

The Future of Market and Social Research is Qualitative

Developing professional qualifications for qualitative researchers

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ESOMAR is the global voice of the data research and insights community, representing a network of 35,000 data professionals.

With more than 4,900 members from over 130 countries, ESOMAR's aim is to promote the value of market and opinion research in illuminating real issues and bringing about effective decision-making.

To facilitate this ongoing dialogue, ESOMAR creates and manages a comprehensive programme of industry specific and thematic events, publications and communications, as well as actively advocating self-regulation and the worldwide code of practice.

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Preface

Once clients have analysed all their Big Data, they are still going to need answers to the question 'why?' As Big Data replaces more and more quantitative surveys, the future of MR really is going to be more focussed on qualitative and observational research.

So, how can the MR Industry really take 'ownership' of this space, and not be muscled out by consultants, and DIY entrepreneurs/individuals? We know that much current qualitative practice is poor, especially in developing markets, lacking cultural understanding and real actionable insight. Clients complain of the lack of credibility of the results. CEO's don't know how to use them. We believe that the industry can only claim ownership by acting now to ensure quality through recognised professional qualifications.

We missed the opportunity decades ago to carve out exclusive professional accreditation and standards for the industry as a whole. Let's learn from our mistakes and establish now a proper, recognized qualification system for qualitative researchers, at this key point in time when the whole purpose of the research industry is changing radically.

This paper describes a potential global training and accreditation approach, and recommends that the Industry takes it seriously, to establish the new, unique brand purpose for MR in the digital, data-driven world: *to put the 'human' back into Big Data*.

Introduction – Observing the growing importance of qualitative research

To explain Big Data

It has always been a matter of amazement to dispassionate observers of life how much of business practice is subject to the fashion of the time. In the past we have been through the pursuit of 'Process Excellence', and blithely followed mantras such as 'The Customer is King', 'Focus on 'Core' business', and (contrarily) 'Diversify or die'. Outsourcing, Scalability, Employee Satisfaction, CSR, 'Living the Brand Promise' and other 'stories' of the moment, have all been promoted (by management consultants, media and business 'gurus') as the answer to life, the universe and everything profitable. The current fashionable business 'obsession' is with Big Data and Innovation, and, of course, AI and automation.

Every business that is struggling in the new digital world is busily attempting to transform itself into a 'data-' or 'innovation-' or 'technology-' driven organization if it wants to appear responsive and modern to its shareholders, and to prove that it is in no way moribund and/or dying in the face of the new 'disruptive' competition.

The 'mantra' accepted by commercial companies everywhere over the past few years has been that 'Big Data' will answer all their business, channel and customer issues, *will definitely replace the need for market research surveys*, and give smart companies a real competitive advantage.

However, as with all 'simplifications', there is much more to it than that. There appears to be little realization that once clients have analysed all their 'Big Data' – then, even if it does reduce their need for quantitative surveys, they are still going to need answers to the question 'why?'.

After all, correlations cannot replace real understanding of human behaviour. And we (should) all know that correlation does not imply causation. Anyone who has laughed out loud at Tyler Vigen's book *Spurious Correlations* should know, in any case, and yet businesses persist in this almost religious belief in Big Data.

To define sustainable actions in social research

Also, in the non-profit sector, where quantitative data (known as M&E: Monitoring and Evaluation) has long been the 'only' acceptable data for donors, (because it's accepted wisdom that donors don't like to pay for research), the realisation is growing that good effective solutions require insights from great qualitative research – otherwise development aid money is easily wasted on actions that are neither sustainable, nor what the beneficiaries want or appreciate. There are many books and stories of how aid money has been wasted, with no long term benefit.

To understand culture and other aspects of behavior in developing markets

And it has always been the case that, whilst ESOMAR's Global Report (2017) gives the market share of Qualitative at only 16 % of the total global MR market, this is very much a game of two halves: Western European Countries having a share of 10% and lower (e.g. Germany, UK, France and Sweden), and fast developing countries such as China, Kenya, Nigeria, Brazil, Somalia, Azerbaijan, Guatemala... having higher shares of 20-30+%. This surely indicates that where clients are unsure of culture and markets, they do relatively more qualitative research.

Leading to a greater focus on qualitative, ethnography and observational research

The authors believe that all of this taken together, (the current over-reliance on Big Data, and the growing need for qualitative research in the developing markets and non-profit sector), means that the future of MR *really is* going to be more focussed on qualitative, ethnographic and observational research.

But what about the issue of quality?

Then the question of quality arises. There is a lot of anecdotal evidence that the quality of qualitative research can be very variable – especially in the developing markets. After all, anyone can set up to be a qualitative research company – people watch a (perhaps not very good) focus group discussion and think '*I could do that*' - and the very next week they are set up in business. So, how are we going to train qualitative researchers to deliver the quality and volume of insights that is going to be required?

How do we avoid the MR industry becoming just another offer on the market, without a USP or brand promise, or anything to really differentiate us from the unqualified and inexperienced?

How can great qualitative researchers be developed?

