The Big Bang:
The Rapidly Expanding World of Online Qualitative Research

Isaac Rogers, Director of Product Innovation, 20|20 Research
Judy Langer, President, Langer Qualitative
A Brief History of Online Qualitative
A Brief History of Online Qual

~1998: First uses of online qualitative

2001: Significant rise in online post 9-11

2005: Second generation of tools begin to enter marketplace

~2008: Rapid growth of online methods
A Brief History of Online Qual

- Rockhopper Research Industry Trends study of research providers and clients 2008
  - Online primary method
    - Quantitative – 60%
    - Qualitative – 15%
  - Ever use online
    - Quantitative – 90%
    - Qualitative – 30%
  - 20-30% increase year-over-year for some methodologies
- Some companies’ qual now mainly online
Growth of Research Methodologies
Online methodologies and ethnographic research are the fastest growing over the last year. In contrast, in-person focus groups, qualitative intercepts, and dial tests are the slowest growing and actually have seen less growth over the last year than other methodologies.

<table>
<thead>
<tr>
<th>Methodology</th>
<th>More</th>
<th>Same</th>
<th>Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online bulletin boards/Forums (n=170)</td>
<td>66%</td>
<td>26%</td>
<td>8%</td>
</tr>
<tr>
<td>High growth methodologies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online surveys (n=510)</td>
<td>64%</td>
<td>30%</td>
<td>6%</td>
</tr>
<tr>
<td>Online social networking/Blogs (n=68)</td>
<td>62%</td>
<td>28%</td>
<td>16%</td>
</tr>
<tr>
<td>Ethnographic/observational research (n=275)</td>
<td>57%</td>
<td>31%</td>
<td>11%</td>
</tr>
<tr>
<td>Online focus groups/chat (n=107)</td>
<td>55%</td>
<td>34%</td>
<td>8%</td>
</tr>
<tr>
<td>Usability sessions (in-person) (n=169)</td>
<td>42%</td>
<td>47%</td>
<td>9%</td>
</tr>
<tr>
<td>In-depth interviews (telephone) (n=397)</td>
<td>40%</td>
<td>46%</td>
<td>14%</td>
</tr>
<tr>
<td>In-depth Interviews (in-person) (n=483)</td>
<td>38%</td>
<td>47%</td>
<td>14%</td>
</tr>
<tr>
<td>Focus groups (telephone) (n=120)</td>
<td>32%</td>
<td>44%</td>
<td>16%</td>
</tr>
<tr>
<td>Intercept surveys (n=220)</td>
<td>31%</td>
<td>46%</td>
<td>20%</td>
</tr>
<tr>
<td>Focus groups (in-person) (n=639)</td>
<td>29%</td>
<td>47%</td>
<td>24%</td>
</tr>
<tr>
<td>Perception Analyzers/Dial tests (n=66)</td>
<td>29%</td>
<td>49%</td>
<td>22%</td>
</tr>
<tr>
<td>Intercepts (qualitative) (n=103)</td>
<td>26%</td>
<td>47%</td>
<td>20%</td>
</tr>
<tr>
<td>Telephone surveys (n=449)</td>
<td>22%</td>
<td>51%</td>
<td>25%</td>
</tr>
<tr>
<td>Mail surveys (n=214)</td>
<td>17%</td>
<td>56%</td>
<td>23%</td>
</tr>
<tr>
<td>Other (n=78)</td>
<td>47%</td>
<td>35%</td>
<td>9%</td>
</tr>
</tbody>
</table>

↑↓ indicates significantly higher/lower at the 95% confidence interval

Base: used the methodology in the last year. Caution base sizes: *n<50, **n<30, ***n<20 (too small to report results)

Q13. And would you say the percentage of each of the following types of qualitative marketing research methodologies your organization has engaged in is [a lot more, a little more, about the same, a little less, or a lot less than last year]?
Barriers to OQR Adoption

- “Is it really qualitative?”
- Are the people real?
- Only for techie respondents, moderators, clients?
- Negative early experiences
- Small/no price advantage vs. in-person
- Labor-intensive
The Confluence

The tools, methods, and social dynamics shaping market research
The Confluence

Methodology and best-practices

Demographics

Online Qualitative Adoption

Tools
We’re an online society now

- 75% of the US is online
- More comfort sharing, engaging online
- Internet adoption across socioeconomic, age groups
Knowledge, methods widely documented, actively shared

- Best practices library
- Suppliers offer demo projects for hands-on experience
- 50+ learning events regarding online approaches each month

Methodology and best practices
Wide variety of online tools today

- Innovative vendors have developed over a dozen categories of products
- Easy to learn, use without being a “techie”
- Most online software now in 2nd or 3rd generation
Abundance of approaches used separately or together

