Maintaining the Integrity of Data Collection, Analysis, & Reporting with a Committed Reflection on

BIAS

11 Articles on Maintaining the Integrity of Qualitative Research by Reflecting on Researcher & Participant Effects

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The contents of this compilation include a selection of 11 articles appearing in *Research Design Review* that highlights the importance of reflecting on researcher and participant effects to mitigate potential bias in qualitative research methodology. These articles represent a small sampling of the articles in *RDR* devoted to research integrity and a quality approach to qualitative research design and methods. Excerpts and links may be used, provided that the proper citation is given.

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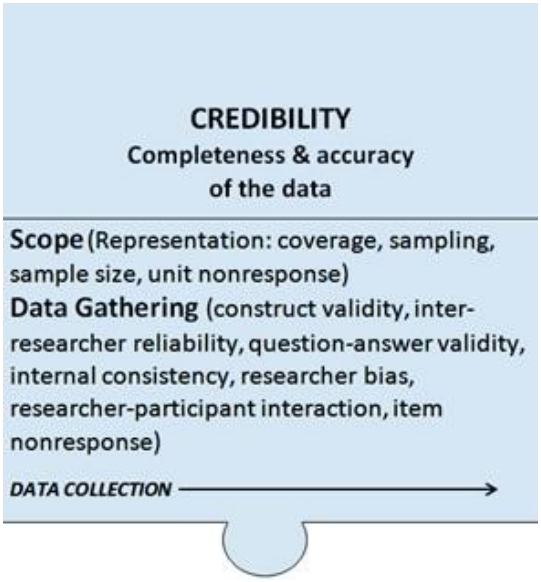
The Focus Group Method: Mitigating Moderator Bias



The moderator plays a central role in the focus group method. As the **data collection "instrument,"** the moderator carries the weight of designing a **funnel-shaped discussion guide** that effectively addresses the research objectives by way of a broad-to-narrow, contextual approach. The moderator is then responsible for using their expertise to adapt the guide for each group of participants with the goal of reaching the research objectives with quality data.

There are any number of ways that the moderator influences the integrity of the data. The following is a modified excerpt from **Applied Qualitative Research Design: A Total Quality Framework Approach** (Roller & Lavrakas, 2015, pp. 144-146) discussing one such influence — moderator bias — and suggested approaches to mitigating this effect.

The focus group moderator can negatively impact the quality of data that are gathered and therefore the credibility of the research outcomes via a variety of ways that may bias the data. The moderator, for instance, may have an impact on the participants' responses by **behaving in a certain manner** (e.g., affirming a response or favoring one participant over another), **verbal behavior** (e.g., interjecting their own personal opinion regarding the topic of discussion), displaying particular **demographic or physical characteristics** that may be obvious depending on the mode (e.g., apparent racial differences in face-to-face groups), or, in face-to-face groups, **dressing in a certain manner** (e.g., wearing jeans and a tee-shirt to a discussion with business managers).

The potential impact of moderator bias can be reduced by proactively integrating quality-control measures in the design of a focus group study, such as:

•• A **pretest phase** is not typically conducted in the group discussion method due to reasons of practicality (e.g., the additional cost a pretest adds to the research budget and the additional time it adds to the research schedule). However, pretesting is always a best practice because it reveals ways in which the moderator may be overly influencing responses, and pretesting has proven effective in determining the "most appropriate" group interviewing technique (see Kenyon 2004).

•• The researcher moderating a group discussion must know when and how to follow up on participants' comments and to **probe responses that may be unclear or inconsistent** with remarks made earlier in the discussion.

•• The researchers should observe the first few focus group discussions each moderator conducts in real time (e.g., by way of a one-way mirror or virtual backroom; Note: Group participants are informed of the presence of observers prior to the discussion), listen or view the audio or video recordings, and/or read the transcripts of these discussions very soon after they have been conducted. The goal is to **detect potential bias as early as possible** and provide instructive, unambiguous feedback to the moderator to help them eliminate any future bias. Even with experienced moderators, it is prudent that the researchers commit the time required for this quality assurance phase.

•• A **reflexive journal** is an important and necessary quality-control feature of focus group research design. Focus group moderators who keep a reflexive journal enhance the credibility of the research by way of maintaining a record of their experiences and how they may have biased the discussions. Moderators can create reflexive journals by listening to audio recordings (or watching video recordings) of focus groups they have just conducted and giving firsthand accounts of how they may have unduly influenced participants' comments and the ultimate outcome of the discussion.

Kenyon, A. J. (2004). Exploring phenomenological research: Pre-testing focus group techniques with young people. *International Journal of Market Research*, *46*(4), 427–442.

Roller, M. R., & Lavrakas, P. J. (2015). *Applied qualitative research design: A total quality framework approach*. New York: Guilford Press.

Ethnography & the Potential for Bias

The following is a modified excerpt from Applied Qualitative Research Design: A Total Quality Framework Approach (Roller & Lavrakas, 2015, pp. 184-185).