It's relatively straight-forward to train in the *basics* of qualitative moderation and analysis – a week or two in the classroom, and some practice can do that - though there is probably too little teaching of the theory and psychology behind the practice, these days. However, it's the next steps that are really difficult. How can qualitative researchers obtain the expert coaching they require to accelerate their understanding of how to identify insight and improve action planning and decision making, especially in developing markets, where there isn't always the expertise to train them, or the willingness to invest in training. There are plenty of expert qualitative researchers in developed markets who are willing to help, but the qualitative researchers requiring training are generally far away in emerging markets. It is clear that some form of online platform might fill the gap – but how? What sort of system/platform? How could it all work?

We lost the battle on quality in quantitative research because the practice was based almost entirely on the premise that consumers are rational beings who can tell you in a structured way what and why they have done something, and what they will do in the future. And we now know that this premise is untrue. We were then left with the concept of statistical rigour, which proved to be a complete chimera in the commercial world of consumer products, and so there remained very little real science to defend our brand offer.

Qualitative research has a sound scientific basis

Qualitative research, on the other hand, which was always treated historically as the 'poor relation' in the industry – and as somehow 'dubious' and certainly rather unreliable and unreplicable - has proved to have a real scientific basis as the new neuroscience has developed. Let's seize that finding, and make use of it, to develop a real USP.

Confronting the issue of quality in qualitative research

The Unilever thinking

As Unilever identified in 2010, when they introduced their own programme of qualitative accreditation, quality lies both with the client and the researcher. The client must be well trained in the proper use of qualitative research, and promote it within his/her organization. The researcher must have the capability of producing 'world class' quality of work.

The Gold Standard researcher is a researcher who has the ability not only to uncover the real 'why' of human behavior, but also to go beyond the findings and provide strategic advice in terms of implications for the brand or category.

The researcher needs to be not only a great moderator – which requires the real human understanding skills, of excellent empathy, listening, etc., but also he/she must be:

- Conscientious
- Strategic thinker
- Have empathy with the client context
- Be able to provide fresh ideas and thoughts and have the ability to link up brand/category issues with consumer understanding
- Challenging and proactive

And these qualities need to be *consistently* evident over and above the excellent qualitative moderation skills.

It is not necessarily about experience, but more about the maturity to understand the problem in the given context and the passion to provide the right solutions.

The origins of the idea – identifying the need for consistently better qualitative research practice, globally

These are qualities more akin to an artist than a scientist – not to be assessed just in terms of clinical tests or examinations, or by multi-choice tests or essays, but by observation and reviews of work completed.

Confronting the issue of quality in qualitative research

Observing poor/inconsistent work in developing markets

The first intimation that qualitative research really needed both to be 'transformed' in terms of real consistent global quality, and a 'makeover' in terms of brand, came when training in Africa and Asia, some five to seven years ago, i.e. at the point when those markets were developing fast, and predicted to develop faster. It was clear from discussions with clients, international agencies and local researchers that there was a problem. There were just too many stories of respondents 'miraculously' recruited the day before a focus group, of unbriefed moderators, of little recording or evidence of what actually happened, of entrepreneurs 'training' researchers to do a specific social project. There were exceptions of course – but they were definitely not the rule!

The introduction of the Unilever Qualitative Researcher Accreditation Programme

The second 'observation', which confirmed the initial intimation, was knowledge and experience of the Unilever Qualitative Researcher Accreditation programme, which confirmed much of the growing awareness that the MR industry needed to sharpen its act if it was to continue to meet the needs of commercial clients.

Observing that the non-profit sector didn't do (much) qual research

The third confirmation was starting to work more with the NGO sector. The ESOMAR Foundation and Paragon Partnership are both MR industry initiatives which have the joint mission to help the world of non-profit organisations use market research more effectively to guide their actions and decision making. It's obvious to us researchers that research *has* to be a key ingredient to drive understanding of how to help people, and we have some excellent case studies showing the effectiveness of great research. But somehow the more we tried, the harder it became: the non-profit sector focusses much more on quantitative research than qualitative, because 'Donors want hard numbers', and qual research really has a poor image in the sector, and is just not seen as relevant by donors. Out of this particular observation there started to develop a real passion to change donors' attitudes to qualitative research – because they are simply wrong!

The real experience of working with a Charity

Then came the real pivotal story: We started working with Street Invest, a charity that helps street children around the world. They initially asked for help with a quantification project – to count the number of street children in Kolkata, India. The UN has a big drive to 'Leave no-one behind', so quantifying the 'missing millions', including street children, who are not counted in censuses and official statistics is clearly important. However looking behind this first request, what we discovered was that Street Invest's real problem was that they had a lot of qualitative data, but didn't know how to use it. We brought them together with Big Sofa, a video technology business, committed to helping clients use video to analyse human behavior. Their platform was ideal for the purpose. They helped Street Invest conduct

ethnographic research, which was used as input to develop a video to help change donor and public perception of street children.

This film is now used as part of Street Invest's behavior change workshops, and is delivered to stakeholders, such as police. It has also been used to raise awareness of the issues street children face with donors.

