

User Research Fundamentals

University of Greenwich // Nov, 2022

Steph Troeth

Hi! I'm Steph :-)



Head of Research @

dxw.

What will we cover?

- What is user research? Why do we need it?
- Setting research objectives
- Methodology, research methods & sampling
- How to write/ask good research questions
- Practice: interviewing & analysing data
- Becoming a better researcher



By the end of today, you will:

- Understand the fundamentals of user research
- Have practised some of the key skills
- Be ready for exploring design solutions



The quality of experience
is beyond your web site.

...or your web app

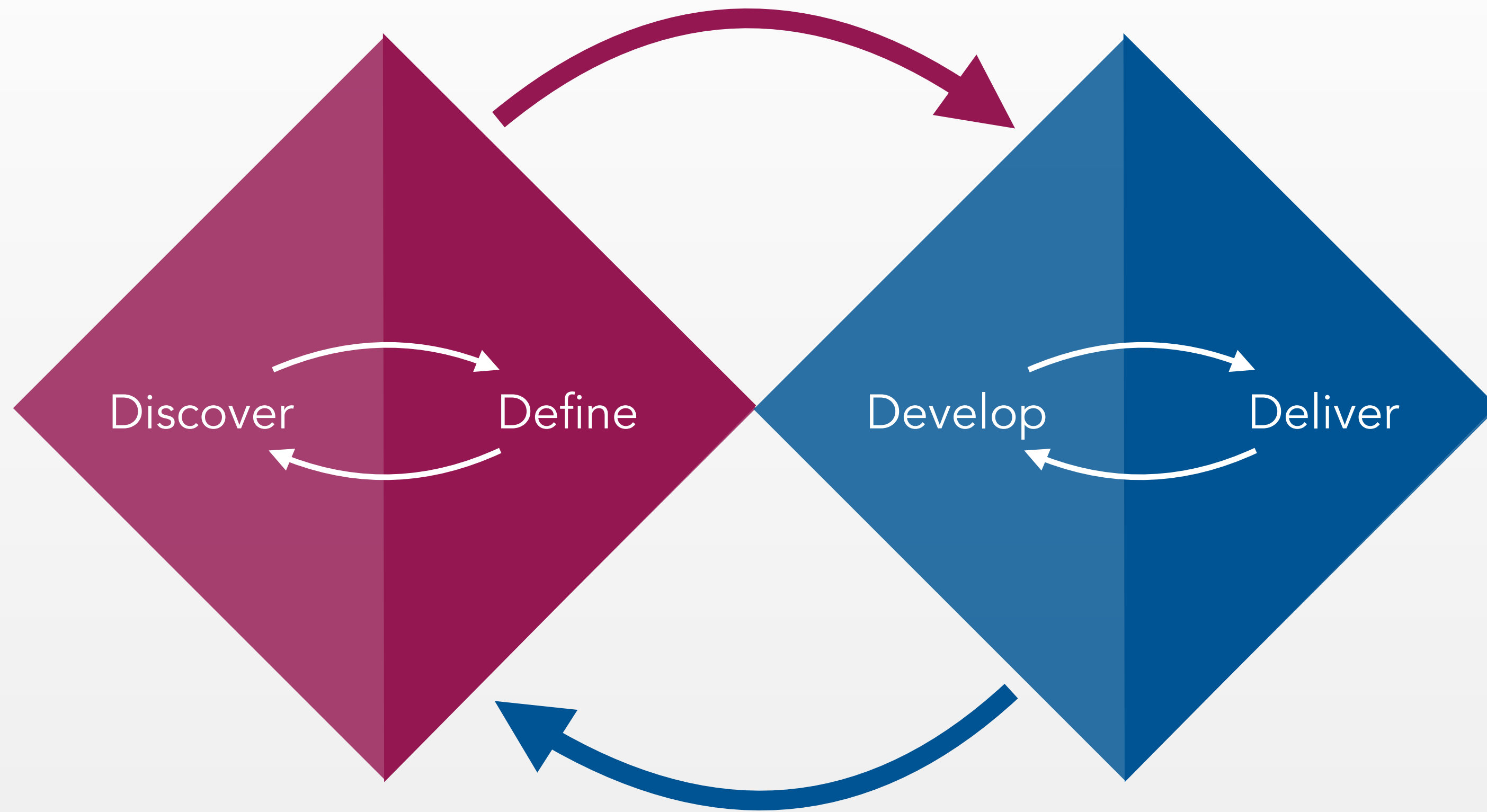
...or your mobile app

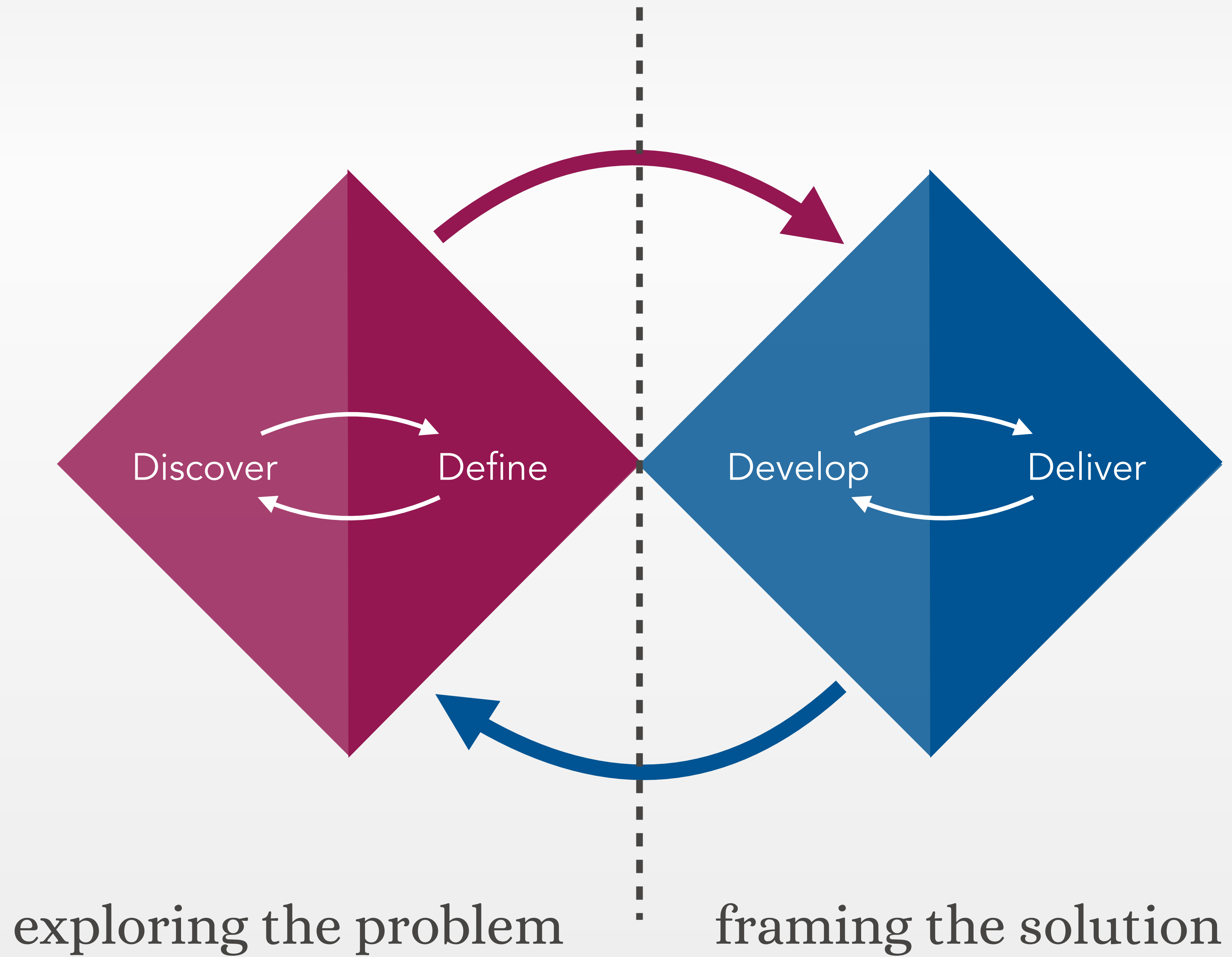
How do we fix a problem before it becomes a problem?

How do we fix existing pain points?