The major limitations of ethnographic research fall into three broad categories: (1) the potential for bias and weakened **credibility** of the data that are gathered, (2) logistical and practical issues in implementing an ethnographic study, and (3) the narrow target populations that can be studied well using this method of research. The following is a discussion of the potential for bias.

The possibility of bias creeps into ethnography by (a) the mere presence of the observer who may distort the very behaviors of the participants being studied; and (b) the observer's own preconceptions, attitudes, and expectations, which may bias the information the observer gathers and interprets. Even in the case of **covert observers**, their immersion into a group may be the catalyst that materially changes what subsequently happens in the group. Unless observers are carefully trained and well experienced on how to maintain objectivity in the field, and unless they use their analytical abilities to think and record solely from the perspective of the participants, they can harm the integrity of research outcomes.

Observer bias can actually pose a greater threat to ethnographic research than **interviewer bias** poses in the in-depth interview method or moderator bias in group discussions. This is because, unlike these other methods, the observer in an ethnographic study may take on the **role** of a complete participant who is fully engaged with the social group under study or may otherwise have some affinity for the situation being investigated. In either case, there exists the potential for bias by way of the observer "going native"—as illustrated by Schouten and McAlexander (1995) in their study for Harley–Davidson (see p. 175)—or imposing their own knowledge and experience, which may (a) impede the observer's ability to sense what is going on in the study environment from the participants' points of view or (b) change the group dynamics in material ways from what would have happened had the observer not become a member of the group.

The type of bias associated with having "some affinity for the situation" is particularly notable in ethnographic research when the researcher has used "opportunistic" or **convenience sampling**, which is the practice of selecting a study environment and/or research participants that are easily (and inexpensively) available and familiar to the

observer. For example, a researcher studying how people behave and interact in confined spaces might decide to take advantage of their daily ride on the local subway to observe other commuters, or a study to observe the staff–patient dynamic in a geriatric facility might be conveniently conducted at the facility where the researcher regularly visits their parents. Bernard (2011) used his vacation in Mexico to track the use of "beach space" by American and Mexican families.

Bernard, H. R. (2011). *Research methods in anthropology: Qualitative and quantitative approaches* (5th ed.). Lanham, MD: AltaMira Press.

Schouten, J. W., & McAlexander, J. H. (1995). Subcultures of consumption: An ethnography of the new bikers. *Journal of Consumer Research*, *22*, 43–61.

In-depth Interviewer Effects: Mitigating Interviewer Bias

The following is a modified excerpt from Applied Qualitative Research Design: A Total Quality Framework Approach (Roller & Lavrakas, 2015, pp. 83-84).

The outcome of a qualitative in-depth interview (IDI) study, regardless of mode, is greatly affected by the interviewer's conscious or unconscious influence within the context of the IDIs—that is, the absence or presence of interviewer bias. The interviewer's demographic characteristics (e.g., age, race), physical appearance in face-to-face IDIs (e.g., manner of dress), voice in face-to-face and telephone IDIs (e.g., a regional accent), and personal values or presumptions are all potential triggers that may elicit false or inaccurate responses from interviewees. For example, imagine that an IDI study is being conducted with a group of public school teachers who are known to harbor negative feelings toward the district's superintendent but who express ambivalent attitudes in the interviews as the result of the interviewers' inappropriate interjection of their own personal positive opinions. In this way, the interviewers have caused the findings to be biased. In order to minimize this potential source of distortion in the data, the researcher can incorporate a number of quality enhancement measures into the IDI study design and interview protocol:

- The IDI researcher should conduct **a pretest phase** during which each interviewer practices the interview and learns to anticipate what Sands and Krumer-Nevo (2006) call "master narratives" (i.e., the interviewer's own predispositions) as well as "shocks" that may emerge from interviewees' responses. Such an awareness of one's own predispositions as an interviewer and possible responses from interviewees that might otherwise "jolt" the interviewer will more likely facilitate an uninterrupted interview that can smoothly diverge into other appropriate lines of questioning when the time presents itself. In this manner, the interviewer can build and maintain strong rapport with the interviewee as well as anticipate areas within the interview that might bias the outcome.

For example, Sands and Krumer-Nevo (2006) relate the story of a particular interview in a study among youth who, prior to the study, had been involved in drug use and other criminal behavior. Yami, the interviewer, approached one of the interviews with certain

assumptions concerning the interviewee's educational background and, specifically, the idea that a low-level education most likely contributed to the youth's illicit activities. Because of these stereotypical expectations, Yami entered the interview with the goal of linking the interviewee's "past school failures" to his current behavior and was not prepared for a line of questioning that was not aimed at making this connection. As a result of her predisposition, Yami failed to acknowledge and question the interviewee when he talked about being a "shy, lonely boy" and, consequently, stifled the life story that the interviewee was trying to tell her.

- The interviewer should use **follow-up and probing questions** to encourage the interviewee to elaborate on a response (e.g., "Can you tell me more about the last time the other students harassed you at school?"), but not in a manner that could be perceived as seeking any particular "approved" substantive response.