However, Street Invest did not want the journey to end there. Like many small organisations, they do not have the funds or resources to conduct research on a large scale, regularly. Instead they wanted to explore how they could embed the learnings from the research into their day-to-day work.

They collect data regularly from organizations in their network who work with street children. They believed that if they could adopt ethnographic methods to do this, it would result in better data and richer insights. This could be fed back into their partner organizations and also could be used to inform their advocacy work. Finally, these insights might also shine a light on other data gaps and would give them a solid knowledge base to make the case for additional research.

Lots of people need good qualitative research skills!

They were already collecting regular data from their network partner organisations, including how many children they reach, their age and gender. They also asked for case studies, but knew they could be stronger. They wanted to move from receiving one off 'stories' about a child to a more structured approach. They wanted to be able to follow the development and experiences of one child, for a whole year. One of their learnings from the Big Sofa project was that street-based youth workers make excellent ethnographic researchers. They are already immersed in the child's day to day lives. The children trust them. Crucially, they interact in the child's place, for example on the streets, so the child never has to step into an environment that is not their own. They asked the youth workers to consider their interactions with and observations of the child over the course of the month. Then, following a structured set of questions, write a reflective response.

So far they have been using this technique for about eight months, with three partner organisations. It is very much a work in progress! The youth workers have commented that employing this reflective practice has helped them in their work. And Street Invest are, slowly, starting to develop a better picture of what a street child's life looks like over a longer period of time.

This experience taught them (and us!) several things. Firstly that *qualitative research presented well can make a difference to donors*, and secondly that *qualitative research skills have relevance far outside of market research*.

But the what could be the solution to all these issues?

So, we had all these factors coming together: the need to improve the quality of qualitative research – probably through training, the example of the Unilever scheme, the concept that qual research could make a difference to donors, and the knowledge that qual research skills are important generally – in the commercial and non-profit world. But still the solution was elusive...

That light-bulb moment

Then came the real moment of inspiration. At the 2017 ESOMAR Congress in Amsterdam, whilst talking to a very experienced qualitative researcher who had been involved with the Unilever Qualitative Accreditation scheme as an assessor, she commented on how frustrating it was to watch a researcher conduct a group discussion, make basic errors, and knowing that with a bit of coaching she could have helped the moderator improve, but having to just go home and write an assessment report – to fail the moderator!

This was the thought: *in order to coach a qualitative moderator, all that was required was for an experienced qualitative researcher to watch a video of a group discussion conducted by the moderator and give formal feedback and coaching*. Within the next 10 minutes, I mentioned this to Simon Lidington of Big Sofa, and he said we could use his platform.

Like all good ideas – in the end it is obvious – all the ingredients were already there – they just had to be linked together

So now we had the platform – we needed content – videos of groups conducted by people who wanted to be coached, and experienced qual researchers to do the coaching. Then we could see if it all worked and develop a system and process. The devil is in always the detail.

The fellowship forms

What follows is the story of a collaboration of the ESOMAR Foundation, Paragon Partnership, BBC Media Action, Big Sofa, and experienced qualitative researchers from all over the world, coming together to solve an important industry issue - the quality of qualitative research, globally.

A significant dose of serendipity has played a large part in this project. Whenever it is discussed, people are always very keen to help – but voluntary efforts only go so far – they always have to take second place to the volunteer's actual job. So it always helps if the job is enhanced in some concrete way, by the volunteering.

The platform

Big Sofa is a video technology business, committed to helping clients use video to analyse human behavior – their platform is ideal for our purpose, *and they are committed to the development of qualitative research globally, whatever it takes*. In this case the whole business is on board.

The committed client

The next element of serendipity was to find someone who was keen to help, and who was also tasked with the *personal business objective* of improving the quality of their organisation's qualitative researchers. And when a volunteering opportunity meets a personal business objective, it's always productive, we find!

As ESOMAR Foundation we had already been working with BBC Media Action on the value of Qualitative research. Sonia Whitehead is Head of Research at BBC Media Action, which is the international development charity of the BBC. It harnesses media and communication to engage and inform people - to empower people to change their behaviour, transform their lives and that of their communities. It uses mass media and communication, often supplemented with outreach activities to do this both at scale and with targeted, hard-to-reach communities. The organisation works across Africa, Asia, the Middle East and Europe, mainly in fragile states to achieve governance, health and resilience outcomes.

Research is embedded in their whole project cycle/process. A team of around 75 researchers in London and in 15 country offices conducts research to inform and monitor programmes, and to evaluate the impact of BBC Media Action interventions. The London team supports the local teams to deliver research as well as report on research globally.

In the next year, the team have clear *objectives and goals around building the capacity of the local country teams*, so that they can work more independently. In conjunction with the country directors, researchers will set aims and objectives for capacity strengthening.

BBC Media Action has an outstanding reputation for the impact, creativity, rigour, and measurement of its work, underpinned by a research team that has been described by a recent Department for International Development (DFID) assessment as “world class”.

The qualitative researcher

Last, but not least, Graham Woodham, an experienced qualitative researcher who had been working with Street Invest on their systems and has always had a keen interest in training and mentoring qualitative researchers, and had experience of the Unilever Accreditation programmed, was keen to help with coaching and defining a new approach.

