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**Article**

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Major Change in the Quality Management of the Qualitative Market Research

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Abstract
The goal of the present article is to explore a major change in the quality management of a distinct category of services, respectively the qualitative research. The essence of the change consists in the creation of an international standard aiming to increase the quality and professionalism of the market, opinion and social research, also including the qualitative research. The approach is entirely focused on the services provided by companies specialized in this field to all the organizations that are interested in getting a better understanding of the market environment and of the marketing processes.

The article suggests a structured overview of the main standardization efforts in the market research field and benchmarks the use of the qualitative research in Romania, to other new EU member states and to the world practice. At the same time, it underlines the quality challenges raised by the qualitative research and identifies the specific guidelines for the quality management in the case of qualitative research services provided by specialized companies. The provisions of the standard ISO 20252:2006 relative to the qualitative research are presented. The continuous and professional implementation of the standard provisions will support the efforts of both suppliers and customers to obtain the highest value from qualitative market research services.

Keywords: quality management, qualitative research, focus groups, in-depth interviews

JEL classification: M10, M31

Introduction
An overview of the main regulation and standardization efforts in the field of market research has to identify the subsequent stages that have led to the present norms as well as the initiators of the changes and the promoters of the quality management principles among the specialized providers of outsourced research services. The initiatives came both from the research sector itself and from entities external to this sector, such as the International Organization for Standardization.

The initial stage has been triggered by the initiatives of ESOMAR (European Society for Opinion and Market Research) and several national research organizations aiming to guide the way market research is conducted. In 1948, ESOMAR has published the first code of market and social research practice. This approach was followed by national research bodies and by the International Chamber of Commerce (ICC) that have also issued codes...
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for the regulation of the research field. The second stage has consisted in the convergence of major codes. More precisely, in 1976, ICC and ESOMAR have agreed that the existence of a single code would be beneficial. In 1977, the first edition of the ICC/ESOMAR code was published. The third stage includes two correlated evolution directions. The former is the revision and update of the code relative to market and social research, in 1986, 1994 and 2008. The latter direction consists in the self-regulation (by means of codes of practice) of the implementation of specific research methods and studies such as: opinion polls, mystery shopping, research using the Internet, customer satisfaction studies, interviewing children and young people etc. Similarly the codes focused on specific aspects have been issued and then updated. For example, the former ESOMAR Guideline on Tape and Video Recording and Client Observation of Interviews and Group Discussions, previously updated in 1997, has been revised and published in February 2009, under the title of Passive Data Collection, Observation and Recording.

In the fourth stage, the research sector makes the first strides towards standardization. Three major directions evolve. Firstly, in the early 90s, many countries have developed their own quality standards for market research. The process has begun in UK and continued in Europe, Japan, Australia, Mexico, etc. Secondly, in 1999, EFAMRO (European Federation of Associations of Market Research Organizations) has launched the first multi-country initiative: the standard EMRQS. Thirdly, in the meanwhile, clients have expressed a growing need for the compliance of the research suppliers with widely accepted standards such as ISO 9001. However, the ISO 9001 is not specific for the market and social research, fact that enhanced the need for standards specially dedicated to this sector.

In the next stage, a global standard has been created. In 2006, after only 2.5 years of debate, the ISO Technical Committee TC 225 has issued the first global standard for quality assurance in market, opinion and social research – the standard ISO 20252. Thirty countries (full-participants or observers), EFAMRO, ESOMAR and WAPOR have contributed to the elaboration of this standard. (Philip, 2005) Romania has been among the observing countries to this process. In 2009, the TC 225 has issued a more specialized standard, the ISO 26362 relative to the access panels. The future will bring more professional regulations under the form of self-regulation codes and guidelines, as well as global standards. This trend will lead to a continuous quality improvement.