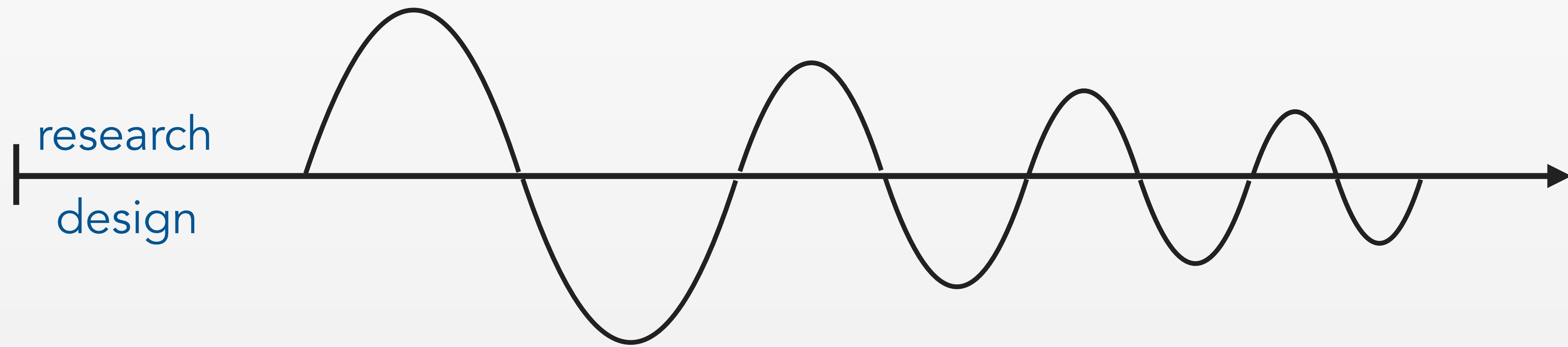
Research serves to understand why
people make the decisions they do.

(From little ones to big ones.)

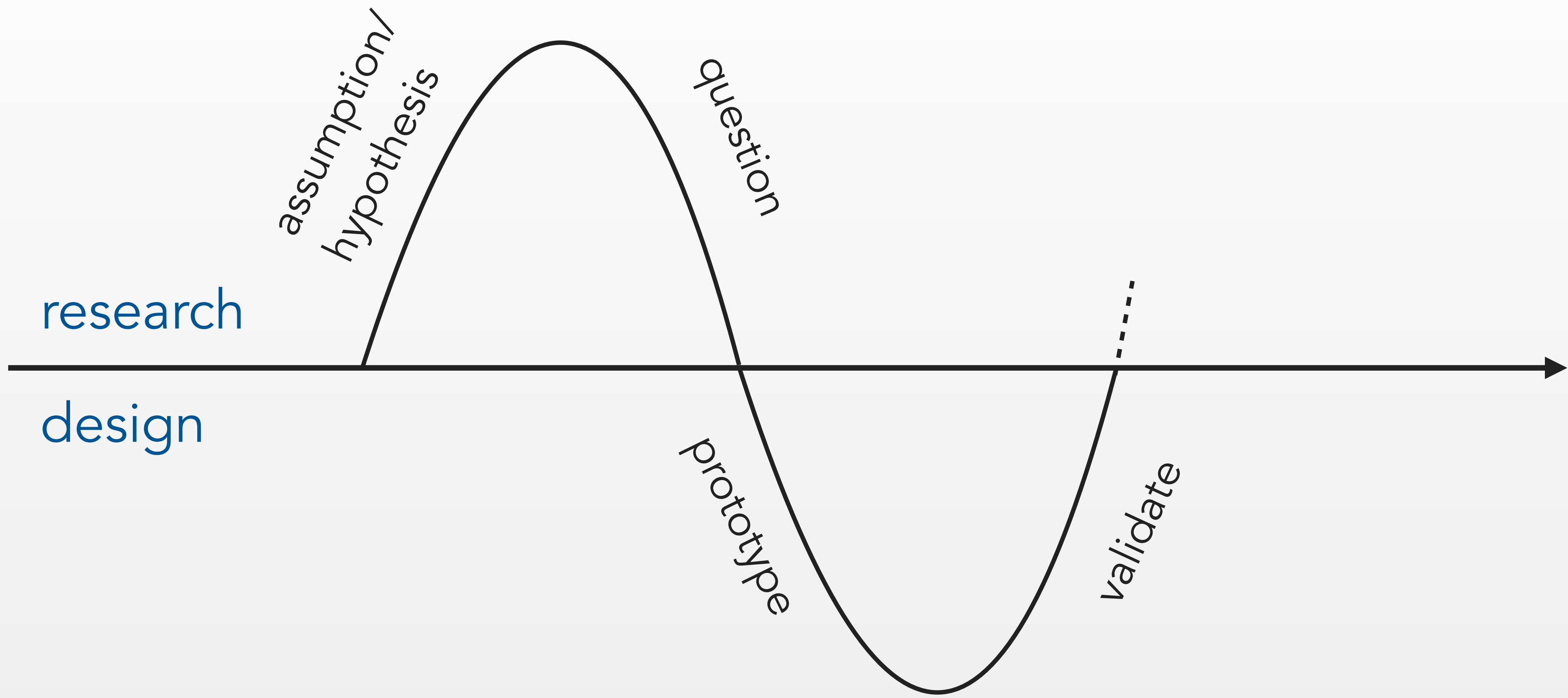




**broad
understanding**



**deep
comprehension**



Good design is hypothesis-
and evidence- driven.

Key Skills

1. Pinpoint the real goals of the research
2. Identify what we want to learn
3. Identifying assumptions & hypotheses
4. Designing the research & define the methodology
5. Determining the most appropriate audience and sample
6. Designing research sessions
7. Run the research 🙌
8. Analysing and synthesising
9. Presenting and sharing insights



Why research objectives?



Research objectives state **a clear goal** for what you are looking to achieve.

Not only will it guide you in designing the research, it is an instrument for you and your team to **align on research outcomes.**

Why research objectives?

Research objectives also help you determine the **appropriate methodology.**

Thinking about Real People

Thinking about real people



User research seeks to understand people's relationship to products and services in real contexts.

- What are their needs?
- What do we know about their behaviours, motivations, triggers and barriers?
- What causes them to make certain decisions?

Who chooses which?



Who chooses which?



Capturing user needs

User needs statement (also “user story”):

As a { user role / persona }

I need to { do what I need to do }

In order to { accomplish goal }

Capturing user needs

User needs statement (also “user story”):

As a commuter

I need to carry all my things safely

In order to have everything I need for work

Capturing user needs

There are a few variations, e.g.:

As a { who }

I want to { do what }

So that I can { have an outcome (why) }

Capturing user needs

Job story:

When { *situation or context* }

I want to { do what }

So that I can { *have an outcome (why)* }

Capturing user needs

Job story:

When *I'm commuting*

I want to *have easy access to my laptop*

So that *I can get some work done on the way*

How would you express your needs?



Product promise & value proposition

Product promise

User research seeks to understand people's **relationship** to products and services in a real contexts.

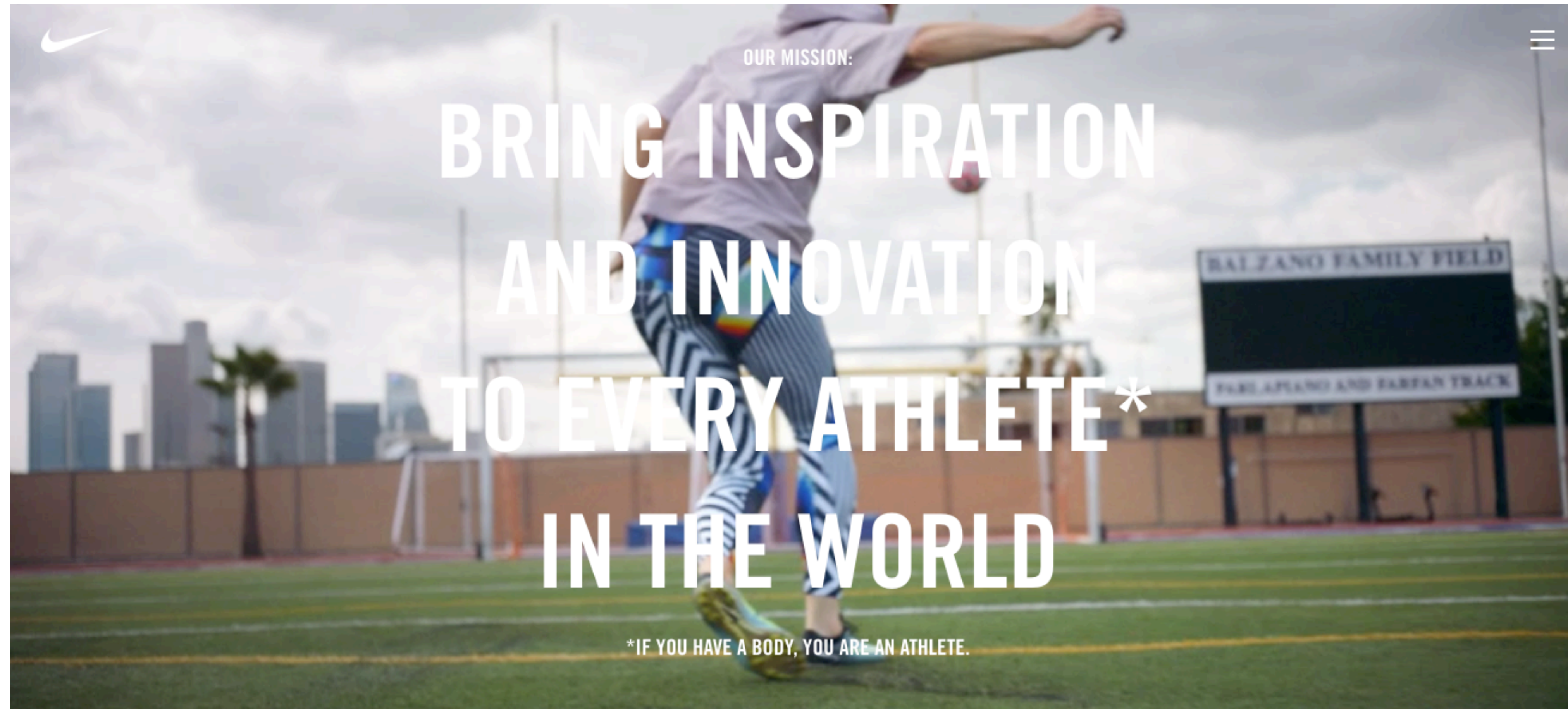
- What is the promise the product/service is making to your users?
- Is it successful at meeting that promise?