The scene was set. The players were assembled. The play began.

The quest begins

The pre-pilot in Zambia

Since we really had no idea whether it would work in reality, we decided to do a pre-pilot.

The objectives of the pre-pilot were

- To test the technology in a developing market
- To understand how the coaching process might work for qualitative moderation
- (Subsequently) To test how the coaching might work for analysis and insight generation
- To obtain both coaches and moderators feedback on the detail of how the platform and proposed approach/method could work

Several of the BBC Media Action country teams were considered, but not everyone is keen to be monitored and coached by strangers – it can be a frightening prospect! The BBC Media Action team in Zambia was up for it, and so the first groups were conducted in Zambia – on an internal project – looking for feedback from listeners to a programme called *The Story of Gondo*: a radio drama about politics, corruption and gender based violence

The focus group objectives were defined:

- Explore participants' listening habits, including any radio dramas that they listen to
- Understand participants' views on BBC Media Action's radio drama series 'The Story of Gondo'
- Explore whether listening to 'The Story of Gondo' has had any impact on the target audience, in terms of their knowledge, attitudes, motivation or behaviour in relation to governance issues.

Nick, with three years experience, and Ireen, with 18 months experience, both BBC Media Action employees, were to be the moderators.

Two videos were taken of each group – one focused entirely on the moderator for the coaching on their moderation skills, and one focused on the respondents – to be able to note body language and non-verbal clues.

Literally the only technical problem encountered was with the uploading of the videos onto the platform – the files were too large for Zambian broadband capacities, and so had to be cut into smaller bits. This could be overcome, if encountered again in other countries, by simply couriering the tapes to the UK – though that would clearly slow the process.

Once uploaded, the videos were transcribed (the groups had been conducted in English), and the transcriptions were synchronised with the video.

Because we were concerned that an international coach might misinterpret local cultural signs we had two coaches, UK and Nigerian. This proved to be relatively important – as a simple example: in Zambia, moderators nod a lot when listening to respondents, but this does not signify that they are agreeing with the respondent, merely that they are listening.

Once the video and transcriptions were available on the platform, both coaches and moderators tagged the videos with codes for both good and poor moderation skills. Codes for good skills would include things like 'good introduction', 'good probing', 'good handling of difficult respondent', etc. Codes for poor moderation skills included 'looking down at script, not at respondent', 'poor probing', 'leading question', 'not picking up on interesting comment', etc.

Then a skype 'meeting' was held at which mentees and coaches discussed how they thought it had worked.

The mentee's view – how was it for them?

Nick and Ireen both 'enjoyed' the experience – despite all their verbal 'tics' and mistakes being revealed for all to see!

Nick particularly liked the tagging facility – he said that it enabled you to see where the coach thought you had made mistakes, and then you could see how many times you did it, and review each case. One of his 'issues' as a moderator was that he quite often looked down at his guide and lost eye contact with the respondent. We/he could look at every example and see the effect that it had on the respondent and the flow of the discussion.

Ireen too liked that different people could review the video and that you could review yourself. It was very helpful – though she hadn't realized how many times she used the term 'OK' – 274 times in one group! She also thought that the platform would be helpful with the analysis.

Nick made a point that we hadn't previously thought of – how useful it was to see another moderator's video – you could learn from that. So the cache of examples will be a useful training resource in its own right, and not just for BBC Media Action, as they are prepared to make their examples available to all who use the platform.

However, it should be noted that BBC Media Action would not normally video a group in Zambia – they would usually only make a sound recording - so just the fact of having a video to review was a benefit, not to mention all the technical advantages, e.g. tagging, that came with the platform.

The coaches' view

As mentioned earlier we had two coaches: Graham Woodham – an experienced UK based international qualitative researcher, and Anu Mohammed, Head of Research at BBC Media Action, Nigeria, and an experienced qualitative researcher:

Here is Graham's commentary on the coaching experience:

'As part of my long career as a qualitative research consultant, I have spent over 15 years coaching and mentoring young researchers. For this process, I am used to set-ups with a static camera showing the moderator with the focus group respondents also in view. I then discuss relevant video sequences face-to-face with the researcher to help them perfect their moderation skills.

I like to focus on the subtleties of the process by friendly discussion, so I was initially apprehensive about whether an online platform would make the feedback remote and impersonal. In fact, it was highly interactive and did not create barriers between the mentors and researchers.

Using the close-up video of the moderators on one camera, I could focus on all aspects of their skills, verified by the participants' reactions on a second camera video stream, as needed.

It was an easy process to note precise time sequences showing better and worse moderator skills for a friendly and empathetic real-time discussion with them, before tagging examples for shared access on the platform at a later stage. The tags relate to both the video and simultaneous transcript, so the functionality is excellent for illustrating the issues discussed previously.

These tags can precisely demonstrate the range of relevant moderator behaviours:- their probing, turn of phrase, engagement with the respondents and all aspects of non-verbal cues, facial expressions, body posture and eye contact.

