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The Use of Financial Incentives in Qualitative Research across Disciplines in the United States: A Methodological Review from 1995 to 2021

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Abstract

Offering financial incentives to participants for their participation in qualitative research is a common practice that improves recruitment in a study. However, the state of incentive use in qualitative research across fields is unknown. This methodological review aimed to examine the state of incentive use in qualitative research across fields in the context of the United States. Using descriptive statistics and negative binomial regression, we examined 698 cases of incentives for 627 unique full-text empirical qualitative research articles and determined the influencing factors for the amounts of incentives used in qualitative research studies. The results showed that publication year, field of research, and sample size function as influencing factors in the amount of incentives offered in qualitative studies. Of the 698 cases identified through the systematic search, incentive amounts (US Dollar) varied from minimum $5.00 to maximum $500.00 with mean of $31.7 (SD=32.1). The incentive amounts (US Dollar) with the inflation rate varied from $5.00 to maximum $565.00 with a mean of $36.6 (SD=37.4). Our study suggests that incentives in qualitative research are shaped by disciplinary and methodological contexts, and our review provides practical implications to guide researchers' decisions. This study ignites a deeper dialogue about the use of incentives in qualitative research and reporting practices to assist researchers in enhancing the effectiveness of using incentives within their respective fields.

Keywords: Financial Incentives, Qualitative Research, Trends

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Amerika Birleşik Devletleri'nde Disiplinler Arası Nitel Araştırmalarda Finansal Teşvik Kullanımı: 1995–2021 Yılları Arasında Yöntemsel Bir Derleme

Öz

Nitel araştırmalara katılan bireylere finansal teşvikler sunmak, katılımcı teminini kolaylaştıran yaygın bir uygulamadır. Ancak, nitel araştırmalarda teşvik kullanımının disiplinler arası durumu tam olarak bilinmemektedir. Bu yöntemsel derlemenin amacı, Amerika Birleşik Devletleri bağlamında disiplinler arası nitel araştırmalarda finansal teşvik kullanımının durumunu incelemektir. Tanımlayıcı istatistikler ve negatif binom regresyon kullanılarak, 627 özgün tam metin ampirik nitel araştırma makalesinde yer alan 698 teşvik vakası incelenmiş ve nitel araştırmalarda kullanılan teşvik miktarlarını etkileyen faktörler belirlenmiştir. Bulgular, yayın yılı, araştırma alanı ve örneklem büyüklüğünün, nitel çalışmalarda sunulan teşvik miktarlarını etkileyen faktörler olarak işlev gördüğünü göstermektedir. Sistematik arama ile belirlenen 698 vaka kapsamında, teşvik miktarları (ABD doları) en az 5,00$ ile en fazla 500,00$ arasında değişmiş olup, ortalama 31,7$ (SS=32,1) bulunmuştur. Enflasyon oranına göre ayarlanan teşvik miktarları ise 5,00$ ile 565,00$ arasında değişmiş olup, ortalama 36,6$ (SS=37,4) olarak hesaplanmıştır. Çalışmamız, nitel araştırmalarda teşviklerin disipliner ve yöntemsel bağlamlar tarafından şekillendiğini ve araştırmacıların karar alma süreçlerine rehberlik edecek pratik çıkarımlar sunduğunu göstermektedir. Bu çalışma, nitel araştırmalarda teşvik kullanımına ve raporlama uygulamalarına ilişkin daha derin bir tartışma başlatarak araştırmacıların kendi alanlarında teşvikleri daha etkili biçimde kullanmalarına katkı sağlamayı amaçlamaktadır.

Anahtar Kelimeler: Finansal Teşvikler, Nitel Araştırma, Eğilimler

Introduction

Scholars use incentives in research to encourage participation, capture hard-to-reach populations, reach a representative sample of the overall population, and fairly compensate participants in return for their time, expertise, opinions, or feedback (Halpern et al., 2021). Incentivizing participants in quantitative research has received growing attention in the past few years (e.g., Abdelazeem et al., 2022; Adua & Sharp, 2010; Cantor et al., 2008; Neal et al., 2020; Singer & Ye, 2013), including studies about participants' perceptions of the use of incentives in research (e.g., Hoeyer et al., 2013; Kelly et al., 2017; Shay et al., 2021), ethical issues in providing financial incentives (e.g., Resnik, 2015; Seymour, 2012), and the role of incentives in motivating participants to participate in research (e.g., Clark, 2010; Islam & Tanasiuk, 2013). In contrast, despite the availability of an extensive number of qualitative research books and resources for researchers (e.g., Bourgeault, 2010; Cassell et al., 2018; Denzin & Lincoln, 2011; Flick, 2022; Leavy, 2014; Willig & Stainton Rogers, 2008) and some concerns about the lack of evidence-based guidance on incentivizing participants in qualitative research (Head, 2009), the topic of the use of financial incentives in qualitative research (itracks, n.d., Research Marketing Strategies Inc., 2011; Roller, n.d.) has received limited attention, with a few exceptions (Ferguson et al., 2021; Kelly et al., 2017; Surmiak, 2020).