Promise, brand & value proposition



The Nike Court Vintage Premium embodies '80s tennis at its best—laid-back and stylish. The smooth leather upper combines with micro-branding for a relaxed look and feel, while the cushioned sockliner provides comfort for every step.

Promise, brand & value proposition



<https://about.nike.com/>

Promise, brand & value proposition

WOOL RUNNER-UP MIZZLE HIGHLIGHTS



Thick Wool High
Top For The
Cold



No-Slip Natural
Rubber Grip



Designed To
Repel The
Weather

CORE FEATURES

- Renewable Materials
- Machine Washable
- Minimises Odour
- Flexibly Conforms To Your Movements

DESCRIPTION

Our wet-weather high top is made with ZQ Merino wool and a bio-based water repellent shield, so your feet stay dry and cozy no matter what the day brings. Made in Busan, South Korea



Cosy High Top, Stormy Weather

Promise, brand & value proposition



SIMPLICITY IN DESIGN

No flashy logos. No senseless details. Just the world's most comfortable shoes, made naturally and designed practically. It's that simple.

CONFIDENCE IN COMFORT

Trying is believing. Give our shoes a shot for 30 days, and if you're not walking on cloud nine, we'll take them back—no questions asked.

MADE FROM NATURE

The footwear industry often overlooks Mother Nature's materials in favour of cheaper, synthetic alternatives. We think it's time to change that.

Assumptions & Hypotheses

Assumptions & Hypotheses



Assumptions

- *Most of our customers who are struggling to do X.*
- *We don't need to provide this functionality because no one would use it.*

Hypotheses or testable assertions

- *Our customers are struggling to do X because Y.*
- *If our customers do X, Y happens.*

Assumptions & Hypotheses



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Hypotheses or testable assertions

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Research Methods: Usability Testing

Usability — a definition



Usability is defined by 5 quality components:

- **Learnability:** How easy is it for users to accomplish basic tasks the first time they encounter the design?
- **Efficiency:** Once users have learned the design, how quickly can they perform tasks?
- **Memorability:** When users return to the design after a period of not using it, how easily can they reestablish proficiency?
- **Errors:** How many errors do users make, how severe are these errors, and how easily can they recover from the errors?
- **Satisfaction:** How pleasant is it to use the design?

<https://www.nngroup.com/articles/usability-101-introduction-to-usability/>

Usability Testing



Core components of a usability test involve testing for:

- **Comprehension & learnability:** does the user understand? How quickly do they “get it”?
- **Findability:** can they find their way around?
- **Efficiency:** how quickly or effectively can do they what they want to do?
- **Memorability:** if they go away and come back, do they remember what to do?
- **Errors:** How many mistakes do they make, and how easily do users recover?

Writing good tasks



Make the Task Realistic

User goal: Browse product offerings and purchase an item.

Poor task: Purchase a pair of orange Nike running shoes.

Better task: Buy a pair of shoes for under \$40.

Make the Task Actionable

User goal: Find movie and show times.

Poor task: You want to see a movie Sunday afternoon. Go to www.fandango.com and tell me where you'd click next.

Better task: Use www.fandango.com to find a movie you'd be interested in seeing on Sunday afternoon.

<https://www.nngroup.com/articles/task-scenarios-usability-testing/>

Writing good tasks



Avoid Clues and Describing the Steps

User goal: Look up grades.

Poor task: You want to see the results of your midterm exams. Go to the website, sign in, and tell me where you would click to get your transcript.

Better task: Look up the results of your midterm exams.

<https://www.nngroup.com/articles/task-scenarios-usability-testing/>

Writing good tasks



- **Avoid giving clues in the scenario.** Don't use uncommon or unique words used in your website or app. Testers will scan the screen to find these words and you won't get many insights about the usability of your website.
- **Write in a clear, understandable, and easy to follow way.** Write the way you talk and don't try to sound scientific or academic. Pre-test your tasks with colleagues or friends to make sure they are easy to understand and people really know what you want them to do.

<https://userbrain.net/blog/write-better-tasks-to-improve-usability-testing>

Writing good tasks



- **Trim any detail that's not absolutely necessary.** Your task scenarios should set a context and provide users with necessary details like a username or a special delivery address. Everything else is unnecessary.
- **Keep your task scenarios as short as possible** and let testers figure out things for themselves.

<https://userbrain.net/blog/write-better-tasks-to-improve-usability-testing>

Keep the goal in mind



The main goal is to get the participants to simulate going through the scenarios in as real a situation as possible.

So, sometimes, you might have to get creative, e.g. the Bollywood technique.

A solid blue triangular shape pointing downwards from the top-left corner of the slide, extending diagonally across the upper portion of the page.

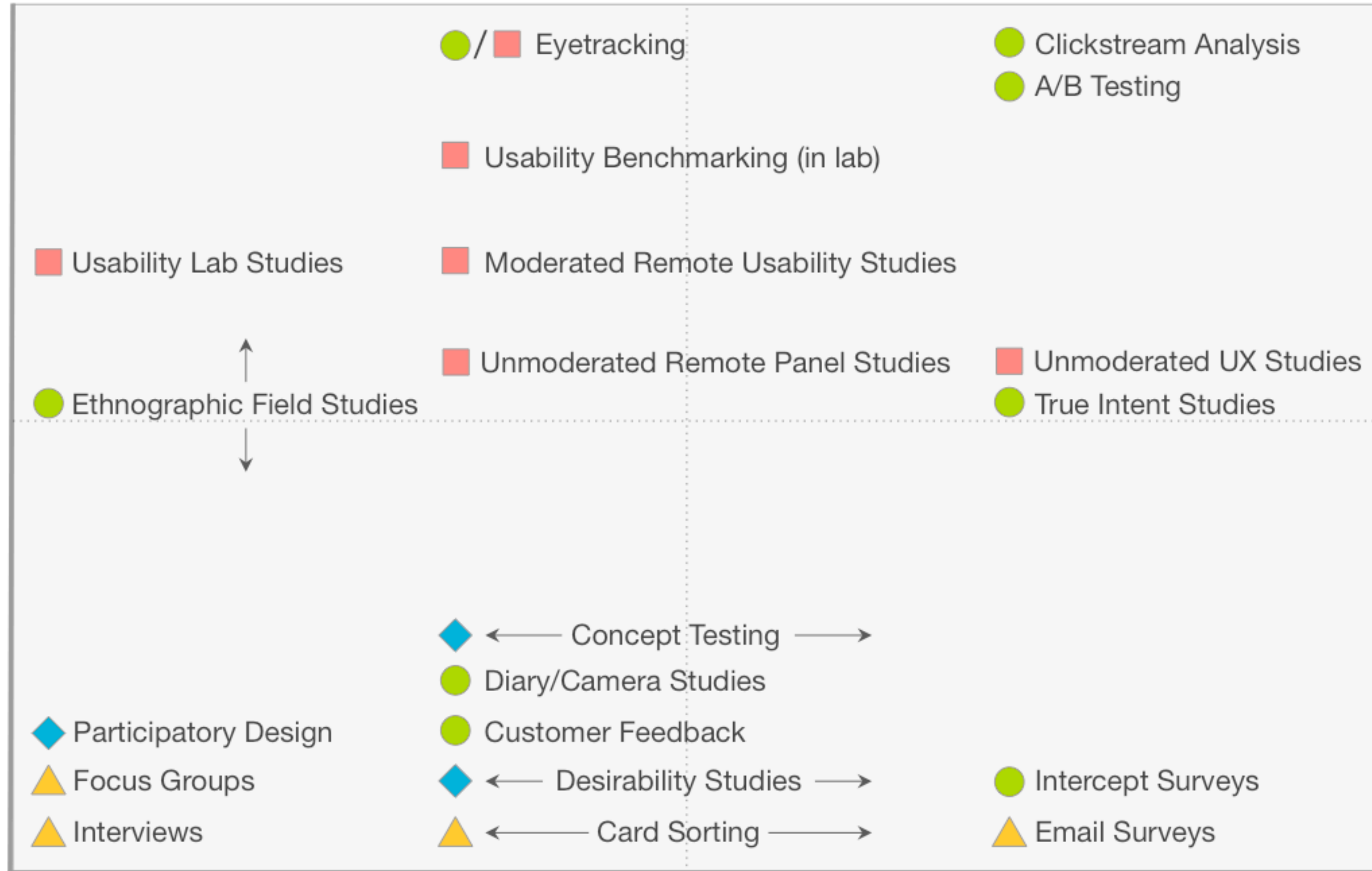
Research Methods

(continued)