1. Conceptual clarifications

Quality management is applicable in the case of market research that is a distinct type of services provided by specialized organizations. In essence, according to the standard ISO 9000:2006, the quality management consists in coordinated activities in order to direct and control an organization with regard to quality (Paraschivescu, 2008). These activities include quality planning, control, assurance and continuous improvement. In the field of market research, in general, and of qualitative research, specifically, quality management refers to all the stages of the research process, aiming at improving the quality of the information output.

According to one of the most accepted defining perspectives (ICC/ESOMAR, 2008), market research includes social and opinion research and consist in the systematic gathering and interpretation of information about individuals or organizations using the statistical and analytical methods and techniques of the applied social sciences to gain
insight or support decision making. In addition, the ICC/ESOMAR revised code states relative to the market research that the identity of respondents will not be revealed to the user of the information without explicit consent and no sales approach will be made to them as a direct result of their having provided information.

Market research practitioners and theorists make a difference between the various types of research designs depending on the objectives of the research and on how much is already known by the research customer about the problem and market phenomenon that is studied. (Burns and Bush, 2005) Thus, the companies specialized in research may provide three major types of design: exploratory, descriptive and causal or a combination of these, according to the specific needs of the potential organizational customers. (Malhotra and Birks, 2007) The specialists have defined the three designs starting from the three main objectives that may be accomplished by research: to develop hypotheses, to measure the state of a variable of interest and respectively to test hypotheses that specify the relationships between two or more variables.

Addressing the decision problem, professionals use qualitative and/or quantitative research. The qualitative research is not competing against the quantitative research. In fact, the qualitative research complements the quantitative research.

In essence, the qualitative research allows a better understanding of the marketing phenomenon that is investigated, without applying to quantifications or quantitative analysis. (Balan, 2002) The qualitative research is an unstructured, exploratory research methodology based on small samples. Main qualitative research methods are the focus groups, in-depth interviews.

Qualitative research makes possible the investigation of various issues such as the reasons of consumer choices, the use of specific products and services, areas of satisfaction/dissatisfaction relative to the use of a product or service, the positioning of a brand in the minds of users, the criteria used by consumers in the selection of goods and services, the perceptions of potential consumers/users relative to a new product or advertising concept etc.

Practitioners use the qualitative research in order to accomplish both “exploratory” and “explanatory” types of research objectives. (Mariampolski, 2001) For example, the exploratory objectives may encompass: discovery when very little is known about products/services/market segments; study of the consumer behavior (purchase, usage, decision making criteria etc.); hypotheses generation relative to the preferences and attitudes of buyers and users; brand positioning among the consumers from a target segment; idea generation (for new products, advertising copy etc.); scenario generation relative to consumer demand. The range of explanatory objectives achieved by means of qualitative research includes: motivational analysis; consumer differentiation and segmentation; interpretation of the data generated by quantitative research; additional probing in the case of confusing and inconclusive data.

2. The qualitative research services in Romania

In Romania, the use of qualitative research has expanded progressively beginning with the 90s. This type of research was commissioned either separately or in combination with quantitative research. An ever greater number of research companies may provide qualitative research services at international standards. Among the reasons that have led to
the increase in the organizational demand for qualitative research range the following: the possibility to identify the motivations and in-depth feelings of consumers; the gathering of data about aspects that are sensitive to the respondents, due mostly to the impact on their image and social status; the enhancement of research effectiveness, by defining the variables and hypotheses that will be investigated within the framework of a further quantitative research; the lower cost compared to the quantitative research.

The trends registered in Romania are similar to those from other new EU member states. The total value of the turnover generated by the qualitative research services has increased annually.