I'm very aware of the huge cultural differences in moderator styles and social interaction processes between participants. But uploading the videos to this smart online platform genuinely supports cross-cultural mentoring involvement and allows moderators to learn from their counterparts from other nationalities which share the same first language.

We collectively found that the platform genuinely supported our aim to create a friendly, interactive mentoring process which was supportive, not harsh and judgemental.

And here's Anu's commentary – the experience from her point of view:

*'Research is an integral part of all our projects, qualitative and quantitative research is conducted to inform and evaluate our work. We have researchers in 16 countries (nine in Africa), and approximately 20 researchers in London working with the teams to support them. We have a research strategy set up for the next three years, and one of the key elements of this is to build the capacity of local researchers to ultimately reduce the support in London and ensure that high quality research is conducted in country. One area identified for support was **to improve the quality of qualitative research**. Across Africa we conduct focus groups and depth interviews (mostly in-house) to understand complex concepts and sensitive topics for example – Girls' Education in South Sudan, Reproductive Health in Zambia*

and Child Immunization and Health-Seeking-Behavior in Nigeria. We realized that one-off training to train people to do focus groups was not working, and trying to build skills from London over the phone was hard.

The aim for this collaboration was to see whether there could be a better way of skilling up researchers over time, but still remotely, so that people could learn by practice and through support from mentors. Zambia was chosen for the pilot. Two researchers from Zambia were identified as mentees for the pilot. Focus groups were conducted to understand people's views of a drama.

As a research lead, I am usually able to review and feedback on researchers' moderating skills by listening to audio recordings of focus groups or in-depth interviews or by being physically present in field - which could be very demanding, but the added value of this approach was great; it allowed me to be able to coach researchers remotely and help build their skills.

BBC Media Action hopes to use this opportunity to provide coaching to researchers across its country offices. We hope to roll this out across our country offices, and also to extend it to freelancers working for us, and organisations that we partner with. We also hope to input into a peer-to-peer process where mentors from other countries and people who have been through the process will support others, e.g. the researchers who have been mentored in Zambia could go forward mentor researchers in neighboring countries, e.g. Tanzania.

However there are still a few things to work out on this process:-

- *Do all countries have the capacity to use video for focus groups?*
- *Are respondents/moderators in some contexts too conscious of the video as something they are not used to? Will they be willing to be videoed?*
- *How does it work with other languages – does it become a lot more intensive?*

What next for the Zambia pre-pilot?

Anu identified some very key aspects that we need to test in the next pilot. But first we wanted to follow through on Ireen's idea, and see if could be more ambitious and use the platform to coach qualitative researchers in analysis and insight generation - not just in moderation skills. Clearly this is going to be much more time intensive for the coach – but was it even feasible?

Zambia focus groups – Stage 2 – Coaching on analysis skills

We are interested in whether the platform could also be used to coach researchers in analysis skills. So Nick and Ireen coded the respondent videos for analysis, and produced a client presentation. The coding, analysis and presentation were critiqued by the coaches.

Normally Nick and Ireen would use the typed-up transcripts for the analysis – read, take notes, produce analysis grids, etc. – the traditional way that qualitative research has been analysed for decades.

They found that coding the video was initially slower than their traditional methods, though they thought that speed would improve with experience. They thought that being able to use video clips so easily was beneficial, since clients could 'see' the level of agreement. It adds robustness, and is more engaging. (Remember, however, they did not video before – so this was a new possibility for them in Zambia – and you can imagine how the BBC Programming Team would welcome being able to actually watch the videoed comments of the respondents on the characters, the actors, the plot, etc!).

The coaching on analysis skills was somewhat limited in this case, and certainly more time consuming for the coach, but all agreed that it was a feasible method that could be developed.

Overall coach's conclusions from Zambia pre-pilot – Graham Woodham

Following the final discussion with BBC Media Action colleagues in London and Zambia, following is Graham Woodham's summary of our conclusions about the platform's application to coaching qualitative researchers in moderation and analysis skills.

- *Coaching and mentoring of moderation skills*

Undoubtedly, the platform has proved invaluable for coaching qualitative moderators following our pilot focus groups, with simultaneous use of one video focused on the moderator throughout a focus group and with a second camera simultaneously recording the group participants. This second camera pans across to those who are actively contributing to the discussion but still includes the non-verbal communication (NVC) of all participants.

The moderator video reveals their inter-personal skills, interviewing techniques and any areas where they could improve. The platform shows that a simultaneous transcript of the discussion and subsequent tagging with relevant points of interest such as good indirect probing, engaging body language, leading questions, etc. can then be an excellent coaching tool to illustrate moderator skills to discuss and build upon.

- *Coaching and mentoring of focus group content analysis*

The BBC Media Action qualitative moderators typically analyse focus groups using transcripts typed by a person who did not attend the sessions but listened back to audio recordings. This is a record of the verbal content only, inevitably excluding any short passages where several participants are talking at once or when the sound is otherwise briefly inaudible.

Our conclusion was unanimous that using a video from a camera panning and focusing on the group respondents is far superior as an analysis tool. The video stream records verbal discussion and also shows the non-verbal communication and body language which accompanies what respondents say. This can clarify the conviction or certainty with which respondents are expressing their views and also shows other respondents' NVC: signaling levels of agreement, disagreement or scepticism regarding what is being said.