Offering financial incentives to individuals for their participation in qualitative research is a common practice that improves recruitment (Creswell & Poth, 2018; Hammersley & Traianou, 2016; Kelly et al., 2017; Miller, 2012). However, the use of incentives of this type may raise ethical concerns such as biased enrollment, exploitation, and undue inducement, and additional risk of harm (Ryen, 2012; Surniak, 2020). To minimize those concerns, Institutional Review Boards (IRBs) play the role of protecting study participants and are responsible for reviewing study protocols and approving incentive amounts following national and international guidelines related to participant payment (Ripley, 2006; Speiglman & Spear, 2009). Still, there is "limited empirical knowledge to assist with this determination [of financial incentives] and little consensus on which elements of a study should be considered in making these decisions" (Ripley, 2006, p. 9). Rather than focusing on how incentive amounts are determined by the IRBs, it is important to examine existing practices in the use of financial incentives in qualitative research. Accordingly, this article reports the findings of a methodological review that aimed to examine the state of financial incentive use in qualitative research across fields in the context of the US. The following research question was addressed: To what extent do publication year, fields, method, sample size, and length of data collection predict the amounts of incentives used in qualitative research studies?

This review contributes to the qualitative research literature in two ways. First, this new knowledge can inform future research by offering evidence-based information on the use of financial incentives and help qualitative researchers determine the incentive amounts for their qualitative studies. Second, a study of this type may help address how various factors (e.g., types of qualitative methods used in the studies, sample sizes, etc.) inform existing incentive practices. Generating a detailed account of how financial incentives are used and trends in their use over time might allow researchers to determine, for each field, the amount of incentives granted, how incentives are awarded, and how

incentives vary by different qualitative methods used and over time, among other elements. Furthermore, this study may offer the foundation for igniting a conversation about trends in the use of financial incentives and help understand how it evolves over time with further research.

Theoretical Framework

This study is guided by the socio-ecological framework, a theoretical framework that delineates the dynamic interrelations among various individual and environmental factors in social contexts encompassing both disciplinary and societal contexts over time (Bronfenbrenner, 1979, 2005; Plano Clark & Ivankova, 2016). This framework guides our research in two ways. First, it underscores the contextually embedded nature of all research. Specifically, disciplines shape researchers' methods, compelling them to adapt their methods in response to the changing needs of their research communities and projects. In the context of this study, we examine researchers' use of incentives in qualitative research by discipline and over time to better understand the intricate nuances of incentive amounts and how these may be influenced by researchers' institutional structures, disciplinary norms, and societal priorities related to understanding certain topics over others. Second, this framework explains interpersonal contexts and how the person's complex interactions with their environment form their knowledge, belief, and experiences. In this study, interpersonal context is explained by the role of financial incentives and their role in participants' involvement in qualitative research.

This framework is particularly useful for examining the use of incentives in qualitative research because decisions about whether, when, and how to offer incentives are not solely made by individual researchers. They are shaped by interpersonal dynamics between researchers and participants (e.g., considerations of reciprocity or trust), institutional policies (e.g., IRB requirements, university payment systems), disciplinary and professional norms (e.g., varying acceptance of incentives across fields), and broader societal and structural forces (e.g., funding landscapes, ethical debates, and historical legacies of exploitation in research). Applying the socio-ecological framework therefore provides a structured lens to interpret trends in the use of incentives across disciplines, highlighting how methodological practices are embedded within broader contexts rather than isolated researcher choices. Using this socio-ecological perspective, we examine trends across fields and methods used in qualitative research. Overall, the framework helped us to compare how and to what extent incentives varied over time across fields as well as by the type of qualitative method, length of data collection, and sample size.

Method

To examine the state of financial incentive use in qualitative research across fields in the US, we undertook a methodological review of empirical qualitative research studies. In accordance with our research questions, methodological reviews "provide an opportunity to understand current practices and help to identify the need for guidance" (Mbuagbaw et al., 2020, p.3).

Search Strategy

With the assistance of an information scientist working at the University of Cincinnati, we searched the ProQuest Research Library Database to identify qualitative research publications that

self-identify as qualitative research in which researchers used financial incentives to recruit participants. The ProQuest Research Library Database was selected for sample identification due to its search capabilities within full-text articles, given that information about incentives is not likely included in any abstracts or study titles. The database also provides one-stop access to full-text articles from over 150 subjects and topics across disciplines (ProQuest Research Library, n.d.).

For the full-text identification and selection process, we followed the Preferred Reporting Items for Systematic reviews and Meta-Analyses (PRISMA) items applicable to methodological reviews (Page et al., 2021). The search for full-text articles was conducted on January 28, 2022 and limited to peer-reviewed articles and English language with no time limit, starting with the inception of the database in 1971. The search was also limited to the studies conducted only in the US because incentivizing study participants is a context-dependent phenomenon and the US is a research-intensive country that ranks seventh, as measured by gross domestic product (GDP) per capita (Organization for Economic Co-operation and Development [OECD], 2024). To identify qualitative studies conducted in the US that used incentives, the search in the database focused on three domains using "AND" in between: First, we used the key term "incentive" within the full text with asterisks (*) to identify truncations. Second, we conducted the search within main subject, title, and abstract using the key terms "qualitative," "focus group," and "interview" with an "OR." Third, we searched for the "United States" as the location (see Appendix 1 for the details of search string).

