals of qualitative research design, including why it's important, established methods and best practices.

WHY IS QUALITATIVE RESEARCH SO IMPORTANT?

If quantitative research tells us the "what", qualitative research tells us the "how" and the "why". It enables a deeper understanding of experiences and context. It allows us to ask questions that are difficult to categorize numerically so that we can understand responses on a more authentic level.

An easy way to describe qualitative research is depth rather than breadth. Its methods are exploratory by design; they seek to unearth the opinions, thoughts and feelings of respondents, and to that end it's most commonly used to support product development, market assessment and research, theories and new concepts.

Let's talk about the most common established methods for gaining qualitative insights.

MOST COMMON QUALITATIVE METHODS
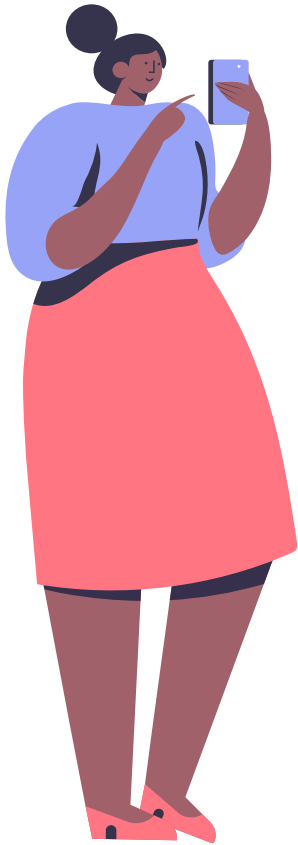
+ Moderated focus groups. Through focus groups, you can generate guided discussion around the topics of your choice. The moderator starts the discussion, but allows the respondents (or participants) to construct the conversation, providing real-time insight. The moderator's role is to ensure the conversation stays on track and is relevant, whilst also probing for deeper insights where possible and appropriate.

+ Moderated discussion boards. Similar to focus groups, discussion boards are useful for collecting dynamic data. Much like an online forum, researchers can prompt a topic for discussion, and users or respondents can input into it. This is a more interactive way to generate qualitative data, and allows researchers to have as much or as little input as required. This method can recruit participants from any type of panel — 3rd party, customer list, community, custom panel and so on.

+ Video survey responses. Another great method to acquire good qualitative research is through video feedback. As our lives become increasingly digital — partly in response to the pandemic — it's critical that organizations have a way to reach respondents at scale to generate authentic qualitative insights. With video feedback, respondents can submit video responses to survey questions in their own time through a format that they're familiar with, and no moderator is required.

+ **Ethnographic research.** Ethnography is a study through direct observation of users in their natural environment. The objective of this type of research is to gain insights into how users interact with things in their natural environment. Methods include direct observation, diary studies, video recordings and much more.
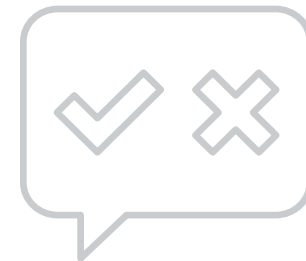
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+ **Set goals.** What are you hoping to learn or achieve? What's the problem to address or explore? Clearly outlining the goals of your qualitative research will help you to formulate the right questions and choose the most effective research method. Establishing your 'outcome' will also help you to select the ideal sample for the study.

+ **Choose the best method.** As mentioned above, thinking about the outcome of your study will help you to choose the best method to capture that data. For example, while interviews might seem like an obvious (or foolproof) choice, your area of research could benefit more from discussion boards or a moderated focus group. Or what if you want to ensure the authenticity of results at a higher level? Perhaps you should consider ethnographic research.

+ **Eliminate bias.** From errors in data collection and racial prejudice to allowing participants enough time and accurate reporting, there are plenty of ways for bias to creep into qualitative studies.

With this in mind, it's important to put in place processes to not just eliminate bias but enable respondents to feel comfortable in sharing their point of view.

+ **Use open-ended questions**. Qualitative research is all about drawing out deeper ideas and feedback from participants. This means asking questions that allow for more than a simple yes or no response.

Maintain an open dialogue — empower participants to share their point of view so that they can fully express their ideas and emotions.

Using audience management
to support research

Using audience management to support research

Evidently, when it comes to using panels for research and quantitative and qualitative research best practice, there's a lot to consider. This guide is but a primer, created to provide you with a foundation from which to grow and improve from.

Throughout this guide we've shared several resources to empower you to create your own panels, choose the right third-party vendors, and develop and deliver effective surveys.

But if you want help managing all of the above, we're here.

At Qualtrics, we've developed an independent solution for panel creation, design and management. The Qualtrics Audience Management Solution.

With Qualtrics Audience Management, you can build panels and communities of customers, website visitors, and/or employees to facilitate agile research. It uses Experience ID — a centralized repository of all customer and employee data — to automatically set up the list of your panel.

Fundamentally, the purpose of the Audience Management Solution is to drastically reduce time to insights by supporting ad-hoc research, streamline the construction of accurate and useful panels, and empower organizations to build rich customer profiles — with a single data warehouse for every customer interaction.

Ready to get started?

If you want to learn more about Digital Qualitative Insights and how it can take your research using panels and survey design to the next level, check out Qualtrics DesignXM today.

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