The moderators can then apply tags to relevant opinions on the transcript and also when NVC factors are relevant to the analysis, for example if a topic raised nuanced differences of opinion or a strongly felt consensus.

The best way of tagging for analysis purposes is for the moderator to pre-set tags needed for the final presentation of findings structure. The discussion guide is a good starting point for this. Then the moderator can add further analysis tags on viewing the video in order to register findings which were relevant and interesting, but arose spontaneously from the participants.

Naturally, this process is initially slower than simply making notes from typed transcripts, but the resultant quality is infinitely superior, and our Zambian moderators felt they would be able to accelerate the tagging process with practice.

This tagging of key findings can also replace conventional analysis grids or Excel spreadsheets because the number of similar tags indicates the importance and frequency of occurrence of relevant findings, thus showing their weighting and levels of certainty. This is an impressive step towards 'quantification' of qualitative outputs. At the very least, it minimises moderator error or unconscious bias when they are analysing using only their judgement on levels of consensus and which issues were of highest importance.

The process of setting the tags is a user-friendly process using the Big Sofa platform. For analysis, tags can be set for simple topics such as good or bad storylines or characters in the radio series researched in the Zambian pilot. Then more subtle, nuanced tags could identify convincing elements of the radio drama, rapport and empathy felt by the programme listeners, personal identification with plotlines such as gender issues or governance and emotions aroused such as sympathy, anger, personal reflection and empowerment.

There is ultimately a huge benefit when creating the presentation of findings because the PowerPoint presentation can be accompanied by a separate screen showing tag-defined video clip playlists to illustrate key issues. This becomes more persuasive and authoritative when clients see these clips and do not simply have to trust and believe the moderator's interpretation.

In practical terms, the file size of video clips is usually too large to incorporate into the PowerPoint chart deck itself, but a parallel screen presentation with the video clips shown directly from the Big Sofa platform provides a solution to this.

It is quick and easy to compile a video clip playlist for a relevant topic and the colour-coded tag headings are shown above each video clip as it plays. Longer or shorter video clips can be selected for this purpose with repeated brief clips showing consensus on a topic, or longer extracts illustrating more subtle or emotive discussion issues.

- *Conclusions from the Zambia pre-pilot*

The online platform is invaluable for coaching and mentoring on moderation skills, using both the fixed camera focused on the moderator and the other hand-operated camera panning across the participants. It can show better and worse interviewing techniques by the moderator for later discussion to highlight best practice and areas for improving their skills. This can be developed to lead to accredited qualifications for moderators which are industry approved.

For qualitative analysis, the second moveable, tripod-mounted camera showing participant responses which can be tagged into relevant discussion topics or observational NVC themes, can capture both what is said and how the respondent contributions are put across. So it is an excellent analysis tool which is a safety net so that subtle or elusive findings are not ignored or overlooked. The results are therefore more objective, thorough and believable for the client audience. Human error in moderator analysis is minimised and the findings are then illustrated and reinforced by video clip playlists for the final debrief itself.

For Coaching in Analysis skills the advantage is that the process is fully replicable. The coach can check the coding and then the interpretation and the final insights and presentation of results, and thus is able to guide the mentee to see gaps, biases and over-interpretation in their analysis.

Summary of conclusions from the Zambia pre-pilot

Overall, therefore, the pre-pilot confirmed that:

- Coaching and mentoring of moderation skills is possible
- Coaching and mentoring of analysis skills is possible

Further questions to be addressed were identified: 1. Multiple languages, 2. Are all countries capable of the video formats required, 3. Are there potential issues with respondents being videoed in some countries

And, of course, there is still the whole issue of client confidentiality to confront. BBC Media Action are very open with their work, and willing to share with everyone who wishes to learn. But live focus groups on commercially confidential subjects have to be included at some stage, if the recommended approach is to work.

The quest continues

Presenting at the AMRA Conference and Stage 2 Pilot

We considered that the pre-pilot exercise in Zambia had been successful re the methodology, and it was presented at the 2018 AMRA Conference, in Nairobi, but, as concluded above, there were still more things to test.

The AMRA Conference generated a lot of interest – we requested volunteers – agencies and individuals who wanted to take part in the next stage main Pilot. BBC Media Action were planning to continue their contribution, this time in Sierra Leone and Lebanon, but we also wanted eight to ten young African volunteers who would each post videos of their group discussions onto the platform for comment by volunteer expert qualitative researchers, both international and local.

However, TIA (This is Africa) as they say there – not everything goes to plan. So, what happened next?

It seems that Zambia was not unusual, and most focus groups in Africa are not automatically videoed – so there were individual volunteers who wanted to be coached, but they had no videos to submit. Another lesson that we should not make assumptions.

Agencies definitely wished to be involved – but it depended on the projects, resource availability, and client willingness. Also the requirement for videos and transcripts into English was a barrier.

New members join the fellowship – Forcier Consulting and DCDM Research

We were fortunate that BBC Media Action was committed to their business objective of improving their qualitative work, and so they continued – but in South Sudan, not Sierra Leone or Lebanon, we are still awaiting the go-ahead for the Lebanon project.