A LANDSCAPE OF USER RESEARCH METHODS

BEHAVIORAL

how they behave



QUALITATIVE (DIRECT)

QUANTITATIVE (INDIRECT)

what they think

ATTITUDINAL

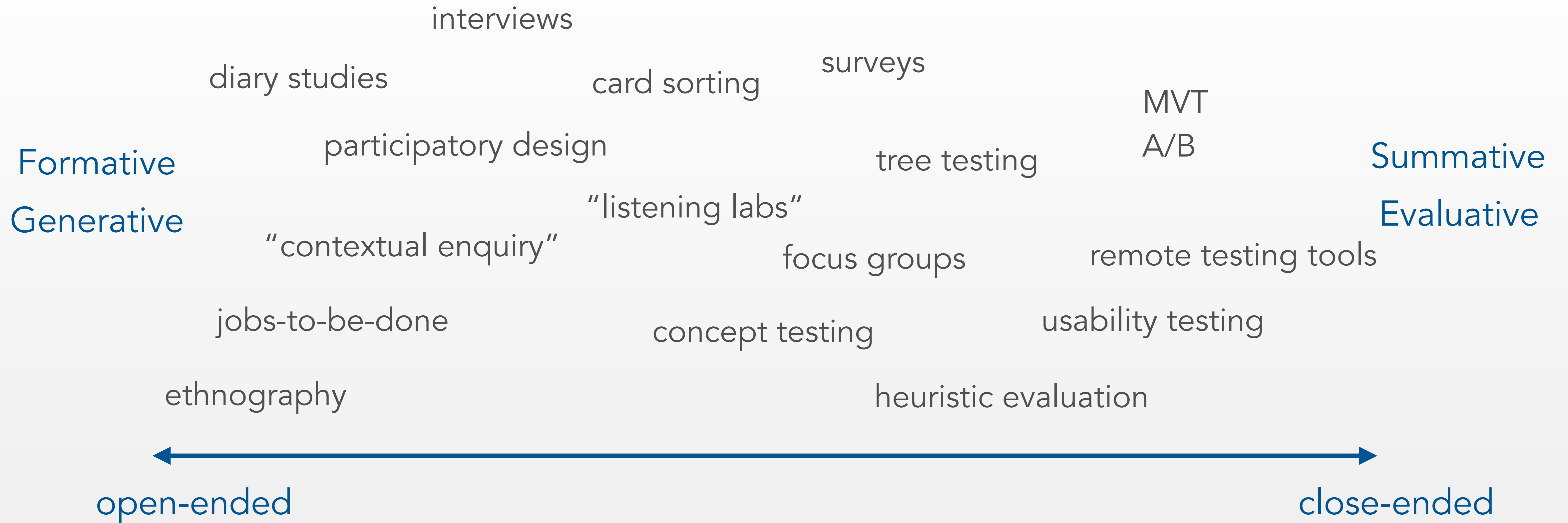
KEY FOR CONTEXT OF PRODUCT USE DURING DATA COLLECTION

- Natural use of product
- Scripted (often lab-based) use of product
- ▲ De-contextualized / not using product
- ◆ Combination / hybrid

© 2014
Christian Rohrer

<http://www.nngroup.com/articles/which-ux-research-methods/>

Which research method?



Participatory Design Research



Co-design sessions can be conducted in a group or 1-1.

They are structured to help us understand:

- Mental models & use cases
- Pain points
- Triggers & Motivations
- Whether a value proposition resonates with the customer
- “Edge cases”

Outcome of sessions can be powerful in providing design direction.

Concept Testing



Concept testing can take various different forms, and can include prototypes of different fidelities.

You can learn/validate mental models, or comprehension of value proposition from a concept test, but you may also unearth usability issues in early design.

Concept tests are good for validating existing ideas, a series of concept tests can be good for iterating on a prototype.

Tree-testing



BHCC - City Clean

Upgraded Draft Tree Test | Created Mar 21, 2017

Save Preview Launch

Settings Tree Tasks Messages Questionnaire Appearance Recruit

Tree ?

Expand all Collapse all

Bulk Import Export Delete tree



Options

Randomize the tree order ?

https://www.optimalworkshop.com/a/clearleft1/treejack/surveys/84438/edit#



Tree-testing



- ▼ RECYCLING
 - ▶ CHARITY SERVICES
 - ▶ COMMERCIAL SERVICES
 - ▶ COMMUNAL SERVICES
 - ▶ REPORTING PROBLEMS
 - ▶ RUBBISH AND RECYCLING COLLECTION
 - ▶ RECYCLING POINTS AND CENTRES (TIPS)
 - ▶ NON-STANDARD WASTE AND RECYCLING
 - ▶ GARDEN WASTE
- ▼ BINS
 - ↳ Wheelie bin recycling trial
 - ↳ Recycling bins map
 - ↳ Recycling or Refuse left out early or all the time
 - ↳ Report a missed recycling collection
 - ↳ Learn what you can recycle
 - ↳ Request new rubbish or recycling bin
- ▶ MAPS
- ▶ STREET CLEANING
- ▶ REDUCING YOUR WASTE
- ▶ COMMUNITY SERVICES
- ▶ CITYCLEAN SERVICE
- ▼ STREETS
 - ▶ STREET MAINTENANCE

Rapid Iterative Research



The “RITE” (Rapid Iterative Testing & Evaluation) method means you iterate your prototype or stimuli on the fly so you gain insights in the shortest amount of time.