Inclusion and Exclusion Criteria

Different inclusion and exclusion criteria were applied during the screening and eligibility phases. Articles were included in the screening phase if they were in English and empirical studies. In addition, the articles were also included in the screening phase if they adhered to a methods-based definition of qualitative research (Creswell & Poth, 2018), meaning that they employed qualitative data collection and analysis strategies. In the eligibility phase, included publications were empirical qualitative peer-reviewed articles that: (a) were conducted in the US, (b) included full-text, (c) were in English, and (d) used financial incentives for the study participants. In this phase, our exclusion criteria were: (a) empirical qualitative studies that employed secondary analysis, (b) not empirical publications (e.g., theoretical or methodological articles, review articles, editorials, letters to editors, study protocols, program or intervention descriptions, commentaries, conference abstracts, and book/media reviews), (c) empirical qualitative studies that were dissertations, books, book chapters, and reports, (d) empirical studies that employed both qualitative and quantitative components or mixed methods, and (e) studies that used non-financial incentives, (f) studies that used financial incentives but raffled, (g) studies that used incentives but did not report exact amount, (h) studies that incentivized the setting not the participants, (i) qualitative empirical studies that incentivized their participants but did not provide any information about their sample size and/or method, and (j) studies that used quantitative interview techniques (e.g., phone interviews with closed-ended questions).

Selection Process

During the screening, four team members (STT, MT, SD, and FO) randomly selected and independently reviewed four sets of 100 abstracts (a total of 400 abstracts). Second, they compared their reviews of the studies and refined the inclusion criteria to enhance agreement. Third, after refining the inclusion criteria, they randomly divided the remaining 4,030 records into two sets that each reviewed and screened by two authors (two authors for each set). To ensure continued agreement during the abstract screening process, one team member (STT) reviewed and compared 4,030 records for inter-coder agreement purposes. The comparing process included four sessions where all team members met, each lasting approximately 2 hours. During these sessions, each author shared their abstract screening process followed by discussions to ensure consistency between the reviews. The initial inter-coder agreement for the abstract screening process was 88%. All disagreements were discussed and resolved, and the team reached consensus. In the eligibility phase, first, two team members (STT and SD) screened 2,016 full-text articles for whether they reported using financial incentives to recruit participants and they met the inclusion criteria. Then, the two team members checked each other's review for the eligibility phase. Following this step, the same two team members met twice, each meeting lasting 1 hour, to discuss disagreements. The initial inter-coder agreement for the full-text screening process was 99%. All disagreements were discussed and resolved, and the two team members reached consensus.

Data Extraction and Coding

Each incentive information provided in an empirical qualitative research study was considered as the unit of analysis for this review study. For example, in a qualitative study, if two different populations were incentivized with different amounts, then, each incentive amount was recorded for each population or method of data collection. For data extraction, one team member (STT) created a database using MAXQDA 2022 qualitative and mixed methods data analysis software (VERBI Software, 2021) and imported the eligible articles into the database. Two team members (STT and SD) extracted information about field, total number of participants, incentive amount, methods (i.e., data collection strategies), and length of data collection, which were the variables of interest. Another two team members (MT and FO) checked the data extraction process for clarity and transparency. Two team members (STT and SF) independently coded the academic field of each publication using the National Center for Science and Engineering Statistics (NCSES) Taxonomy of Disciplines to categorize academic fields. Disagreements between the two reviewers were resolved by consensus.

Data Analysis

Once we completed the data extraction using MAXQDA software, we extracted the relevant information into Microsoft Excel spreadsheets and created a Masterfile that included all variables of interest for the eligible articles with incentive cases. Then, we imported the Microsoft Excel Masterfile to Wizard for Mac program, which was used for different quantitative analyses. To describe the study sample and identify trends in the use of incentives in qualitative research, we employed descriptive statistical techniques and prevalence, mean, median, Inter Quartile Range (IQR), standard deviations,

minimum and maximum values, and an inferential test of associations by considering the annual inflation over time from 1995 to 2021. Next, the proportion with 95% CI was calculated to assess the statistical significance of the difference in incentive amounts.

Due to the over dispersed nature of the count data at hand (i.e., the conditional variance being larger than the conditional mean), negative binomial regression as one form of Poisson regression was employed to identify the significant predictors of incentive amounts in qualitative research (Coxe et al., 2009; Gardner et al., 1995; Payne et al., 2018). A negative binomial regression model was chosen because the regression results would be biased by several problems including standard errors that would be too small, test statistics of the parameter estimates that would be too large, overestimated significance of the parameter estimates and very small confidence limits if the issue of overdispersion were not taken into account in the analysis of count data (Coxe et al., 2009). Since more than one count of incentive from some individual studies was included in the data and the sets of incentives used in the same studies were unlikely to be independent of one another, the situations known as state dependence being one of the two common reasons for overdispersion in the count data as well as unexplained heterogeneity in the count outcome that was very likely to have resulted from individual differences among the uses of incentives across various qualitative studies were suspected; therefore, standard Poisson regression was not considered appropriate for the data (Coxe et al., 2009). Accordingly, as an alternative to standard Poisson regression assuming equidispersion, negative binomial regression was used as a common method for taking overdispersion into account (Coxe et al., 2009; Hilbe, 2007; Land et al., 1996). The use of incentives was operationalized as the incentive amounts in US dollars paid to participants in qualitative studies, which was used as a count outcome variable and publication year, field, method, sample size and length of data collection were used as predictors of the incentive amounts in the negative binomial regression model to determine the influencing factors for the amounts of incentives used in qualitative research studies. We used .05 as the conventional threshold for statistical significance of the regression parameters (Tabachnick & Fidell, 2013).