In 2007, at global scale, the market research turnover reached the value of USD 28.235 billion. (ESOMAR, 2008) In Europe, the value was USD 12.882 billion. The qualitative methods accounted for 14% of the global research spend in 2007. The group discussions have contributed with 72% to the qualitative research spend and the in-depth interviews with only 14%, the rest of 14% being due to other qualitative research methods. The distribution of qualitative research spend by method reflects primarily the need of the organizational customers for specific types of information. The figures may also suggest a propensity of the companies specialized in market research to apply mostly the group discussion method. There is a potential risk to switch from “methodology” to “methodolatry”, being excessively focused on methods and paying less attention to the substance of the reality that is studied. (Stokes and Bergin, 2006) Experts consider that many advantages claimed for focus groups relate to aspects such as costs, time and easiness of the analysis - aspects that are extrinsic issues of the process and do not relate to the quality of the research outcome. In fact, while the focus groups are better suited to wide-ranging exploratory research, the in-depth interviews are a better choice when it is necessary to get a detailed understanding of consumer perspectives.

In 2007, in Romania, the market research turnover has reached a value of USD 45 million, respectively 3.75 times higher than in 2003. A share of 16% of this turnover has been generated by the application of qualitative research methods. A comparative analysis with other new EU member states is presented in the next table (table 1):

The share held by the qualitative research in the total research turnover in Romania is close to the level registered in 2007 at global scale. In addition, the share is similar to those specific to other new EU members (Slovak Republic, Slovenia and Poland). In terms of methods, group discussions had the largest share of qualitative research spend, as in the other countries.

Qualitative research services have reached a significant value on the Romanian market, respectively Euros 5.28 million (USD 7.2 million) in 2007. In order to consolidate and develop this multi-million Euro business, the companies specialized in research activities should continuously manage the quality of the qualitative research provided to various organizational customers.

The share of the qualitative research in the total research turnover is more than five times smaller than the share of quantitative research. This ratio is a reality in both the Romanian and world market due to the specific role and use of the qualitative methods compared to the quantitative ones. Nevertheless, the research providers must maintain the interest of their present customers and attract new ones. In this respect, the implementation of the
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Market research turnover, share of qualitative research turnover in the total research turnover and distribution of the qualitative research turnover by method, in the new EU member states, in 2007

<table>
<thead>
<tr>
<th>Country</th>
<th>Research turnover</th>
<th>% of qualitative research in the total research turnover</th>
<th>Structure of the qualitative research turnover by method (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>USD mil.</td>
<td>Euro mil.</td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>209</td>
<td>152</td>
<td>16</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>110</td>
<td>81</td>
<td>15</td>
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<tr>
<td>Hungary</td>
<td>85</td>
<td>62</td>
<td>12</td>
</tr>
<tr>
<td>Romania</td>
<td>45</td>
<td>33</td>
<td>16</td>
</tr>
<tr>
<td>Slovak Republic</td>
<td>26</td>
<td>19</td>
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<td>Slovenia</td>
<td>21</td>
<td>15</td>
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<tr>
<td>Estonia</td>
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<td>12</td>
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<tr>
<td>Bulgaria</td>
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<td>Latvia</td>
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<tr>
<td>Lithuania</td>
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<td>10</td>
<td>n.a.</td>
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<tr>
<td>Cyprus</td>
<td>6</td>
<td>4</td>
<td>7</td>
</tr>
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Note: n.a. Data not available.

3. Major challenges for quality management in the field of qualitative research

Due to its specific features, the qualitative research raises several challenges to quality management. Four major challenges are presented hereinafter.

Firstly, the complexity of the quality management is enhanced by the unstructured character of data collection. In essence, the qualitative research methods rely on open-ended questions that are answered by respondents with their own words. The structured methods based on closed questions - such as the survey - are less useful than the unstructured methods, in order to obtain information relative to sensitive or private issues or to behavioral aspects that may have a negative impact upon the ego or status of the respondents. In addition, only the open-ended questions may reveal values and motivations existing at the subconscious level. The free answers generated by the unstructured methods require a continuous monitoring of the quality of the data collection activities.

Secondly, the quality of the information obtained by means of qualitative methods depends heavily on the human factor that is in charge of the data collection, respectively the moderator in the case of focus groups and the interviewer for the in-depth interviews. Compared to the structured research, the moderator/interviewer is allowed to probe for additional information and clarifications. Probing is a technique used on one side to
motivate respondents to enlarge on, clarify, or explain their answers and on the other side to help respondents focus on the specific topic studied and provide only relevant information. Thus, quality management also encompasses probing that may be a potential source of research bias.