Contextual Research

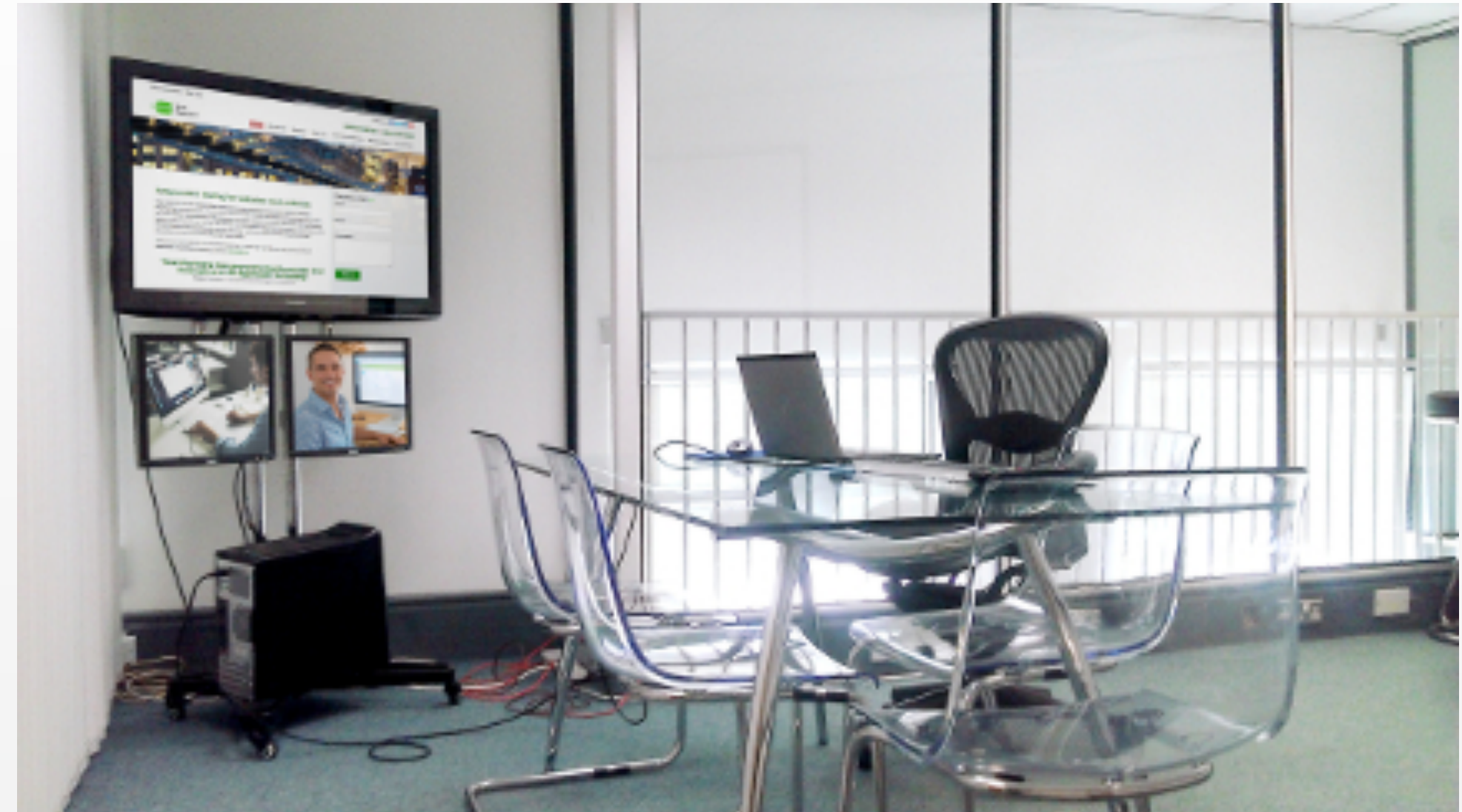
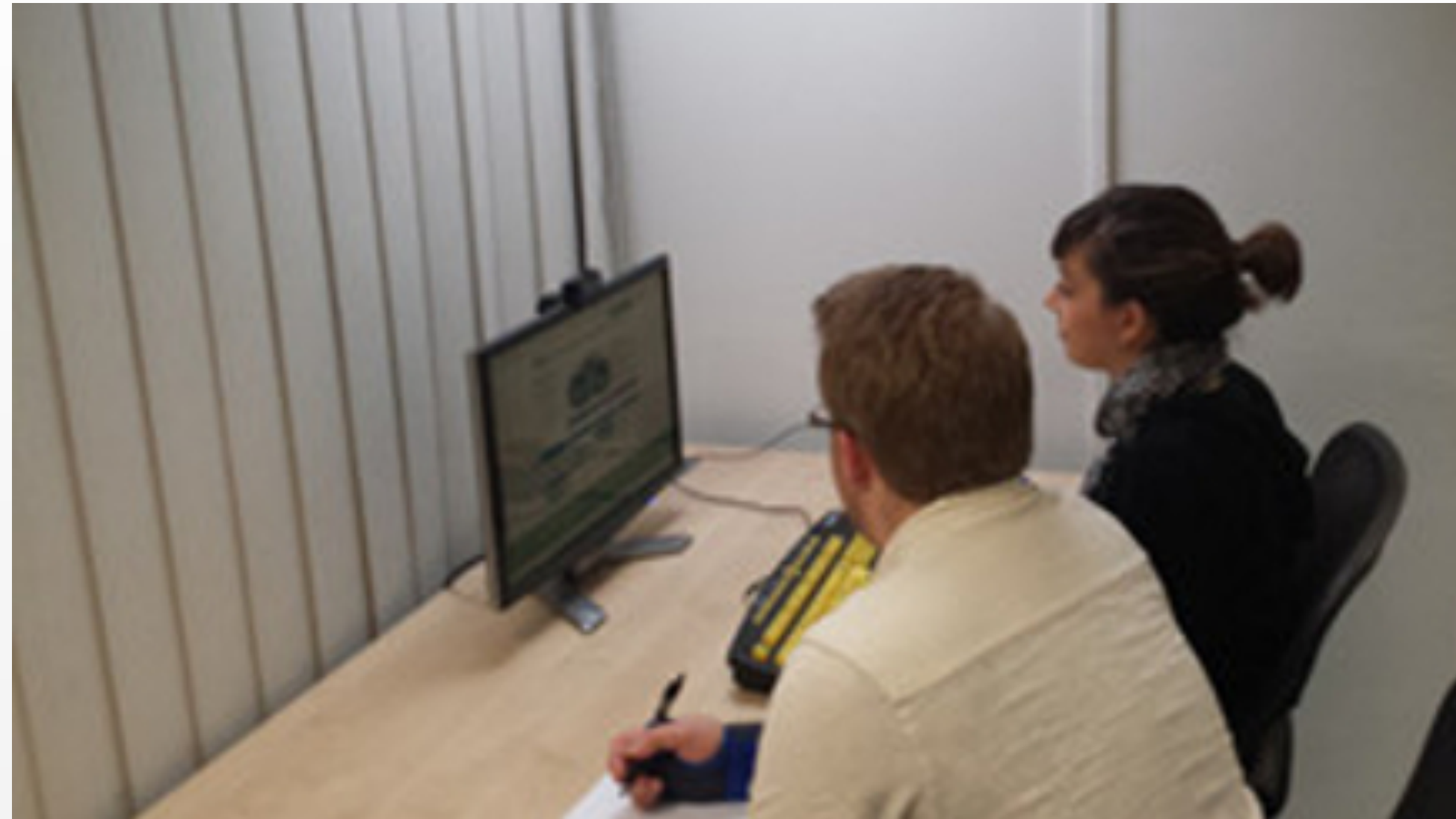
Conducting interviews with users in their normal day-to-day contexts when they may be using your product or service, combined with observation.



Research Considerations

In-person vs. remote research

Testing in a Lab



Moderated vs. Unmoderated Research

Qualitative vs. Quantitative?

Inductive reasoning,
Deductive reasoning



<https://fivesecondtest.com/>

<https://usabilityhub.com/>

<https://www.optimalworkshop.com/>

<https://www.loop11.com/>

See also [ResearchOps Community toolbox](#).

A word about ethics

How to be ethical?



Your participant's wellbeing is your topmost priority.

- Be honest about your research intentions
- Be transparent about the outcome of the research
- Be clear to your participant about what happens to their data afterwards: how is it used, how is it stored, who sees it, when it will be deleted.

How to be ethical?



- Ensure participants understand what they are consenting to
- Be mindful about handling sensitive information (e.g. contact info, health conditions)
- Be truthful and responsible about representing their views accurately
- Allow your participant to opt-out anytime

A Quick Note on Cognitive Biases

What is a cognitive bias?

A cognitive bias refers to the systemic pattern of deviation from norm or rationality in judgement, whereby inferences about other people and situations may be drawn in an illogical fashion. Individuals create their own “subjective social reality” from their perception of the input.

— Wikipedia

What is a cognitive bias?

In other words, it's a set of mental shortcuts all of us have, to varying degrees to help us interpret the world around us and to act on it.



20 COGNITIVE BIASES THAT SCREW UP YOUR DECISIONS

1. Anchoring bias.

People are **over-reliant** on the first piece of information they hear. In a salary negotiation, whoever makes the first offer establishes a range of reasonable possibilities in each person's mind.



2. Availability heuristic.

People **overestimate the importance** of information that is available to them. A person might argue that smoking is not unhealthy because they know someone who lived to 100 and smoked three packs a day.



3. Bandwagon effect.

The probability of one person adopting a belief increases based on the number of people who hold that belief. This is a powerful form of **groupthink** and is reason why meetings are often unproductive.



4. Blind-spot bias.

Failing to recognize your own cognitive biases is a bias in itself. People notice cognitive and motivational biases much more in others than in themselves.



5. Choice-supportive bias.

When you choose something, you tend to feel positive about it, even if that **choice has flaws**. Like how you think your dog is awesome — even if it bites people every once in a while.



6. Clustering illusion.

This is the tendency to **see patterns in random events**. It is key to various gambling fallacies, like the idea that red is more or less likely to turn up on a roulette table after a string of reds.



7. Confirmation bias.

We tend to listen only to information that confirms our **preconceptions** — one of the many reasons it's so hard to have an intelligent conversation about climate change.



8. Conservatism bias.

Where people favor prior evidence over new evidence or information that has emerged. People were **slow to accept** that the Earth was round because they maintained their earlier understanding that the planet was flat.



9. Information bias.

The tendency to **seek information when it does not affect action**. More information is not always better. With less information, people can often make more accurate predictions.



10. Ostrich effect.

The decision to **ignore dangerous or negative information** by "burying" one's head in the sand, like an ostrich. Research suggests that investors check the value of their holdings significantly less often during bad markets.



11. Outcome bias.

Judging a decision based on the **outcome** — rather than how exactly the decision was made in the moment. Just because you won a lot in Vegas doesn't mean gambling your money was a smart decision.



12. Overconfidence.

Some of us are **too confident about our abilities**, and this causes us to take greater risks in our daily lives. Experts are more prone to this bias than laypeople, since they are more convinced that they are right.



13. Placebo effect.

When **simply believing** that something will have a certain effect on you causes it to have that effect. In medicine, people given fake pills often experience the same physiological effects as people given the real thing.