Findings

In presenting the results of our review, we use the socio-ecological framework as a guide to organize and interpret trends in the use of incentives. This framework enables us to highlight how practices are shaped by individual researcher decisions, disciplinary and methodological conventions, institutional structures, and broader societal and ethical contexts. While our quantitative mapping of trends emphasizes disciplinary and methodological variation, situating these patterns within the socio-ecological model allows us to consider how structural and contextual factors intersect with researcher practices.

We identified 4,476 publications between 1971 and 2022. As seen in Figure 1, we excluded 46 duplicate records and analyzed the abstracts of 4,430 publications. Based on the screening of abstracts and titles, we excluded 2,414 publications that did not meet our definition of qualitative research, meaning that they employed qualitative data collection and analysis strategies, and assessed 2,016

publications for eligibility. After reading the full text of these publications, we excluded 1,387 publications that did not meet our inclusion criteria and two that failed to report on more than two of the examined categories. We identified a final sample of 627 unique qualitative empirical publications that met our definition of qualitative research and utilized financial incentives for our review and analysis. Since the incentive was the unit of analysis for the review, and a single publication could have included more than one type of incentive, the number of cases of incentives did not match the final number of included publications. Accordingly, we examined 698 cases of incentives for 627 unique full-text empirical qualitative research articles.