In addition, we have two agencies: Research Solutions in Nairobi, and DCDM Research in Mauritius, who wish to participate, but are delayed. Research Solutions will try to involve some volunteers from the University of Nairobi. DCDM plan to undertake a syndicated project.

At the current time (beginning August 2018) we have just finished loading the videos from South Sudan. Again there were considerable problems with the broadband speeds, the videos had to be cut into pieces and put back together again. The project is about Girls' Education. BBC Media Action were already working with Forcier Consulting on a quantitative project, and have introduced focus groups to add understanding to the quantitative data. Moderators from BBC Media Action and Forcier are being mentored.

The objectives of this second pilot are to:

- Work in different languages, including local variations
- Work in countries where videoing is difficult
- Involve more agencies/individuals as coaches and mentees

What has been done so far – in South Sudan:

- Filmed two groups in Aweil – BBC Media Action researcher moderating - (using phones to film)
- Filmed two groups in Juba – two Forcier Consulting researchers moderating - (using tablets to film)
- Filmed two groups in Rumbek – BBC Media Action Researcher moderating - (using phone to film)

What went (unexpectedly!) well for the research team was obtaining consent from the participants to be filmed. This was not an issue and the Head Teacher who signed on behalf of the students was very cooperative and thanked us for the 'attention' and 'care' we are showing to the school and students

But we also encountered unforeseen challenges:

- Logistically, transporting cameras is an issue in South Sudan. Authorities are suspicious when they see a camera in the luggage. There are very strict rules about taking pictures and filming. Anyone 'caught' filming without authorizing risks prosecution. Luckily, we didn't need special permission to film in Juba but authorization from the authorities would be needed if we were to travel with cameras.
- When using phones to film, we didn't have tripods. Researchers asked two people to hold the phones, but these people kept moving. So the image is not static and the audio not clear.
- There is also the issue of memory and recording on phones and having to do the recording in little bits

The resulting videos are, admittedly, a challenge – some groups are in the open air with all the consequent noise and disturbance. The quality of the filming is not very good. But the videos are there – on the platform. The next stage is transcription from local languages into English. Then the coaching can begin. The process has taken longer and been more difficult than we anticipated. But then we *are* talking about a difficult country for research generally – but an important one as far as NGOs are concerned.

Apart from South Sudan, the two other agencies in Nairobi and Mauritius have been briefed and have access to the platform – and plan to start in September.

What next? The Stage 3 pilot and refinement of the detail

Based on the pre-pilot we know that the approach is capable of *coaching researchers in both Group Moderation and Qualitative Analysis*. But already we believe that we can propose the overall method as the basis of a *new global Professional Qualification in Qualitative Research Practice*.

The issue is not with the technology or the overall concept – it is in the detail of the actual implementation

The next stage is to pilot in developed markets – we have a volunteer agency in the UK and will invite others in Europe and the US.

We will continue with both the South Sudan Pilot and Lebanon with BBC Media Action, and with DCDM research and Research Solutions in September. Probably both with internal projects to begin with, then we need to get a commercial client on board to address issues of client confidentiality.

The proposed system of mentoring and accreditation for qualitative researchers

The mentoring system – how it would work

We recommend that mentoring should be done on a voluntary basis – there are many excellent and experienced international qualitative researchers who are willing to help young researchers. Perhaps once the accreditation scheme is established it could become part of the terms of Accreditation - that each accredited researcher has a mentee on a regular basis? Or agreement to mentor others, post accreditation, could result in a discount in the fees for accreditation, which might help in poorer countries.

The mentoring could either be a long term relationship – say six months or six groups? Or ‘on demand’ - where the mentee could simply ask for a one-off feedback/coaching for any group they submit to the platform. This could work for ‘difficult’ groups experienced, which the mentee would like help with.

Note that ESOMAR needs to encourage the videoing of groups as standard practice, as far as is feasible. Nothing will improve the quality of the research more. And it would improve client confidence in the qualitative research process.

Should the coach/mentor be local or international? Clearly it is simply impractical to have both at the mentoring stage.

There would be benefits in the *dual* involvement of local mentors sharing the same first language and cultural nuances of the moderator and participants. But international mentors from countries where qualitative skills are long established and held in high esteem by global clients can add an extra dimension, both in terms of a second opinion on the mentee’s skills on display, and also through their broader perspective from careers in multi-country qualitative projects. Most experienced qualitative researchers frequently coordinate projects across four to six markets and that breadth of understanding of what to expect from moderator styles within each culture would add value to the mentoring process.

An ambitious young qualitative researcher would probably try to have both local and international coaching!

We propose that an online pool of experienced mentors is developed, and a system of matching established. Initially the matching would need to be closely managed – but over time the process would become more established and automated.

The process of accreditation

Questions to be addressed

With regard to the actual accreditation, there are many issues to be addressed. How do you measure great qualitative research? How do you test for a great qualitative moderator or researcher? These are not qualities to be addressed via multiple choice questions or essays or even viva. It has to be through observation of the process of research, or assessment of the actual results of several projects.