Thirdly, another challenge may be related to the small sample sizes. A fundamental characteristic of the qualitative research is the use of a small number of non-representative cases. Consequently, the quality of the information generated by the research may be drastically diminished in the case of an improper selection of the respondents.

Fourthly, the analysis and interpretation of the qualitative data may entail challenges to the quality management. Due to the small number of participants, data analysis is non-statistical. The frequencies and percentages are usually not presented in the final report of the qualitative research. Under such circumstances, the data analysis and interpretation are more complex and difficult than in the case of quantitative research. Quality management cannot afford to neglect the stages of data analysis and interpretation within the qualitative research process.

4. Turning point in the qualitative research: the first ISO standard dedicated to the market, opinion and social research

At present, the organizations specialized in providing research services on commercial bases must comply with the service requirements specified by the standard ISO 20252:2006. The development and publication of this international standard is a cornerstone for the research sector. Market, opinion and social research is the field on which focuses the standard. The standard provisions should also be applied by the companies that provide research services in Romania.

The standard ISO 20252:2006 includes numerous requirements that apply on one side to the development and maintenance of the quality management system and on the other side to the management of quality during each stage of the research process, for the quantitative and respectively for the qualitative research. The standard requirements relative to the qualitative research refer to aspects such as discussion guides, moderation and interviewing, respondent recruitment, recording of research, respondent confidentiality and research report. Some of them are analyzed hereinafter.

For example, the list of points or subjects to be covered in a focus group or depth interview should be defined by the research designer together with the customer representative. The research companies that do not provide customers the opportunity to participate in the design and/or the review of the discussion guide are breaching the requirements of the standard. The research provider may not apply the discussion guide until the customer approves it in writing. However, the client may fully rely on the research company and renounce to exercise the review and approval rights.

The moderators/interviewers and their activities make also the object of the quality management in focus groups and depth interviews. The quality of the research data is directly influenced by both the skills of the moderator/interviewer to communicate with participants and the knowledge about the specific research methodology to be applied. Thus, the international standard specifies the obligation of the research service provider to train and brief the moderators/interviewers irrespective of the company to which they belong (research provider or subcontracting company). Examples of briefing
information/instructions that clarify the aspects of the research methodology are the following: the fieldwork dates and time; key recruitment criteria; required quotas; the number of respondents to be recruited for each group discussion or in-depth interview; acceptable or unacceptable methods of recruitment; specific exclusions and restrictions applicable to respondents who have already attended group discussions or in-depth interviews; whether observation equipment is to be used.

At the same time, the moderators/interviewers have the obligation to familiarize themselves with the research methodology. Prior to the commencement of the work, the moderator/interviewer should acquire appropriate knowledge about the objectives of the research, the issues to be explored, the stimulus material and the particular techniques to be used. The current practice consisting in the involvement of the moderator/interviewer in the research design not only in conducting a focus group or an interview contributes to a high quality of the process and of the information output.

The moderator/interviewer should provide feedback to the research company relative to the problems identified during the implementation phase. Examples of aspects to be approached in the written report are the following: compatibility of respondents with the desired profile; suitability of the room(s) used and their facilities; the performance of the host/individual who received the group.

Respondent recruitment is of major importance to the qualitative research. It is carried out as a separate stage of the qualitative research process, by fieldworkers that are different from the staff responsible for the moderation stage. The customer that formulated a research request is entitled to know the respondent recruitment procedures. Each proposal for a qualitative research project should specify: the recruitment method (based on a pre-recruited panel or selected by other means); the time that must have elapsed since the last time the participants took part, if ever, in a group discussion or individual depth-interview; the number of individuals to be interviewed and/or the number of groups and intended number of participants in each group.