- Using **a reflexive journal** is an important and necessary feature of an IDI study design. This device enhances the credibility of the research by ensuring that each interviewer keeps a record of his/her experiences in the field and how he or she may have biased interview outcomes. The interviewer reflects carefully after each completed IDI and records how he or she may have distorted the information gathered in the interview (inadvertent as it may have been) and how the interviewee's behavior and other factors may have contributed to this bias. This "reflexive objectivity" (Brinkmann & Kvale, 2015) helps the interviewer gain "sensitivity about one's [own] prejudices, one's subjectivity" (p. 278) and consider the impact of these influences on the credibility of the data. This objectivity might also reflect on any personal characteristics of the interviewer (e.g., voice parameters, personality traits, demographics) that affected the interview and resulted in unintended variation across all IDIs. By way of the reflexive journal, the research is enriched with a documented firsthand account of any interviewer bias or presumptions as well as variations in the interviewer's handling of interviews throughout the study.

- A reflexive journal can also be used in **the triangulation of interview data**. From a **Total Quality Framework** perspective, a best practice is to have an impartial research team member review the audio or video recordings from one or more IDIs to identify how and under what circumstance the interviewer may have biased interviewees' responses. In turn, this review can be used in cross-reference with the interviewer's reflexive journal and discussed with the interviewer to help them better understand lapses in self-awareness. This journal also becomes an important component of the study's audit trail and a tool in the final data analysis and interpretation.

Brinkmann, S., & Kvale, S. (2015). *Interviews: Learning the craft of qualitative research interviewing* (3rd ed.). Thousand Oaks, CA: Sage.

Sands, R. G., & Krumer-Nevo, M. (2006). Interview shocks and shockwaves. *Qualitative Inquiry*, *12*(5), 950–971. https://doi.org/10.1177/1077800406288623

Image captured from: http://www.jeannievodden.com/light-effects-11-x-15-c2009/

Ethnography: Mitigating Observer Bias

The following is a modified excerpt from Applied Qualitative Research Design: A Total Quality Framework Approach (Roller & Lavrakas, 2015, pp. 207-212).

In qualitative research, the researcher – including the in-depth interviewer, focus group moderator, coder in content analysis, and observer – *is* the instrument, meaning that the qualitative researcher wields substantial control in the design content, the gathering of data, the outcomes, and interpretation of the research. Ethnography is no different in that the observer – albeit not controlling participants' natural environment – plays a central role in creating the data for the study by way of recording observations. In this respect, the credibility of an ethnographic study essentially rests on the observer's ability to identify and record the relevant observations.

The necessary observer skills have been discussed elsewhere in *Research Design Review* – for example, **"The Importance of Analytical Sensibilities to Observation in Ethnography."** Without these skills, an observer has the potential for biasing the data which in turn will negatively impact the analysis, interpretation, transferability, and ultimate usefulness of an ethnographic study. The potential for bias exists regardless of **observer role**. An offsite, non-participant observer may knowingly or not impose subjective values on an observed event – e.g., ignoring certain comments the observer finds personally offensive in a study of an online forum discussing alcohol use – while an onsite observer, operating either overtly or covertly, may bias results by way of personal characteristics (such as age or racial identity) and/or inappropriate behavior (such as personal commentary during the observed event).

The effects of possible observer bias should be anticipated in the design of ethnographic research and can be mitigated by the integration of many quality features, including those having to do with the implementation of the **observation guide and observation grid**. Here are five quality features to mitigate observer bias specific to *who the observer is and how the observer thinks*:

- Matching onsite observers with study participants. Onsite observers should be "matched" to the study participants to the extent warranted by the study environment and objectives.

- Observers must be trained to play the dual role of "insider" and "outsider." Observers must learn to play a dual role as both "insider" – observing events from the participants' perspective – and "outsider" – observing events with an objective, value-free frame of mind. This is a critical skill and, if the observer was to learn only one thing in training, this is the skill to focus on. A dual perspective bolsters the credibility of the data by fostering honest accounts of the observed events by way of internalizing participants' meaning while at the same time minimizing the possibility of observer bias by casting an objective, non-judgmental eye.

- Continually monitor observers' objectivity. Objectivity is paramount in all research but particularly in ethnography when the researcher/observer may spend extraordinary amount of time in the field and, depending on the observer role, operate among the participants. For this reason, an ethnographic study needs to be continually monitored and controlled for the possibility of observers' inappropriate value judgments and other groundless interjections in the data.

- Adequate training in "acting" skills. Onsite participant observation requires a certain amount of "acting" from the observers. The ability to step outside oneself to take on and maintain a different persona while "in character" as a participant in ethnographic observations is an important skill. The abilities to "blend in" and "not make waves" help minimize observers' effects on the behaviors and events they are observing. In this way, observers are less likely to bias (i.e., change in a distorting way) what they are trying to objectively observe.