And who can judge? Is it clients or peers? How many opinions are required? Is it possible to be a gold standard researcher in one category, but not another?

Should there be different levels of accreditation? Perhaps what is good in an emerging market, where research is necessarily conducted in unsuitable premises or outdoors, and with a possibly ‘difficult’ audience, cannot be judged on exactly the same criteria as a group conducted with middle-class housewives in a comfortable suburban venue? (Perhaps the assessment should code the ‘difficulty’ of the group being assessed, on various criteria, and then the quality of the group is judged based on the level of ‘difficulty’ - so a ‘good’ moderation with an extremely difficult group on a difficult category - counts the same as an ‘excellent’ discussion with an easy group on a very easy category?)

Suppose we really widened the scope of the qualification, and encouraged Street Invest’s Youth Workers to be mentored and qualified - they interview children on the street, and conduct group discussions anywhere they can, for example on the platforms in railway stations in India – how would they be assessed? The qualification is just as relevant for them to do excellent work, and make a difference, as for any commercial researcher.

In fact, the qualification would be relevant to many people working in NGOs, consultancies and business, who need to understand the needs of others/customers, so that they can deliver effective workable solutions/products. It has the potential to become a widespread global qualification.

What would be covered in the assessment?

Ideally an applicant should be assessed on *different qualitative approaches*, a selection would include focus groups, individual depth interviews with b2b respondents, ethnographic observation with follow up interviewing. I.e. not just on focus groups, or a single category.

Examples of what would also need to be assessed as part of the accreditation could be:

Types of brief:- Creative exploration of new ideas, Consumer understanding and fine tuning of pre-designed communication concepts or new product ideas, Exploration of consumer motivations and behaviours, Deep understanding of participant attitudes/emotions regarding social or political issues.

Moderation skills:- Adaptation of the moderator to build rapport with different participant lifestages, e.g. children in two to three year age bands, young adolescents/teenagers, students in education, young adults in their first job, pre-family young adult males and females, young parents and so on through to empty nesters and elderly people. Moderators have to adapt very specifically to the people they are interviewing as well as to the topic.

Plus the *basic 'rules' of good qualitative interviewing*, including non-leading questions, open probing which is not long-winded, avoidance of unwittingly giving respondents sample answers to 'choose from', good non-verbal communication and body language to build empathy with the people they are interviewing.

Levels of qualification

Our initial proposal is for two levels of accreditation based on up to five years' and then five or more years of qual experience. The former could be on moderating only (*Accredited Qualitative Moderator*) and the second level would be on moderation and project design and management (*Accredited Qualitative Insight Consultant*). Accreditation testing should be based on at least three distinctly different types of projects, e.g. concept evaluation focus groups, attitudinal or motivational exploratory focus groups and observation and interviewing for ethnography, if relevant to the market concerned. (This could include three from a longer agreed list of topic areas).

The assessors – how should they be identified/how would the assessment work?

Accreditation would be assessed by acknowledged qualitative experts. It would be necessary to agree the process by which people would become assessors. Probably the criteria would include length of experience plus a number of recommendations from clients

Each individual applicant would be assessed by two assessors, with the option of calling on a third should the two disagree. The assessors and applicant should be unknown to each other. This would prevent any accusation of bias or favouritism. Assessors should be paid a fee for each assessment.

Ideally, a local experienced qualitative researcher should undertake the primary assessment which then goes to an international qualitative expert in multi-cultural studies for final approval. If clients want to get involved, (and it would be good if they did), an optional extra refinement would be to include client insight specialists among those who could give final approval of the Accreditation award.

The accrediting body

The accrediting body should be ESOMAR/MRS/AMRA/Other appropriate industry bodies plus client representatives, as well as representatives of NGOs, if we wish to broaden the programme.

The criteria for assessment

The final assessment would be based on a minimum of three videoed group discussions/IDIs – preferably on different types of project (for moderators), and three group discussions plus three reports (for insight consultants). Or two full projects from brief to presentation with client testimonial?

Fees/costs

For developed markets there would be a fee to pay for the assessment, to cover the costs for developing markets and not-for-profit organisations the fee would be nominal. Alternatively if fees are not desired, then payment or donations to a designated charity of the assessor's choice would be an ideal.

Overall conclusion

There are still many details to be ironed out, but we believe that the approach we have piloted for mentoring is viable and sustainable, and the recommended approach to accreditation is also viable and sustainable.

We believe this approach could be the real breakthrough in the ongoing development of qualitative researchers globally, and in introducing professional standards to the MR industry (and all who need to practice good qualitative research skill in their professional lives). After all if 'The Future of Market and Social Research is Qualitative' and we believe that the MR industry should position itself more firmly in the consumer (human) understanding market, then we have to have professional qualifications!

Only by these two actions can we differentiate ourselves in the market.

Also if, as the market research industry, we don't get our act together and start to *always* deliver real quality data and actionable insights - then we fear that both other sectors and/or online qualitative methods will take over, and we will have missed a huge opportunity - simply through inactivity. Let's grasp this chance to make a difference!

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