14. Pro-innovation bias.

When a proponent of an innovation tends to **overvalue its usefulness** and undervalue its limitations. Sound familiar, Silicon Valley?



15. Recency.

The tendency to weigh the **latest information** more heavily than older data. Investors often think the market will always look the way it looks today and make unwise decisions.



16. Salience.

Our tendency to focus on the **most easily recognizable features** of a person or concept. When you think about dying, you might worry about being mauled by a lion, as opposed to what is statistically more likely, like dying in a car accident.



17. Selective perception.

Allowing our expectations to **influence how we perceive** the world. An experiment involving a football game between students from two universities showed that one team saw the opposing team commit more infractions.



18. Stereotyping.

Expecting a group or person to have certain qualities without having real information about the person. It allows us to quickly identify strangers as friends or enemies, but people tend to **overuse and abuse** it.



19. Survivorship bias.

An error that comes from focusing only on surviving examples, causing us to **misjudge a situation**. For instance, we might think that being an entrepreneur is easy because we haven't heard of all those who failed.



20. Zero-risk bias.

Sociologists have found that **we love certainty** — even if it's counterproductive. Eliminating risk entirely means there is no chance of harm being caused.



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<http://mentalfloss.com/article/68705/20-cognitive-biases-affect-your-decisions>

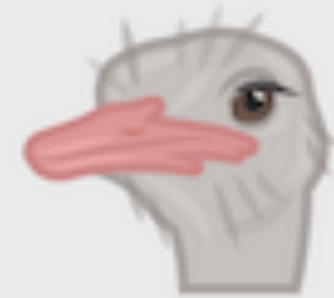
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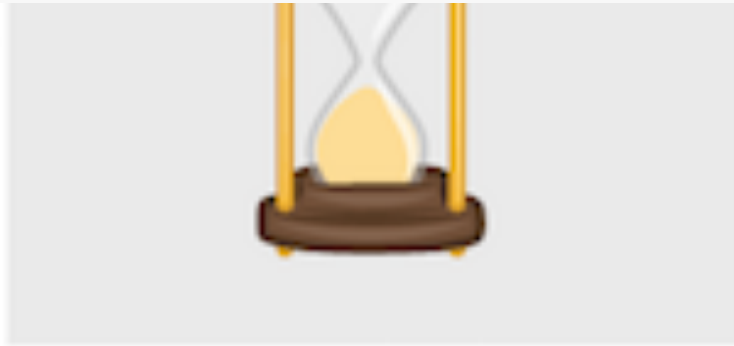
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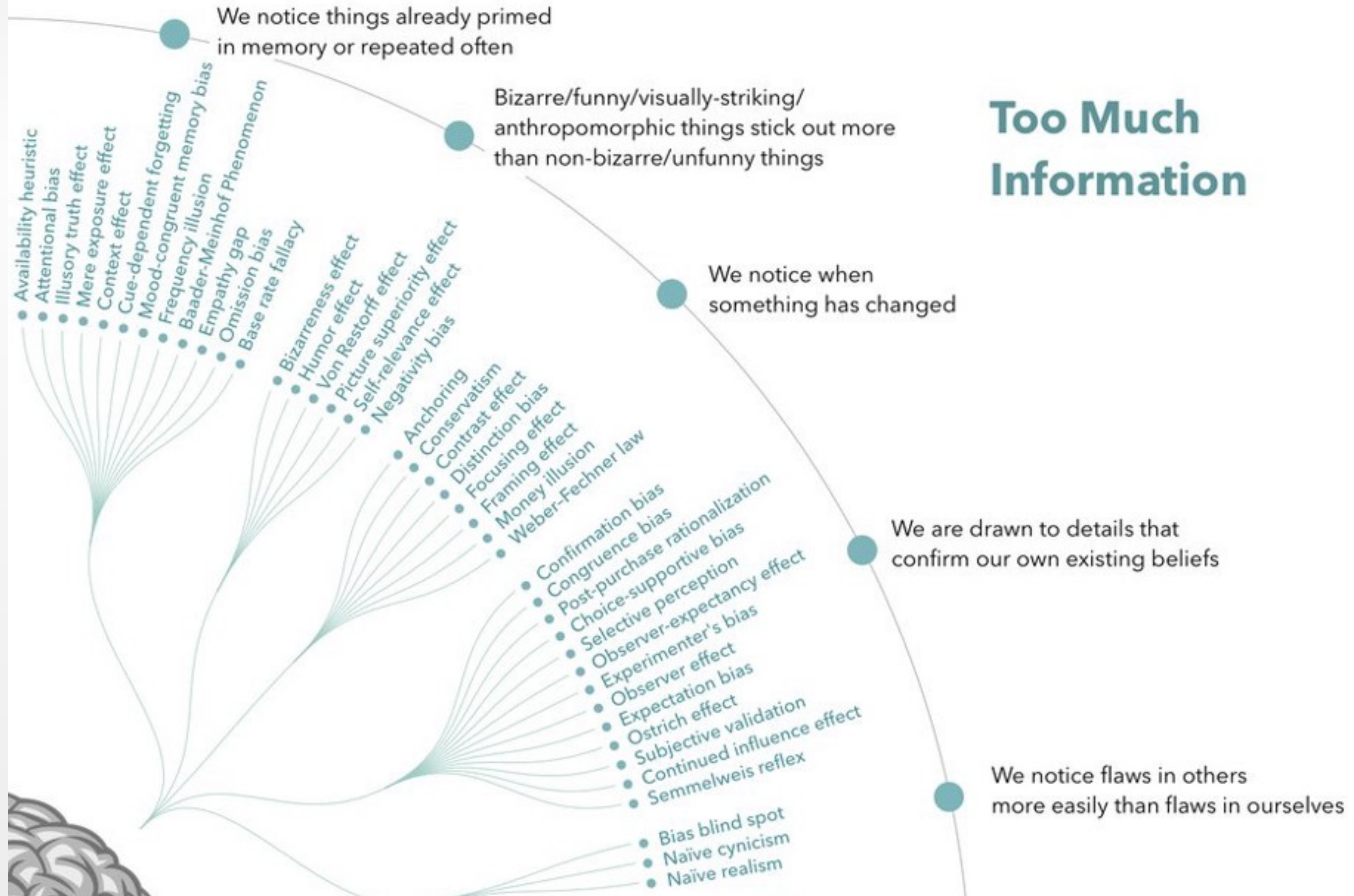