An observer's acting skills are particularly important in **covert participant observations** where the observer is concealing his or her identity to the participants. Covert participation also requires an observer who is comfortable with the idea of deception. For many people, covert observation may cause tension which may manifest itself in ways that will cause the observer to behave awkwardly (including a compulsion to confess the observer's true identity), distorting the behaviors and other aspects of the observed event. To minimize observer bias in these situations, the researcher must select observers who are completely accepting of the covert role while engaging with participants so as to not negatively affect the credibility of the data they gather for their study.

- Observers must engage in constant self-evaluation. It is the responsibility of the observer to engage in constant and detailed *self-evaluation*, such as maintaining a **reflexive journal**, about how the observer may have changed the outcomes being observed. This becomes a critical tool in formulating (and tempering) one's conclusions about the study and thereby enhancing the credibility of the study through disclosure of this self-critique process.

Image captured from: http://blog.aarp.org/2014/01/27/are-you-in-the-hospital-or-not/

Paying Attention to Bias in Qualitative Research: A Message to Marketing Researchers (& Clients)

Researchers of all ilk care about bias and how it may creep into their research designs resulting in measurement error. This is true among quantitative researchers as well as among qualitative researchers who routinely demonstrate their sensitivity to potential bias in their data by way of building interviewer training, careful recruitment screening, and appropriate modes into their research designs. These types of measures acknowledge qualitative researchers' concerns about quality data; and yet, there are many other ways to mitigate bias in qualitative research that are often overlooked.

Marketing researchers (and marketing clients) could benefit from thinking more deeply about bias and measurement error. In the interest of "faster, cheaper, better" research solutions, marketing researchers may lose sight of quality design issues, not the least of which concern bias and measurement error in the data. If marketing researchers care enough about mitigating bias to train interviewers/moderators, develop screening questions that effectively target the appropriate participant, and carefully select the suitable mode for the population segment, then it is sensible to adopt broader design standards that more fully embrace the collecting of quality data.

An example of a tool that serves to raise the design standard is the reflexive journal. The reflexive journal has been the subject (in whole or in part) of many articles in *Research Design Review*, most notably **"Interviewer Bias & Reflexivity in Qualitative Research"** and **"Reflections from the Field: Questions to Stimulate Reflexivity Among Qualitative Researchers"**. A reflexive journal is simply a diary of sorts that is utilized by the qualitative interviewer or moderator to think about (reflect on) how his/her assumptions or beliefs may be affecting the outcomes (i.e., the data). It enables the researcher to re-assess (if necessary) his/her behavior, attitude, question wording, or other aspects of data collection for the purpose of mitigating distortions in the data.

The reflexive journal may be a foreign concept among qualitative marketing researchers (and marketing clients). Why is this? Is there a belief that interviewer/moderator training sufficiently guards against potential bias? Is there a belief that all qualitative research is biased to some degree – because, after all, it isn't survey research – so any

attempt at mitigation is futile (which, of course, begs the question, 'Why bother with qualitative research at all?')? Is there a head-in-the-sand (i.e., not-wanting-to-know) mentality that refuses to think of the interviewer/moderator as someone with assumptions, beliefs, values, and judgments but rather as a "super human" who is able to conduct a semi-structured in-depth interview (IDI) or focus group discussion devoid of these human qualities (i.e., lacking humanness)?

The humanness in all of us is worthy of reflection. And in qualitative research design this reflection can be put to good use mitigating bias in our data. As the interviewer considers how certain behavior may have elicited responses that were not true to the participant, or the moderator reflects on how his/her favoritism and attention towards a few focus group participants over others shifted the course of conversation and the outcomes of the discussion, these researchers are using their introspection to improve the research by moving data collection (and data outcomes) to a higher standard. This is how interviewers learn to adjust the interview guide or consciously alter their behavior during an IDI to gain more accurate data, or the moderator comes to understand his/her own prejudices and finds corrective techniques to become a more inclusive moderator and ensure an even-handed approach to the discussion.

Two important and **unique attributes to qualitative research methods** are the "researcher as instrument" component, i.e., the researcher is the data collection tool, and the participant-researcher relationship. These attributes speak to the humanness that both enriches and complicates the social-exchange environment of the IDI and focus group discussion. And it is this humanness – embedded in qualitative research – that should obligate marketing researchers to consider its import in achieving quality outcomes. If marketers care enough about the integrity of their data to adopt high standards in training, recruiting, and mode, why not care enough to mitigate bias in data collection by utilizing tools – such as a reflexive journal – to seriously examine the human factors that potentially increase inaccuracies and error in the final data?

Image captured from: https://gone-fishin.org/2012/01/31/burying-ones-head-in-the-sand/

Seeing Without Knowing: Potential Bias in Mobile Research

Mobile research – specifically, research by way of smartphone technology – has become a widely used and accepted design option for conducting qualitative and survey research. The advantages of the mobile mode are many, not the least of which are: the high incidence of smartphone ownership in the U.S. (91% in 2025), the ubiquitous influence smartphones have on our lives, the dependence people have on their smartphones as their go-to channel for communicating and socializing, and the features of the smartphone that offer a variety of response formats (e.g., text, video, image) and location-specific (e.g., geo-targeting, geo-fencing) capabilities.