- Real-time Chats
- Bulletin Boards
- Webcam Focus Groups
- Video Journals
- Research Blogs
- Mobile Qualitative
- Research Communities
- Immersion IDI’s
- Web-intercepts/chats
- Social Network monitoring
Bulletin Boards
Bulletin Boards

- Typically 3-5 days, 10-30 participants per board
- Often used as a focus group replacement, but also used for mini-panels, communities, IDIs, video journals
- Participants/moderators/clients log in asynchronously
- Probing, masking and a variety of controls
- Deep, rich discussions
We're going to talk about something fun. Let's pretend you are at a party. And the party attenders are music, television, movies and books. I want you to treat all three of these things as if they are actual party attenders.

Now tell me about the party. What type of party is it? Are there a lot of other guests in attendance? Who is the coolest person at the party? What makes them the coolest? Who is the most fashionable? What makes them the most fashionable? Who is mingling and who is a wallflower?

Please be sure to use lots of details. Your goal is to make Dane and I feel like we were there.

(and remember you can't see what anyone else says until you answer the question)

I went to a party last week with a friend of mine and I didn't know anyone there. I'm not the most outgoing person, so I pretty much stayed in the background and watched everyone there. Over in the corner was a big screen TV that was showing a football game. Needless to say there were a bunch of men gathered around the TV so I went over to watch for a bit. The Titans were playing, they haven't been doing so well lately so the excitement level was pretty low so I moved on. Next I wandered into a room that was set up like a movie theater. There was a movie playing that I caught my attention because it was about vampires, love those kinds of movies. The people in that room were pretty much dressed in black and were drinking cosmos, so I grabbed one myself and stayed to watch for awhile. Pretty much blended in with them since I don't really own any clothes in any other color besides black (makes you look slimmer you know). Anyway, I realized that it was one that I had seen many times before so I went outside to get a little air. I found my friend out there by a big stage that was set up for a band that was about to go on and play. As we were talking the band took the stage and to my surprise it was Chevelle, who just happened to be my favorite at the moment!!! Lucky me, just when I was ready to pack it in and call it a night. As they were playing my favorite song, the singer caught my eye and saw me singing along and called me up on the stage to sing with him. Have to say it was one of the best things that ever happened to me in my life and I will be thanking my friend for bringing me for years to come.

Well, of course, there is music blaring, television broadcasting (large plasma screens all around the room,
My name is Jane Smith and I'm going to be your moderator for this discussion.

Over the next few days we're going to discuss your current cell phone plan, and I'm going to show you some new ad campaigns we're going to run to tell people about our offerings.

Let's start by you telling me a little about yourself!

---

**NEW!** John Smith  
March 21, 2010, 5:36 PM

My name is John and I live in Seattle, Washington. My wife and I have two kids, Tim and Shane. They're 11 and 14.

I work at a sports arena in Seattle, I'm the manager of operations. I like the job because it allows me to see all sorts of great shows and games!

I currently use one cell phone for work, and one for personal. It's kind of clunky, but it works! 😊

---

**NEW!** Melissa Strong  
March 21, 2010, 5:42 PM

John, I used to live in Seattle— I love it there!
Only natural pesticides used for fruits and vegetables, no growth hormone or antibiotics fed to animals.

Looking at the same image, please tell me who do you think buys this product and why?

Type your comment here.
Chart Responses (67 Responses)

- Soy: 0
- DHA Omega-3: 1
- Organic: 14
- Added vitamins: 1
- Low-fat: 11
- Price: 6
- Probiotics: 8
- Specific flavors: 14
- Packaging: 5
- Other: 7

March 26, 2010, 8:51 PM

Strong preference for organic. Low fat is also preferred. We like the way wallaby organic vanilla tastes. Our dairy free child likes the coconut yogurts by So Delicious. I don't think these are organic but it's our best dairy free and soy free option at Whole Foods.
Participant-generated content: Video Journals
Live Focus
Group Chats
Real-time chats

- Typically 60-90 minutes
- Text-typing discussion between participant/moderator
  - Client “backroom” chat with research team
- Good for some segments, purposes – e.g., teens, quick concept testing
- Less used now in U.S., still popular in Europe
Webcam Groups
Webcam groups

- “Virtual focus group”
  - 60-90 minutes
  - IDI or groups with up to 8 participants
  - Used for concept testing, at-home product use, ongoing research video panels

- Commercials and video content easily shared

- Participants/clients/moderators all across the globe
Logo A  

Too "boring"

Logo B  

My Favorite!

Logo C  

This looks too much like your main competitor!