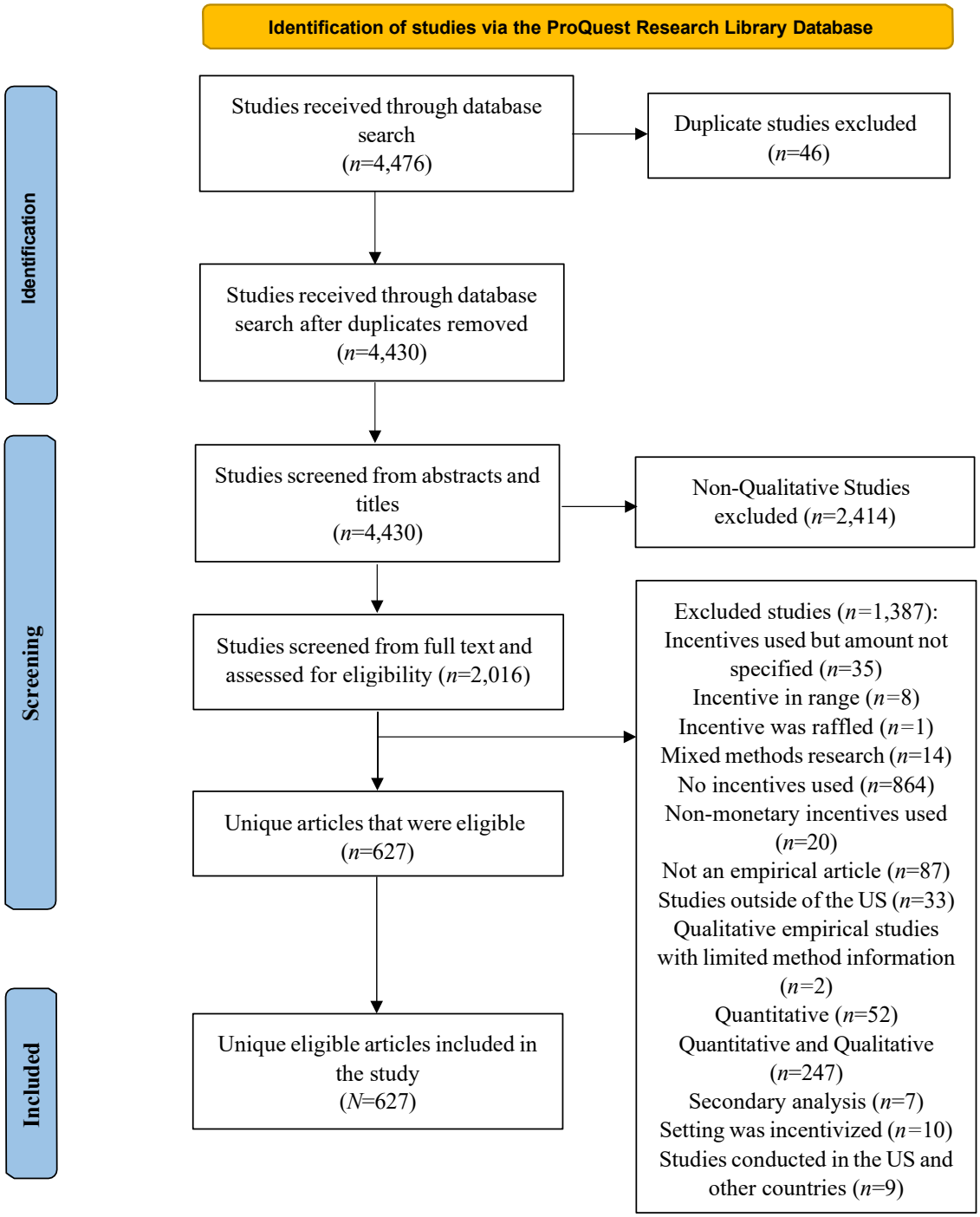


Figure 1
Flow Diagram of Study Identification and Selection

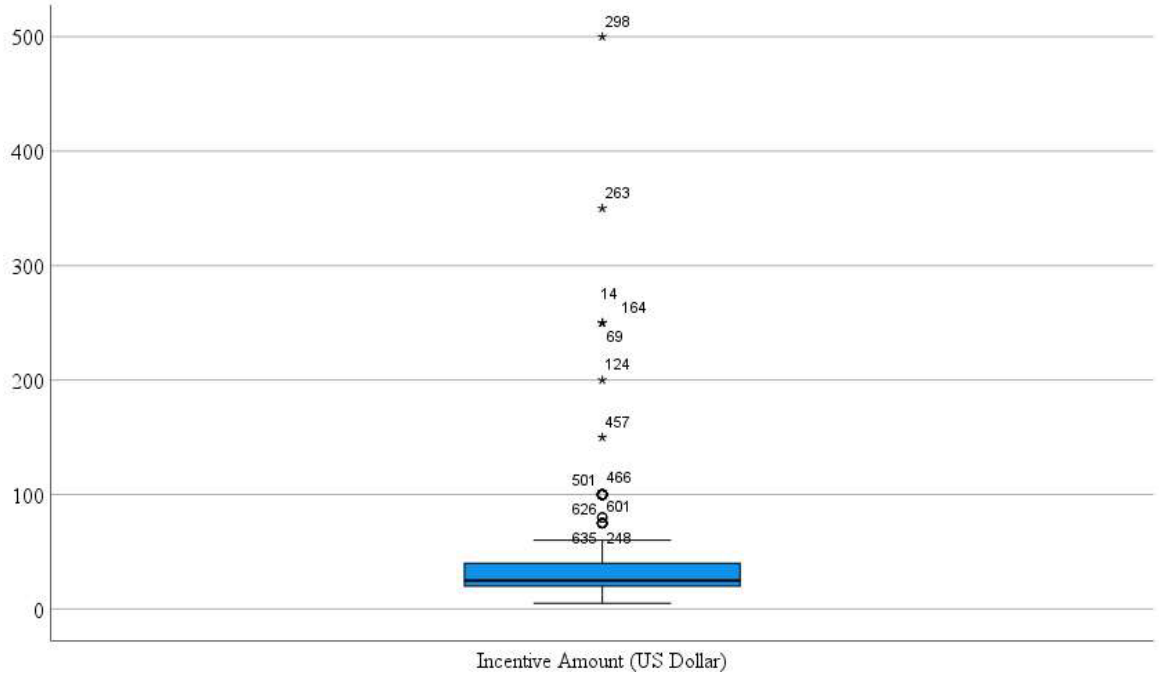
Patterns in the Amounts of Incentives Used in Qualitative Research Studies

To answer the research question - to what extent do publication year, field, method, sample size, and length of data collection predict the amounts of incentives used in qualitative research studies? - the descriptive analysis showed the variation in the incentive amounts and led to the identification of different characteristics of the studies that used incentives. Of the 698 cases identified through the systematic search, incentive amounts (US Dollar) varied from minimum $5.00 to maximum $500.00 with mean of $31.7 (SD=32.1). The incentive amounts (US Dollar) with the inflation rate varied from

$5.00 to maximum $565.00 with mean of $36.6 (SD=37.4). Figure 2 depicts the variation in the incentive amounts used in the 698 cases within 627 publications included in the review.

Figure 2

Variation in the incentive amounts used in qualitative research studies



As presented in Table 1, of the 698 cases of incentives use, more than one half of them (50.3%) were published between 2016 and 2021, followed by 2011-2015 (29.2%), 2006-2010 (11.3%), 2001-2005 (6.6%), and 2000 or earlier (2.6%), respectively. Based on our categorization of the field, more than one half of the cases of incentive use in qualitative research were from health sciences (64.0%), followed by social sciences (21.2%), psychology (12.3%), and others (e.g., biological, agricultural, and environmental life sciences, computer and information sciences) (2.4%). In terms of methods, interview (64.9%) was found to be the most common data collection technique, followed by focus groups (34.2%), and others (i.e., Photovoice, journaling) (0.9%). Despite the variations across publication year, field, and method categories, sample size was found to be almost equally distributed (approximately one fourth) within the sample of 698 cases of incentive use. When we examined length of data collection within the study sample, we found that almost one third (33.1%) of the cases lasted 60 minutes or less, followed by 61-90 minutes (24.8%). One-fifth (20.6%) of those 698 cases of incentive use did not report the length of data collection. Of 698 cases of incentive use, 16.5% of them lasted between 91 and 120 minutes, whereas 5.0% of them lasted more than 120 minutes.

Table 1

Descriptive Characteristics of Factors in Incentive Amounts (in US Dollars) for the Sample of 698 Cases of Incentive Use

Factors	Count (*n*)	Percentage (%)
Publication Year		
2000 or earlier	18	2.6
2001-2005	46	6.6
2006-2010	79	11.3
2011-2015	204	29.2
2016-2021	351	50.3
Field		
Health	447	64.0
Social Sciences	148	21.2
Psychology	86	12.3
Other	17	2.4
Method		
Interview	453	64.9
Focus Group	239	34.2
Other	6	0.9
Sample Size		
1-17	179	25.6
18-29	177	25.4
30-44	169	24.2
45 or more	173	24.8
Length of Data Collection		
60 mins or less	231	33.1
61-90 mins	173	24.8
91-120 mins	115	16.5
>120 mins	35	5.0
Not stated	144	20.6

The different levels of independent variables (influencing factors) presented in Table 1 were used as the hypothesized predictors of the count of incentive amounts used in qualitative studies modeled in a negative binominal regression model. We found that the likelihood ratio chi-square test was statistically significant, $\chi 2$ (680, N = 698) = 59.745, $p < .001$, indicating that the negative binomial regression model containing the full set of predictors fit significantly better than a null (intercept-only) model. As the model was statistically significant, we proceeded to the evaluation of each of the regression coefficients of the predictors in the model in order to identify those predictors that contributed significantly to the model (Osborne, 2017). Table 2 presents the results of a negative binomial regression model with publication year, field, method, sample size, and length of data collection used as the predictors of the count of incentive amounts entered in the model as US Dollars, used as the dependent variable, and the outcome of interest in this study by taking the inflation rate into account as well.