From a research design perspective, there are also several limitations to the mobile mode, including: the small screen of the smartphone (making the design of standard scale and matrix questionnaire items – as well as the user experience overall – problematic), the relatively short attention span of the respondent or participant precipitated by frequent interruptions, the potential for errors due to the touch screen technology, and connectivity issues.

Another important yet often overlooked concern with mobile research is the potential for bias associated with the smartphone response format and location features mentioned earlier. Researchers have been quick to embrace the ability to capture video and photographs as well as location information yet they have not universally exercised caution when integrating these features into their research designs. For example, a recent webinar in which a qualitative researcher presented the virtues of mobile qualitative research – esp., for documenting in-the-moment experiences – espoused the advantages of utilizing systems that allow the researcher to identify a participant's location. Among these advantages, according to the presenter, is the ability to gain the exact location of someone's home address during an in-home use test (IHUT) which then, with the help of Google Earth, enables the researcher to actually see the property and surrounding neighborhood. The presenter went on to state that *these location images can and should be used with the intent of evaluating some aspect of this person's life such as their socio-economic status*.

The blatant bias this introduces into the research should be obvious. Where someone chooses to live *may* say something about their household income, educational achievement, and even their "social circles"; however, it is certainly not true in all cases and, indeed, such appearances can be grossly deceiving. And, even if the researcher could ascertain some idea of the individual's demographic or social group, what would be the point or use of this information? Only to deepen the bias by creating a story of someone's lived experience based on unsubstantiated claims built on preconceived stereotypical assumptions?

A similar bias creeps into mobile qualitative research when participants are asked to submit their responses in the form of videos and/or photographs *without also being asked for accompanying commentary or follow-up questions by the researcher*. By simply submitting these images without explanation, the researcher comes to his/her own conclusions which then lead to bias and error in the data which ultimately downgrades the value of the final outcomes. If the researcher conducting an IHUT study on eating habits, for example, learns from the participant that she and her family eat a "healthy" diet but sees from a submitted photograph a refrigerator containing fruits and vegetables but also donuts, Coke, and processed cheese – what is the researcher to make of that? Are the participant's eating habits really not that "healthy"? Are there additional healthier foods hidden from view in the refrigerator's compartments or drawers? Does the participant's definition of "healthy eating" include donuts, Coke, and processed cheese? Without examining the whys and wherefores *with the participant*, the researcher is left to form a subjective understanding of the fridge contents and may create a false yet seemingly plausible story about the participant from the image.

Mobile research gives the researcher new and convenient ways to learn about the lives of the people who matter most in our research designs. And yet, researchers are cautioned to tread carefully or risk infecting their data with an insidious and potentially destructive bias that comes from conjecturing stories of people's lives by relying on what researchers *see* rather than from what they *know* to be true.

Image captured from: http://brucemctague.com/unthinking

Qualitative Research: Using Empathy to Reveal "More Real" & Less Biased Data

The fourth edition of Michael Quinn Patton's book *Qualitative Research & Evaluation Methods* is a big book — over 800 pages — with updated and new content from earlier editions, including something he calls "ruminations" which are highlighted sections in each chapter that present Patton's commentary and reflections on issues that have "persistently engaged, sometimes annoyed" him throughout his long career in qualitative research. Patton has made some of these ruminations available online via his posts on the betterevaluation.org blog.

In his November 14, 2014 post, Patton shares his "Rumination #2: Confusing empathy with bias." In it, he raises an important issue — having to do with the personal nature of qualitative research and how that impacts data collection — that, on some level, runs through the qualitative-quantitative debates waged by researchers who argue for one form of research over another. Such a debate might involve a survey researcher who, entrenched in statistical analysis, wonders, 'What is the legitimate value of qualitative methods given its focus on the convoluted intricacies of feelings and behavior which are often conveyed by way of others' nebulous stories?' All of this convoluted interconnectedness is enough to stymie some quantitative researchers, and yet it is the stuff — it is the *juice* — that fuels the qualitative approach.

Is "getting close" to research participants by truly empathizing with their life situations — or sincerely trying to understand what they are saying in response to questions by "walking in their shoes" — interjecting bias that damages the final outcomes leading to false interpretations of the data? And if that is the case, what is the justification for qualitative research in the first place? After all, if its "juice" is the personal connections researchers make by way of empathizing with participants yet it is this empathy that makes the results suspect; well, it is no wonder that there are some who perpetuate the qualitative-quantitative debates.

All research with human beings is about the human experience. All research is designed to tap into what it means to have a certain experience — regardless if that experience is a fleeting thought, a sensation, a sharp attitude, an impulse, or deliberate behavior.