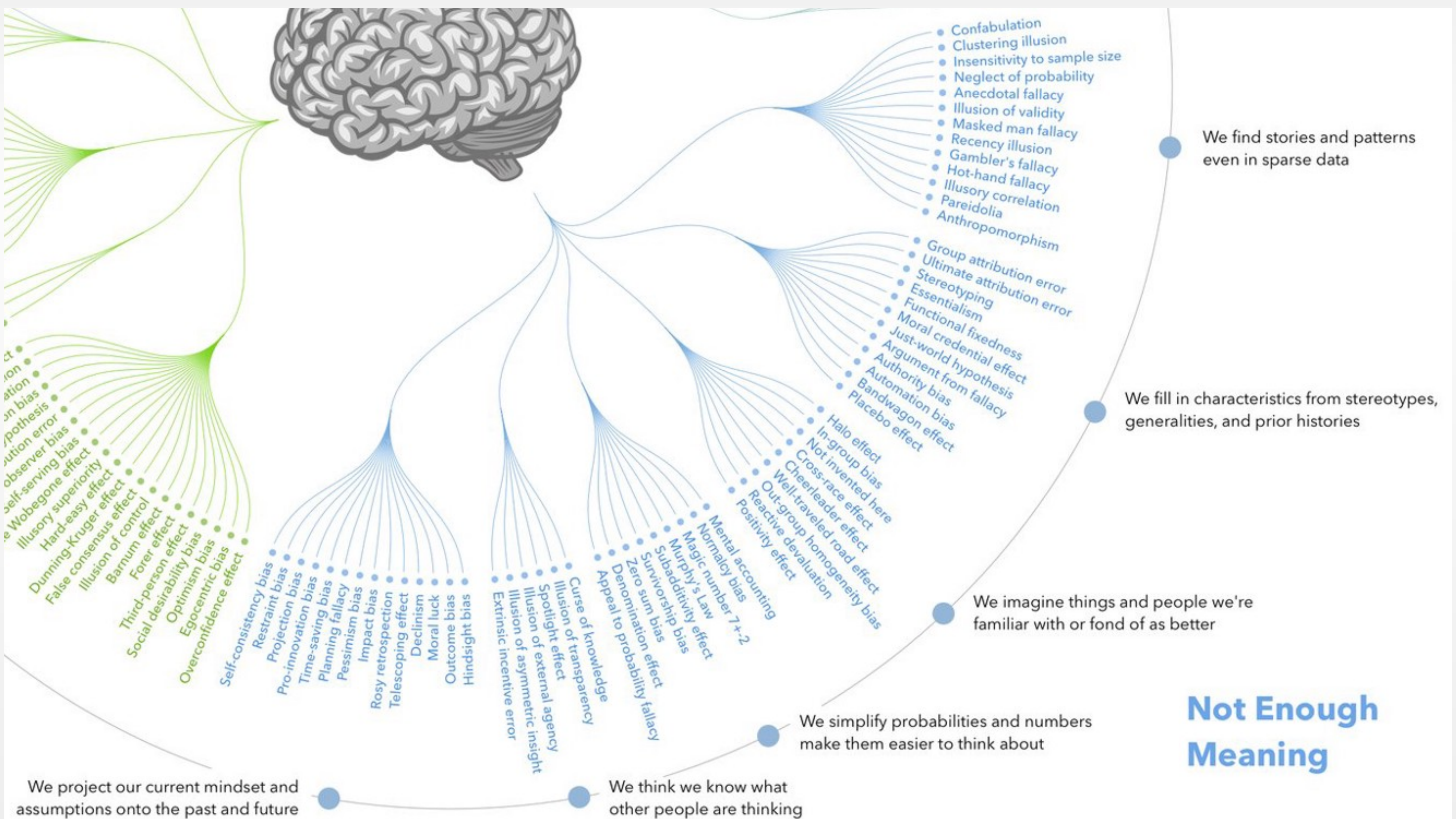
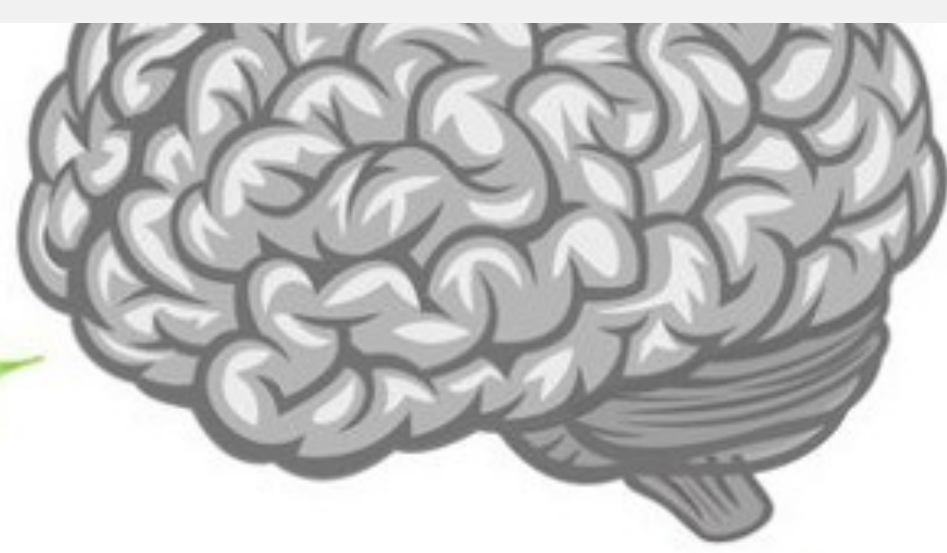
SOURCES: Brain Biases; Ethics Unwrapped; Explorable; Harvard Magazine; HowStuffWorks; LearnVest; Outcome bias in decision evaluation, Journal of Personality and Social Psychology; Psychology Today; The Bias Blind Spot: Perceptions of Bias in Self Versus Others, Personality and Social Psychology Bulletin; The Cognitive Effects of Mass Communication, Theory and Research in Mass Communications; The less-is-more effect: Predictions and tests, Judgment and Decision Making; The New York Times; The Wall Street Journal; Wikipedia; You Are Not So Smart; ZhurnalyWiki

BUSINESS INSIDER

<http://mentalfloss.com/article/68705/20-cognitive-biases-affect-your-decisions>

Too Much Information





Not Enough Meaning

We favor simple-looking options and complete information over complex, ambiguous options

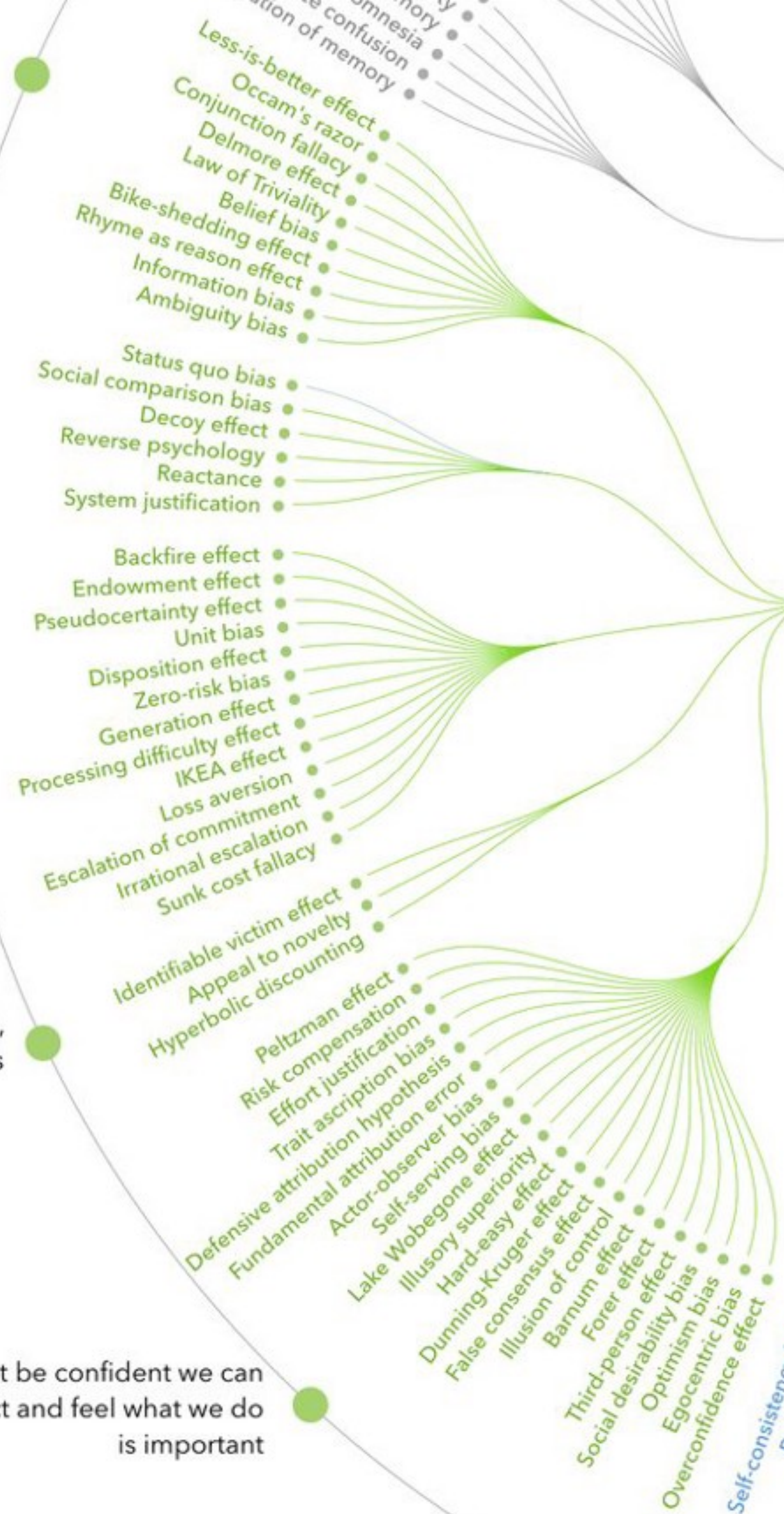
To avoid mistakes, we're motivated to preserve our autonomy and status in a group, and to avoid irreversible decisions

To get things done, we tend to complete things we've invested time & energy in

To stay focused, we favor the immediate, relatable thing in front of us

Need To Act Fast

To act, we must be confident we can make an impact and feel what we do is important



What Should We Remember?