Table 2

Parameter estimates for negative binomial regression (n=698).

	Coefficient	**Standard error**	**IRR (95% CI for IRR)**	**z-score**	**p-value**
Intercept	3.622	0.156	37.422 (27.556–50.819)	23.199	**< 0.001**
Publication Year					
2000 or earlier (ref)	-	-	-	-	-
2001-2005	0.450	0.175	1.569 (1.114– 2.579)	2.579	**0.010**
2006-2010	0.123	0.163	1.131 (0.822–1.556)	0.756	0.450
2011-2015	0.044	0.153	1.045 (0.774–1.410)	0.287	0.774
2016-2021	0.086	0.151	1.090 (0.810–1.466)	0.568	0.570
Field					
Health (ref)	-	-	-	-	-
Social Sciences	-0.228	0.059	0.796 (0.709–0.894)	-3.839	**< 0.001**
Psychology	-0.018	0.075	0.983 (0.847–1.139)	-0.233	0.815
Other	0.179	0.152	1.196 (0.887–1.611)	1.175	0.240
Method					
Interview (ref)	-	-	-	-	-
Focus Group	0.048	0.055	1.050 (0.942–1.170)	0.874	0.382
Other	0.179	0.257	1.197 (0.724–1.979)	0.700	0.484
Sample size					
1-17 (ref)	-	-	-	-	-
18-29	-0.180	0.067	0.835 (0.732–0.952)	-2.697	**0.007**
30-44	-0.142	0.069	0.868 (0.758–0.994)	-2.054	**0.040**
45 and more	-0.126	0.069	0.881 (0.770–1.010)	-1.823	0.068
Length of Data Collection					
60 mins or less (ref)	-	-	-	-	-
61-90 mins	-0.004	0.067	0.996 (0.873–1.336)	-0.065	0.948
91-120 mins	0.026	0.077	1.026 (0.882–1.195)	0.335	0.738
>120 mins	0.223	0.117	1.250 (0.995–1.572)	1.915	0.055
Not stated	-0.060	0.070	0.942 (0.820–1.081)	-0.955	0.392
Model summary					
Sample size			698		
Log-Likelihood			-3058.803		
X^2 test			**59.745**		
Degrees of freedom			**680**		
P-value			**< 0.001**		
Akaike Information Criterion			6153.605		

In terms of publication year, 2000 and earlier was used as the reference category, and we found that 2001-2005 was a positive and significant predictor of the incidence rate for the amount of incentives (b=.450, s.e.= .175, *p*= .010). The incidence rate ratio (IRR) which basically represents the change in the count outcome variable in terms of a percentage increase or decrease in the count variable suggested that the amount of incentives for the qualitative research published in the 2001-2005 period was statistically significantly higher by approximately 56.9% (IRR=1.569, 95% CI: 1.114, 2.579) than in the 2000 or earlier studies, while holding all the other variables in the model constant. However, 2006-2010, 2011-2015, and 2016-2021 were all positive but nonsignificant predictors of the incidence rate for the amount of incentives (b=.123, s.e.= .163, *p*=.450; b=.044, s.e.= .153, *p*=.774; b=.086, s.e.= .151, *p*=.570, respectively). The IRRs for these predictors suggested that the amounts of incentives for the qualitative research published in 2006-2010, 2011-2015, and 2016-2021 periods were higher by approximately

13.1%, 4.5%, and 9.0% respectively, though statistically not significant, than in the 2000 or earlier qualitative studies (see Table 2).

In terms of field, health was used as the reference category and we only found social sciences as a negative and significant predictor of the incidence rate for the incentive amounts used (b=-.228, s.e.=.059, $p< 0.001$) while the other two field predictors (i.e., psychology and other) were statistically nonsignificant in the model. The IRR for social sciences suggested that qualitative research studies conducted in the field of social sciences used 20.4% less amounts of incentives (IRR =0.796, 95% CI: 0.709–0.894) than those conducted in health sciences, while holding all the other variables in the model constant.

In terms of sample size of qualitative research studies using incentives, a sample size of 1-17 was used as the reference category, and we found the sample size of 18-29 as a negative and significant predictor (b= -.180, s. e.= .067, p=.007) in the model. The IRR for this sample size indicated that the qualitative studies having a sample size of 18-29 used 16.5% less amount of incentives (IRR= 0.835, 95% CI: 0.733, 0.952) than those with sample size 1-17, while holding all the other variables in the model constant. We also found the sample size of 30-44 as a negative and significant predictor of the incidence rate for the amount of incentives (b=-.142, s.e.= .069, p=.040). The IRR for this sample size as a predictor suggested that those studies with a sample size of 30-44 used 13.2% less amounts of incentives (IRR=0.868, 95% CI: 0.758, 0.994) than those with sample size 1-17, while holding all the other variables in the model constant. However, the sample size of 45 and more was not found to be a significant predictor in the model (p=.068). In terms of length of data collection and method, we found no significant association between a specific length of data collection (60 mins or less, 61-90 mins, 91-120 mins, or more than 120 mins) and type of data collection method such as interview, focus groups or others.