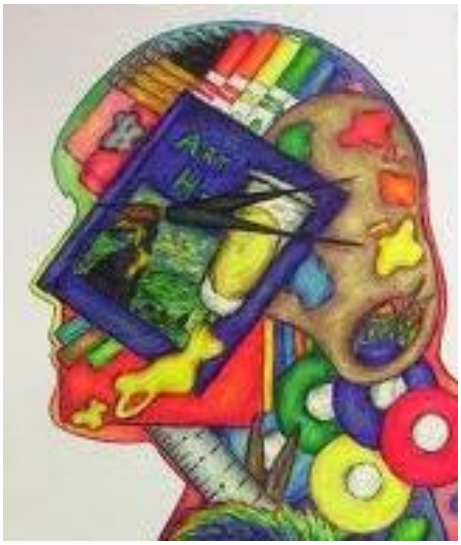
Qualitative research celebrates the humanness of these experiences. By rooting out the personal connections that are the essence of these experiences, qualitative research methods animate the thought, the sensation, or the impulse behavior in order to expose the experience for what it truly is. In this way, the experience has been laid bare for all to see.

It is precisely because of their empathy — the ability to observe and listen from the participant's standpoint — that qualitative researchers routinely uncover **how people think**, revealing the interconnectivity that brings meaning to the experiences that lie at the center of their research. This level of meaning — this laying bare of the connections — gives the researcher an unfiltered view of the human experience which, some could argue, seems "truer" and "more real" — that is, less *biased* — than survey data based on forced responses to closed-ended questions.

So, empathy is good. Empathy enables the researcher to come to terms with how *other* people think by thinking like them; which may, at the same time, provide clarity and actually *reduce* a form of bias in the data. Indeed, empathy may be the essential ingredient lacking in survey research to release the pent-up bias inherent in data that stems from the failure to look for (and make) the connections that define the human experience.

Image captured from http://berkozturk.deviantart.com/art/empathy-211500476

Interviewer Bias & Reflexivity in Qualitative Research



A challenge to any research design is the pesky issue of bias or the potential distortion of research outcomes due to unintended influences from the researcher as well as research participants. This is a particularly critical issue in qualitative research where interviewers (and moderators) make extraordinary efforts to establish strong relationships with their interviewees (and group participants) in order to delve deeply into the subject matter. The importance of considering the implications from undo prejudices in qualitative research was discussed in the April 2011 *Research Design Review* post, "**Visual Cues & Bias in Qualitative Research**," which emphasizes that "there is clearly much more effort that needs to be made on this issue." Reflexivity and, specifically, the reflexive journal is one such effort that addresses the distortions or preconceptions researchers unwittingly introduce in their qualitative designs.

Reflexivity is an important concept because it is directed at the greatest underlying threat to the validity of our qualitative research outcomes – that is, the social interaction component of the interviewer-interviewee relationship, or, what Steinar Kvale called, "the asymmetrical power relations of the research interviewer and the interviewed subject" (see **"Dialogue as Oppression and Interview Research," 2002**). The act of reflection enables the interviewer to thoughtfully consider this asymmetrical relationship and speculate on the ways the interviewer-interviewee interaction may have been exacerbated by presumptions arising from obvious sources, such as certain demographics (e.g., age, gender, and race), or more subtle cues such as socio-economic status, cultural background, or political orientation. Linda Finlay (2002) identifies five ways to go about reflexivity – introspection, inter-subjective reflection, mutual collaboration, social critique, and discursive deconstruction – and discusses utilizing these techniques in order to understand the interviewer's role in the interview context and how to use this knowledge to "enhance the trustworthiness, transparency, and accountability of their research" (p. 211-212). An awareness of misperceptions through reflexivity enables the interviewer to design specific questions for the interviewee that help inform and clarify the interviewer's understanding of the outcomes.

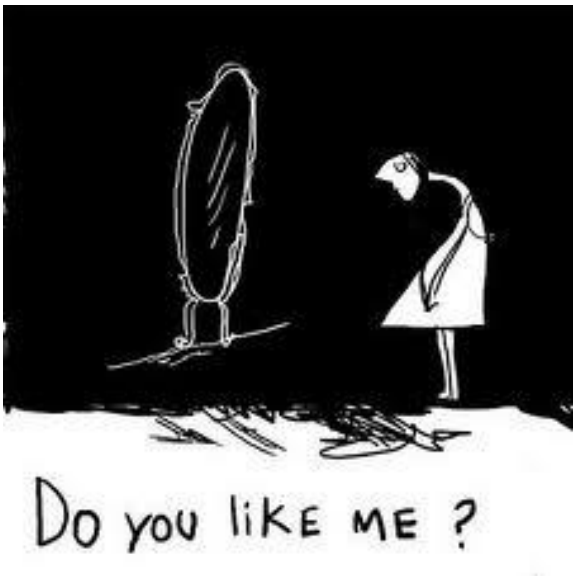
It is for this reason that a reflexive journal, where the interviewer logs the details of how

they may have influenced the results of each interview, should be part of a qualitative research design. This journal or diary sensitizes the interviewer to their prejudices and subjectivities, while more fully informing the researcher on the impact of these influences on the credibility of the research outcomes. The reflexive journal not only serves as a key contributor to the final analyses but also enriches the overall study design by providing a documented first-hand account of interviewer bias and the preconceptions that may have negatively influenced the findings. In this manner, the reader of the final research report can assess any concerns about objectivity and interpretations of outcomes.