The data about the respondents that have been obtained based on recruitment questionnaires are put at the disposal of moderators. However, the project records may not be disclosed without the direct consent of the participants to focus groups/interviews, being subject to respondent confidentiality. The international standard specifies the need for the application of recruitment validation methods in the case of each person recruited for a qualitative research. The main aim of the validation is to confirm that demographic and other recruitment criteria are met. The methods recommended are: respondent re-contact between recruitment and the date of the group discussion or in-depth interview; respondent’s identity confirmation at the interview/group discussion. The re-contact of the respondent may be done by means of face-to-face communication, phone, post or e-mail.

Recording of research and respondent confidentiality are also addressed by the quality management in qualitative research. In accordance with the standard, full records shall be kept of group discussions and in-depth interviews, normally by audio or video recording. Research companies must review their practices in order to comply with the standard requirements according to which respondents must be made aware and give their consent relative to the recording itself, the intended use of the recordings and the transfer of data. Any data transfer is allowed on condition that respondents give their consent and only for research purposes. Thus, a transfer for commercial purposes is not allowed. The appropriate
management of the research quality implies not only the participant awareness of the audio or video recording, but also of the observation by third parties (including the client), especially in the case of the observation from a hidden viewing area. The recordings should be labeled by the research organization, in order to identify the project, the respondents and the date of the group or in-depth interview.

The qualitative research report shall document the following details: the name of the client; the name of the research service provider; the objectives of the research project; the target group of the research project; the number of persons interviewed or number of groups and participants within the groups; the date of the fieldwork; the fieldwork method; the recruitment method; the type of incentives; the numbers of moderators/interviewers; the moderator/interviewer validation method; the documents, materials or products; the discussion and/or interview guide.

In practice, many users of qualitative research overlook its exploratory character. They do not make a clear distinction from the descriptive and quantitative research. From this perspective, there is a real need for a reminder and clarification from the researcher’s side. This need is addressed by the standard by underlining that reports shall include a statement noting that the results of the qualitative research cannot be projected onto the overall population, due to sample selection, interviewing methods and sample size.

Conclusions

In Romania, the investments of the organizational clients in qualitative research services have progressively increased in the present decade. At the same time, the qualitative research studies raise various types of challenges in terms of quality management. On one side, the essence of the exploratory research implies strict boundaries relative to the manner in which data are analyzed and interpreted, as well as to the projection of the results onto the overall population. On the other side, there are numerous operational aspects that need to be carefully managed in order to ensure a high quality of the results for the client that has commissioned the research.

At world level, along the last decades, the community of research practitioners has initiated various approaches for self-regulation and standardization, in order to ensure quality management. The main tools designed by the research experts have been the codes of practice and the national/regional quality standards. In 2006, for the first time, an international standard has been issued in order to guide the quality management in the field of market research services. From the perspective of the qualitative research, the standard is a welcomed approach as long as research providers and their clients are prone to errors if they do not pay attention to the minute details of quality management. No relevant and useful information may result from a research process improperly managed.

In order to ensure the quality of the qualitative research, the specialized providers have to apply the provisions of professional standards, specifically of the international standard ISO 20252:2006. In addition, the organizational clients should analyze and monitor the quality of the research services provided to them on contractual bases by the companies specialized in the research field.

For the Romanian market, a systematic approach to evaluate the degree of implementation of the standard provisions by each research service provider would be necessary. Third
party entities – not research providers – may be required for the periodic monitoring of the quality management in the case of companies that provide qualitative research services.

Even if the objectives of the qualitative research are “exploratory” and “explanatory”, the better understanding of the market phenomena, the quality of the research process and implicitly of the research results are of utmost important to the organizational clients. The extent of standard implementation will also become a differentiation mechanism for the research companies and will provide a benchmark to the clients. When almost all the operators will apply on current bases the standard, its provisions will be to a less extent a differentiator but to a higher extent a warranty of quality for the clients.

References