Discussion

The purpose of this study was to gain a better understanding of the use of incentives in qualitative studies by examining the extent to which certain hypothesized factors would influence the amount of incentives used in the identified qualitative studies included in our review. Our study has empirically shown that publication year, field of research, and sample size could function as influencing factors in the amount of incentives offered in qualitative studies. The results of this study provide evidence that the number of qualitative studies was way less for the period of 2000 or earlier compared to the 2001-2021 period. This result is consistent with the previous literature stating that the use of incentives in qualitative research was rarely considered (Thompson, 1996), and there is no empirical study to show the change since the mid-90s (Head, 2009). Our study addressed this gap by explaining the patterns in the use of incentives in qualitative research studies between 1995 and 2022 in the context of the US.

In addition to the prevalence in the use of incentives, the results of this study showed that higher amounts of incentives given in US dollars were used during the 2001-2021 period compared to the qualitative studies published in 2000 or earlier. This finding may have different potential explanations. First, qualitative researchers might have embraced the use of financial incentives much more frequently since 2001 due to different funding mechanisms that encouraged researchers to use qualitative and mixed methods research approaches (National Science Foundation, 2002; Plano Clark, 2010). Second, although incentives were used in qualitative studies in 2000 or earlier, researchers might not have reported the details of the use of incentives due to the limited guidelines in reporting qualitative research at the time. Research shows that there is a growing literature on guidelines for reporting qualitative research (e.g., American Psychological Association, 2018; O'Brien et al., 2014; Tong et al., 2007; Tong et al., 2012). Another potential reason for the growth in reporting of the use of incentives might be that providing financial incentives is perceived as being the most effective strategy to encourage participation in research and maximize participant retention regardless of the study population within the social and health sciences (Coday et al., 2005; Parkinson et al., 2019). Empirically evidenced in the study by Kelly et al. (2017), using incentives in qualitative research matters in achieving participation. Their study moves this discussion beyond achieving participation and shows that varied amount of financial incentive produces more or less willingness in participating in qualitative research.

Consistent with the socio-ecological framework used in our study, we observed disciplinary differences in the use of incentives. Particularly, qualitative studies in the field of social sciences used smaller amounts of US dollars incentives than the health sciences qualitative studies. This result may be explained by the fact that using financial incentives as a general tool for recruitment in health sciences has more historical context and track record (Largent et al., 2022), whereas the use of financial incentives in social sciences "may have a longer, though largely uncharted, history than might at first be assumed" (Head, 2009, p. 336). Although the idea of using higher amounts of incentives in health sciences compared to studies in social sciences may sound intuitive or commonsense due to the availability and limitations of different financial resources to the researchers from both fields, our results represent the first direct empirical demonstration of this difference, which is noteworthy for qualitative researchers in both fields.

We also found that sample size was a significant factor influencing the number of US dollars offered as incentives to participants in qualitative studies. More specifically, those qualitative studies having a sample size of 18-29 and 30-44 participants were found to offer fewer incentives per participant in the count of US dollars compared to those offered in qualitative studies with a sample size of 1-17. This pattern of results indicating a negative relationship between the sample size and the count of incentive amounts in US dollars may be explained with the guidance about ideal participant numbers stated in the qualitative research literature for small-scale qualitative research versus a larger group of participants like focus groups (Creswell & Poth, 2018; Jessiman, 2013). In our view, the most compelling explanation for this set of findings regarding the negative association between the sample

size and the amounts of incentives in qualitative studies is that the researchers with limited budgets might tend to offer lesser amounts of incentives per participant as the total number of participants increases in research. The negative association we found between the sample size of 45 and more and the amount of incentives also supports the current pattern of these findings, although this association did not reach statistical significance in the study sample.

Finally, although the previous literature explains that participants' perspectives on financial incentives for research participation are informed by the time commitment (Largent et al., 2022), we did not find any significance in the length of data collection. Similarly, the type of qualitative methods did not present any significance. Taken all together, our findings indicate that the amount of incentives offered in qualitative studies could be explained by the year when studies were published, the field in which they were conducted, and the number of participants recruited. Collectively, these results warrant our argument and the use of the socio-ecological framework for this study, given that various individual (i.e., researchers' allocation of the financial incentives by sample size) and environmental factors in social contexts, including disciplinary contexts (i.e., health sciences incentivizing participants higher than social sciences) explain the use of incentives in different contexts. The findings of this study indicate such an underlying pattern of relationships between these influencing factors and the amount of incentives offered in qualitative studies, as has been empirically demonstrated in this study, which has several implications.