Reflexivity, along with the **reflexive journal**, is just one way that our qualitative research designs can address the bias that most assuredly permeates the socially-dependent nature of qualitative research. Introspective reflexivity – along with **peer debriefing** and **triangulation** – add considerably to the credibility and usefulness of our qualitative research.

Finlay, L. (2002). Negotiating the swamp: The opportunity and challenge of reflexivity in research practice. *Qualitative Research*, *2*(2), 209–230.

Accounting for Social Desirability Bias in Online Research



An article posted back in 2011 in *Research Design Review* — **"13 Factors Impacting the Quality of Qualitative Research"** — delineated three broad areas and 13 specific components of qualitative research design that can influence the quality of research outcomes. One factor, under the broad category of "The Environment," is the "presence of observers/interviewers as well as other participants." In other words, how does the inclusion of other people — whether it be client observers, interviewers, fellow participants, videographers, or note takers — affect the attitudes, behaviors, and responses we gain from our research efforts? Does research, almost by definition, create an artificial social context where participants/respondents seek others' approval leading to a false understanding of their realities?

Social desirability bias is not a new concern in research design and its influence on the ultimate usefulness of our qualitative and quantitative research has been the focus of attention for quite some time. Tourangeau, Rips, and Rasinski (2000) discuss social desirability in the context of sensitive questions:

"[The] notion of sensitive questions presupposes that respondents believe there are norms defining desirable attitudes and behaviors, and that they are concerned enough about these norms to distort their answers to avoid presenting themselves in an unfavorable light."

Nancarrow and Brace — in their article "Saying the 'right thing': Coping with social desirability in marketing research" (2000) — address the under- and over-reporting associated with social desirability bias and outline numerous techniques that have been used to deal with the problem — e.g., emphasizing the need for honesty, promises of confidentiality, and question manipulation by softening the suggestion that the respondent *should* know the answer to a particular question or behave in certain way.

Online technology and the ever-growing online research designs that are emerging — within social media, mobile, bulletin boards, communities, and survey research — have allayed social-desirability concerns. The belief among some researchers is that one of the

beauties of the virtual world is that inhabitants basically live in solitude, stating that a key advantage to online qualitative research, for instance, is the obliteration of social desirability bias and hence the heightened validity of online vs. offline designs*.

The idea that researchers who design online studies can ignore potential bias due to social desirability seems misguided. In fact, a good case can be made that the Internet and online technology have unleashed a dynamic capacity for posturing and the need for approval. Popularity and even celebrity — so elusive to the everyday person in earlier times — have become preoccupations. You only need to witness the apparent race for Facebook friends and 'X', Instagram, and TikTok followers — as well as the "vanity" and online self-publishing craze — to gain some insight into the potential competitiveness — i.e., pursuit of social stature — fueled by the realm of online. In this way, the virtual social environment has encouraged a look-at-me way of thinking and behaving.

So, how real are those at-the-moment snippets transmitted by mobile research participants (which may be meant to impress the researcher more than inform)? How honest are those product reviews or blog comments? What is the extent of bravado being exhibited in our online communities, bulletin boards, and social network exchanges? The answer is we do not know, and yet it doesn't take a great leap of faith to acknowledge that the individual attitudes and behavior we capture online are potentially distorted by an underlying need for social approval.

To paraphrase Mark Twain, the reports of the death of social desirability bias in online research are greatly exaggerated; and, to the contrary, social needs have blossomed in the online world. More than ever, people are asking, "Do you like me?" and, in doing so, presenting the researcher with a critical design issue that impacts the quality of our outcomes.

* https://www.greenbook.org/marketing-research/social-media-opportunities-for-market-research-37076

Nancarrow, C., & Brace, I. (2000). Saying the "right thing": Coping with social desirability bias in marketing research. *Bristol Business School Teaching and Research Review*, *3*(11).

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Selection Bias & Mobile Qualitative Research

When I conduct a face-to-face qualitative study — whether it is a group discussion, in-depth interview, or in-situ ethnography — I am taking in much more than the behavior and attitudes of the research participants. Like most researchers, my scope goes way beyond the most vocal response to my questions or the behavior of store shoppers, but incorporates much more detail including the nuanced comments, the facial and body gestures, as well as the surrounding environment that may be impacting their thoughts or movements. So, while one of my face-to-face participants may tell me that he "just prefers" shopping at a competitor's store for his hardware, I know from the entirety of clues throughout the interview that there is more to uncover which ultimately lands me on the real reason he avoids my client's store — the unavailability of store credit. Likewise, the mobile research participant shopping at Walmart for coffeemakers may share her shopping experience via video and/or text but unintentionally omit certain components — e.g., the impact of competitive displays, product packaging, store lighting, surrounding shoppers — that would have been discovered in an in-person ethnography and contribute important insights.