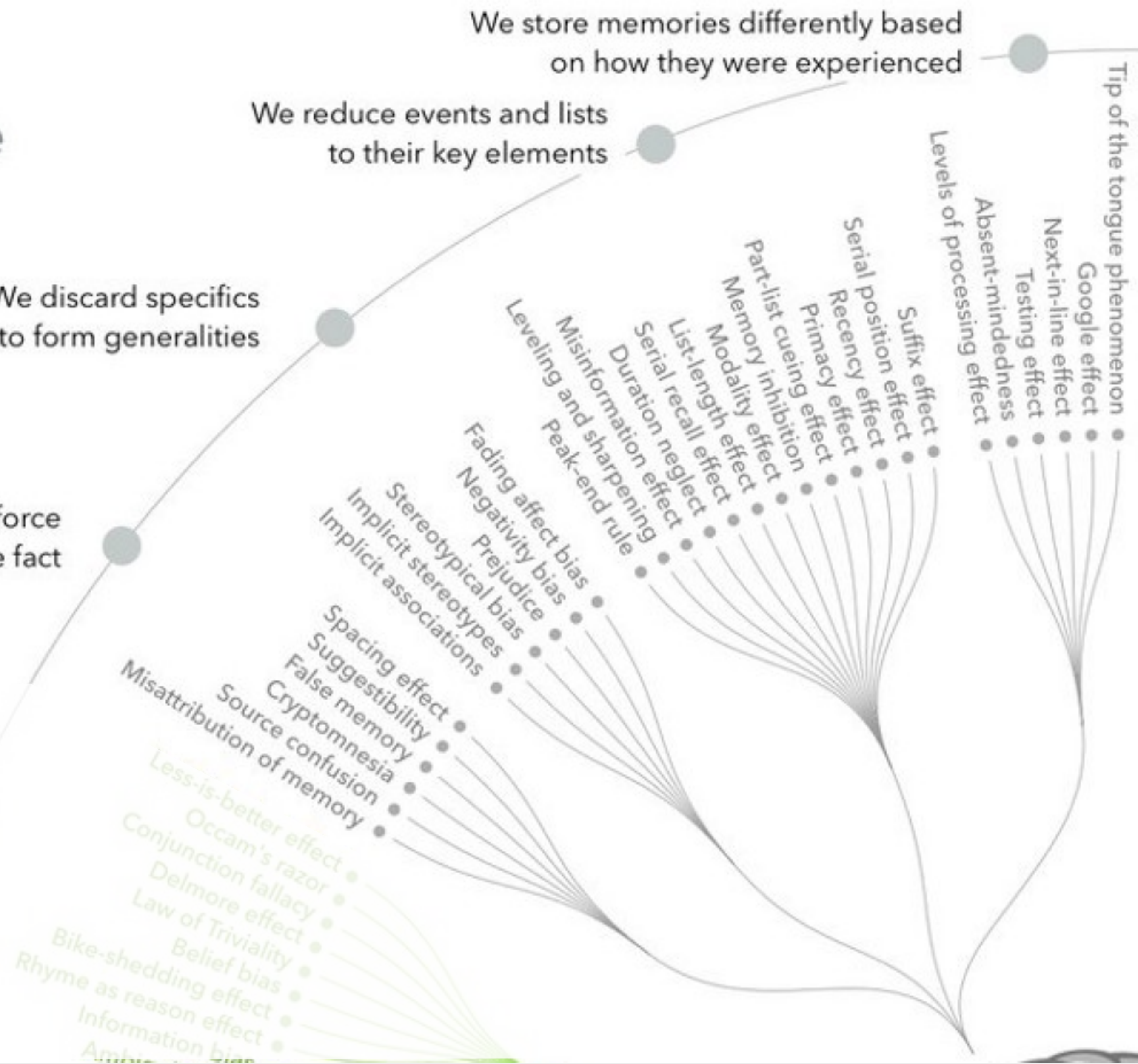
Simple-looking options and complete over complex, ambiguous options

We edit and reinforce some memories after the fact

We discard specifics to form generalities

We reduce events and lists to their key elements

We store memories differently based on how they were experienced



The Craft of Questions

The Craft of Questions



You have to know what your questions mean — *what decisions they inform* — before you ask them.

—Erika Hall

Questions to gather context



Sequence	What do you do when you are trying decide on a bottle? Then, what do you do next?
Quantity	How many options are too many?
Specific examples	What was the purchase you made?
Complete list	What are all the different types of bottles you have used?
Relationships	How do you go about buying for someone else?
Organisational structure	Is your team part of a greater department?

Adapted from Portugal/gotomedia, "Synthesis to Ideation"

Questions to uncover the unsaid

Clarification	When you refer to 'that', what do you mean?
Code words / native language	Why do you call it ...?
Emotional cues	Why did you laugh when you opened the door?
Why	Why do you think you found it difficult?
Probe delicately	You mentioned that it was tricky. Can you tell me more?
Probe without presuming	Some people really don't like using that. What are your thoughts?

Adapted from Portugal/gotomedia, "Synthesis to Ideation"

Questions to uncover mental models



Compare processes	What's the difference between buying online and buying in a shop?
Compare to others	Is it the same in another shop?
Compare across time	How different do you think it will be 5 years from now?

Adapted from Portigal/gotomedia, "Synthesis to Ideation"

Quantitative variables

Continuous	Discrete	Categorical
<ul style="list-style-type: none">• Temperature• A train's top speed• Typing speed• Level of anxiety	<ul style="list-style-type: none">• Number of goals scored in a football match• Number of reported issues on a piece of software• Number of people you meet while at a cafe• Attendances at a concert	<ul style="list-style-type: none">• Gender/sex at birth• Occupation• Favourite Colour• Type of restaurant

Adapted from Dancey and Reidy, J, "Statistics without Maths for Psychology", 7th ed. (2017)

Updated guidance on gender/sex question



The Office for National Statistics conducted rehearsals for questions around sex at birth and gender identity for the 2021 census.

See [final guidance](#).

Discrete variable



1. How many pizzas do you eat in a month?

- 0 — I don't eat pizzas
- 1 to 5
- 6 to 10
- More than 10

Continuous variable



2. How hot or cold do you like to eat your pizza?

Cold from the
fridge

Piping hot from
the oven

N/A — I never eat
pizzas.

Categorical variable



3. What do you like to have on your pizza?

- | | |
|---|-------------------------------------|
| <input type="checkbox"/> Mozzarella | <input type="checkbox"/> Anchovies |
| <input type="checkbox"/> Tomato sauce | <input type="checkbox"/> Artichokes |
| <input type="checkbox"/> Mushrooms | <input type="checkbox"/> Salami |
| <input type="checkbox"/> Olives | <input type="checkbox"/> Prosciutto |
| <input type="checkbox"/> Other (please specify) | |

Open fields



4. Tell me about the worst pizza you've ever had.

5. What's the best pizza you've ever had?

Example interview questions



- Tell me about the last time you bought a pizza.
 - How many pizzas did you buy?
 - Were you sharing? Who were you sharing it with?
- How did you order your pizzas?
- What happened when you made the order?

Some rule of thumbs



In a survey:

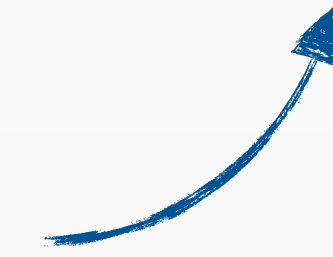
- Questions need to be clear and unambiguous. (*Hint: it's always best to test your questions before releasing it.*)
- Surveys perform best with "closed" questions.
- Use open fields sparingly.

In an interview:

- Keep your interview questions "open" (why, when, how).
- Use "closed" questions only for validation.

what's already out there?

Create realistic questions.



Start by looking for inspiration and domain know-how.

(This can also feed into a competitor analysis.)

Interviewing Users

by

Steve Portigal

<http://www.portigal.com/seventeen-types-of-interviewing-questions/>



Rob Fitzpatrick

a Founder Centric book

The Mom Test

by

Rob Fitzpatrick

<http://momtestbook.com/>



THE MOM TEST

How to talk to customers and learn if your business is a good idea when everyone is lying to you.



A basic guideline



1. Intro: how will you set the scene?
2. Background: who are they? what do they do?
3. Get specific: are there specific stories they can tell you?
4. Get comparisons: what's been good? what's bad?
5. Dream question: imagine if, what if...?
6. Wrap-up: how will you close the interview?
7. What observations to take note of?
8. What sort of timing would you plan for?

Rose, Bud & Thorn Analysis

Sort your findings by:

- Roses — Good experiences & positive things
- Buds — Opportunities for improvements
- Thorns — Negative things & pain points

Analysis with affinity diagramming (1)

In your group, do a quick affinity-sort.

1. Translate your findings to stickies, one point per stickies. (5 mins)
2. Affinity-sort your findings. (15 mins). Chunk according to subject: direct quotes, a need, a requirement, a problem, a complaint, emotional reactions, a desire.
3. Summarise some key points. (5 mins)

Analysis with affinity diagramming (2)

- Look to confirm or challenge any hypotheses or assumptions.
- Look for things that occur often and the one-off unique perspective.
- What relationships emerge between data chunks?
- How frequently do topics occur?
- What are the metaphors or language people used?
- Can we make a time-based interpretation?
- Can we map obvious cause and effect? (2x2)

Synthesis

Because qualitative research tends to have a sample, it doesn't make sense to use percentages. Instead, summarise your findings using phrases such as:

- Majority of participants [expressed]...
- Most participants [did] ...
- Half of participants [thought] ...
- Some of the participants [believed] ...
- None of the participants [understood] ...

The End

Steph Troeth