Implications

This study has several implications for qualitative research across fields. First, using financial incentives in qualitative research is explained by multiple factors, and this study is the first one to provide such empirical evidence despite the earlier call made by ethicists and researchers about offering further empirical guidance regarding incentives (Ripley, 2006). Second, while the use of financial incentives in qualitative research is important to encourage participation and retention (e.g., Coday et al., 2005; Parkinson et al., 2019), it rarely receives attention, and limited information about the use of incentives is provided in qualitative studies. For example, we initially aimed to also consider additional variables such as qualitative research design, demographic characteristics of the study sample, and study population, but these variables were limited in reporting in the qualitative studies included in our review. Therefore, we encourage researchers interested in conducting qualitative research to pay attention to and explain those methodological and ethical details in their studies when reporting. Based on the results of this study, more research on the use of financial incentives in qualitative research is needed. Future research should focus on whether any disparities exist in the use of incentives across the fields based on population type and some characteristics such as race and ethnicity.

Our review also highlights several practical implications for qualitative researchers considering the use of incentives. First, researchers can use these findings to situate their own practices within disciplinary norms, strengthening the justification of their incentive strategies in IRB applications and

funding proposals. Second, our synthesis illustrates financial incentives and contexts in which they are most often used, providing a basis for aligning incentive choices with participant needs and research goals. Third, our review underscores the importance of considering equity and ethics when determining incentive amounts—what may be customary in one discipline or population may raise concerns about coercion or undue influence in another. Together, these insights can inform more transparent, consistent, and ethically grounded decisions about incentives in qualitative research.

Limitations

The results of this study should be interpreted with the consideration of six limitations. First, we purposefully selected a database for sample identification that allowed us to complete our search within full-text articles, given that information about the use of incentives is not likely included in any abstracts or study titles. Because of this database selection, our study sample likely does not generalize to all health sciences, social sciences, and other fields; therefore, the results should be interpreted with caution. Second, our search strategy included the two major qualitative data collection methods (i.e., interview, focus groups) in the database search because these two methods are the most common strategies used in qualitative research (Creswell & Poth, 2018; Howitt, 2016). Despite the limitation in our search, the hits received from the database included other methods such as Photovoice and journaling and call for future research with inclusion of broader sets of qualitative methods.

Third, our data extraction process included factors not reported in this paper, including study population, characteristics of the study sample, qualitative research design, and time of data collection. However, some of these factors were not clearly reported in the qualitative studies that used incentives and therefore we had to make a choice between keeping the overall sample and not including these additional variables in the data analysis. Accordingly, we excluded these factors from our analysis. Conducting negative binomial regression with these additional variables and other potentially confounding factors might be informative about the use of incentives in qualitative research. In addition, considering these additional factors in future research might be important to examine the disparities in the use of incentives, if any, by study population and characteristics of the study sample. Fourth, our study had a limitation concerning the coding of the fields as the small samples sizes for multiple fields did not allow us to conduct negative binomial regression; therefore, we used the National Center for Science and Engineering Statistics (NCSES) Taxonomy of Disciplines, and our study findings ought to be interpreted within this field's classification context. Fifth, we used quantitative approaches in examining the use of incentives in qualitative research in line with the purpose of this study. However, future research may consider applying a combination of qualitative and quantitative methodologies to further explain the patterns identified in the use of financial incentives in qualitative research and explore the contextual meaning of the patterns. Sixth, to limit the scope of our study to a manageable number of papers for detailed examination, we limited our geographic focus to the US. According to the National Science Foundation (Trapani, n.d.), the US has the highest total research and development (R&D)

expenditures in the world, although it ranks 23rd when calculated as a percentage of GDP. Therefore, we did not examine the incentive practices of other developing countries that spend much less on R&D.

Conclusion

This study contributes to the field of qualitative research by explaining the trends in the use of financial incentives and offering evidence-based information and nuanced insights about the factors that play key roles in the amounts of financial incentives. This methodological review underscores that incentives in qualitative research are shaped by multilevel influences. Our findings suggest four key implications. First, researchers should situate their use of incentives within disciplinary traditions, while being attentive to evolving ethical debates. Second, transparency in reporting incentive type and amount is essential to enable cumulative knowledge building across studies. Third, researchers should anticipate institutional and structural constraints (e.g., IRB requirements, financial systems) when planning studies. Finally, incentives should be considered not only as logistical tools but also as elements that shape relationships, equity, and participation in qualitative research. Together, these implications support more consistent, ethical, and context-sensitive practices for the use of incentives. We hope that this work ignites a deeper dialogue about the use of incentives in qualitative research and reporting practices to assist researchers in enhancing the effectiveness of using incentives within their respective disciplines while also meeting discipline expectations.

Contribution Statement/ Araştırmacıların Katkı Oranı

Conceptualization: STT, MT, and SF; Methodology: STT, MT, and SF; Data collection and curation: STT, MT, SD, and FD; Formal analysis: JM and MT; Writing – Original draft: STT, MT, and SF; Writing – Review & editing: STT, MT, SF, SD, FO, and BUE. / Kavramsallaştırma: STT, MT ve SF; Yöntem: STT, MT ve SF; Veri toplama ve organize etme: STT, MT, SD ve FD; Analiz: JM ve MT; Yazma – Orijinal taslak: STT, MT ve SF; Yazma – İnceleme ve düzenleme: STT, MT, SF, SD, FO ve BUE.

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Declaration of Competing Interest / Çatışma Beyanı

There is no conflict of interest. / Çıkar çatışması bulunmamaktadır.

Ethics Committee Approval / Etik Onay

Ethics committee approval was not obtained for this study due to the nature of the systematic review. / Sistematik inceleme çalışmasının doğası gereği etik kurul onayı alınmamıştır.

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