Selection bias is inherent in nearly all research designs. At some level research participants are deciding what is important to communicate to the researcher and what is worthy of being ignored. From deciding whether to participate in a study, to the granularity of details they are willing to share, the participant – not the researcher – controls some measure of the research input. It is no wonder that many of the discussions concerning research design center on this issue, with survey researchers discussing at length the best method for sampling and selecting respondents (e.g., the next-birthday method in telephone studies), converting initial refusals, and effective probing techniques.

There is not much discussion on selection bias in qualitative research. One exception is an article by David Collier and James Mahoney (1996) that addresses how selection bias undermines the validity of qualitative research. More focus on the issue of selection bias in qualitative research is warranted, particularly given the speed with which research designs today are evolving to keep up with new communication technology.

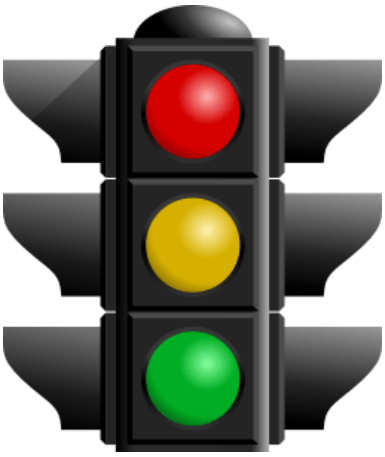
Mobile research is just one example of a popular qualitative research method. Mobile research provides a viable way to reach consumers in their own environment and to gain

a real-time view of their world. At long last we have direct access to something that in the past has been elusive – reality, the connection between what people think, what they say, and what they actually do. Mobile qualitative research is fueled by the notion that capturing people "in the moment" and allowing participants to drive what is or is not shared with the researcher results in a more real (i.e., accurate) accounting of some microcosm of a person's life. So, is it any wonder that mobile qualitative research has been hailed as "more accurate" (Kristin Schwitzer and Dana Slaughter, "Using Mobile Qualitatively to Transform Insight Generation")?

And that brings me back to selection bias. While the participant-driven model of mobile qualitative research may provide one perspective of human nature at a given point in time, we have to wonder how much of the whole story we are really getting. As long as participants control the portal by which we judge their attitudes and behavior, we run the real risk of introducing selection error into our research designs. Sound qualitative research, like any other research method, is built on a framework of design principles that ensure the integrity of our findings. I look forward to future discussions of error-prone weaknesses in mobile and other qualitative research designs.

Collier, David and James Mahoney, "Insights and Pitfalls: Selection Bias in Qualitative Research," *World Politics* 49 (October 1996), 56-91.

Visual Cues & Bias in Qualitative Research



The Darshan Mehta (iResearch) and Lynda Maddox article "Focus Groups: Traditional vs. Online" in the March 2011 issue of *Survey Magazine* reminded me of the "visual biases" moderators, clients, and participants bring to the face-to-face research discussion. While there are downsides to opting for Internet-based qualitative research, the ability to actually control for potential error stemming from visual cues — ranging from demographic characteristics (e.g., age, race, ethnicity, gender) to "clothing and facial expressions" — is a clear advantage to the online (non-Webcam) environment. Anyone who has conducted, viewed, or participated in a face-to-face focus group can tell you that judgments are easily made without a word being spoken.

An understanding or at least an appreciation for this inherent bias in our in-person qualitative designs is important to the quality of the interviewing and subsequent analysis as well as the research environment itself. How does the interviewer change his/her type and format of questioning from one interviewee to another based on nothing more than the differences or contrasts the interviewer perceives between the two of them? How do the visual aspects of one or more group participants elicit more or less participation among the other members of the group? How do group discussants and interviewees respond and comment differently depending on their vision of the moderator, other participants, and the research environment?

The potential negative effect from the unwitting bias moderators/interviewers absorb in the research experience has been addressed to some degree. Mel Prince (along with others) has discussed the idea of "moderator teams" as well as the "serial moderating technique." And Sean Jordan states that "moderator bias" simply needs to be "controlled for by careful behavior."

There is clearly much more effort that needs to be made on this issue. Creating teams of interviewers may mitigate but may also exasperate the bias effect (e.g., How do we sort out the confounding impact of multiple prejudices from the team?), and instilling "careful behavior" can actually result in an unproductive research session (e.g., Does the controlled, unemotional, sterile behavior of the moderator/interviewer elicit unemotional, sterile, unreal responses from research participants?).

How we conduct and interpret our qualitative research — whether we (consciously or

unconsciously) choose to impose barriers to our questioning and analysis in order to proceed with caution through the intersection of not knowing and insight, or go full steam ahead — rests in great measure with our ability to confront the potential prejudice in the researcher, the client, and our research participants.