Isaac Rogers: (8/25/2008 11:13) OK Everyone, let's take a look at the logo concepts to the right.
Isaac Rogers: (11:13) We want everyone to think about these logos in relation to the ACME brand.

Isaac Rogers: (11:13) Do any of these logos seem to "fit" the company?

Isaac Rogers: (11:14) Use the shared whiteboard to mark up the images if you've got suggestions on how they might be improved.
Mobile Qualitative

- Reach participants “at the moment”
  - Shopping
  - TV watching
  - Meals/snacking

- Collect data without taking them out of their normal lives
<table>
<thead>
<tr>
<th>Date &amp; Time</th>
<th>Sender</th>
<th>Phone</th>
<th>Reply Message</th>
<th>Original Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fri 24/04</td>
<td>Bethany</td>
<td>415-***</td>
<td>Cash one purchase was a small amt and I had the cash.</td>
<td>If you've made a purchase in the last few hours, please let us know how you paid for it (cash, check, credit card) and why you chose that payment method.</td>
</tr>
<tr>
<td>3:33 PM</td>
<td></td>
<td>*****</td>
<td>Second purchase store took cash only</td>
<td>If you've made a purchase in the last few hours, please let us know how you paid for it (cash, check, credit card) and why you chose that payment method.</td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Derrick</td>
<td>415-***</td>
<td>None.</td>
<td>If you've made a purchase in the last few hours, please let us know how you paid for it (cash, check, credit card) and why you chose that payment method.</td>
</tr>
<tr>
<td>3:30 PM</td>
<td></td>
<td>*****</td>
<td></td>
<td>If you've made a purchase in the last few hours, please let us know how you paid for it (cash, check, credit card) and why you chose that payment method.</td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Derrick</td>
<td>415-***</td>
<td>None.</td>
<td>If you've made a purchase in the last few hours, please let us know how you paid for it (cash, check, credit card) and why you chose that payment method.</td>
</tr>
<tr>
<td>1:30 PM</td>
<td></td>
<td>*****</td>
<td></td>
<td>If you've made a purchase in the last few hours, please let us know how you paid for it (cash, check, credit card) and why you chose that payment method.</td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Derrick</td>
<td>415-***</td>
<td>None.</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>1:29 PM</td>
<td></td>
<td>*****</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Derrick</td>
<td>415-***</td>
<td>Visa. People use the word to mean &quot;credit card&quot; in general.</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>11:49 AM</td>
<td></td>
<td>*****</td>
<td>Train ticket, paid with cash due to the amount of purchase three dollars</td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Bethany</td>
<td>415-***</td>
<td>I paid a copay at drs office with visa checking card. I dont usually have</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>11:49 AM</td>
<td></td>
<td>*****</td>
<td>cash and prefer quick withdrawal from acct</td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Donna</td>
<td>415-***</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11:32 AM</td>
<td></td>
<td>*****</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Simon</td>
<td>415-***</td>
<td>Debit bc I am out of cash</td>
<td>If you've made a purchase in the last few hours, please let us know how you paid for it (cash, check, credit card) and why you chose that payment method.</td>
</tr>
<tr>
<td>8:28 AM</td>
<td></td>
<td>*****</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Bethany</td>
<td>415-***</td>
<td>Visa. Most commonly accepted. More people seem to have it and feels more</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>8:27 AM</td>
<td></td>
<td>*****</td>
<td>premium than mastercard</td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Randolph</td>
<td>415-***</td>
<td>didnt</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>8:27 AM</td>
<td></td>
<td>*****</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Randolph</td>
<td>415-***</td>
<td>Visa - i have always used it, offered thru much credit union, provides a</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>8:26 AM</td>
<td></td>
<td>*****</td>
<td>nice yr end summary</td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Randolph</td>
<td>415-***</td>
<td></td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>8:25 AM</td>
<td></td>
<td>*****</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Donna</td>
<td>415-***</td>
<td>I really dont run into this situation</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>8:25 AM</td>
<td></td>
<td>*****</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Randolph</td>
<td>415-***</td>
<td>Visa i guess. Seems to imose the least restrictions and is taken everywhere</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>8:25 AM</td>
<td></td>
<td>*****</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Donna</td>
<td>415-***</td>
<td>Paid for parking last night - cash - small amtrak so made sense</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>8:25 AM</td>
<td></td>
<td>*****</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fri 24/04</td>
<td>Randolph</td>
<td>415-***</td>
<td>American Express for my generation because it was what we aspired to when</td>
<td>From 20/20 Research: Welcome to the final day of our study. When thinking about credit cards, which brand do you think has the most appeal? Why?</td>
</tr>
<tr>
<td>8:25 AM</td>
<td></td>
<td>*****</td>
<td>we were young and poor</td>
<td></td>
</tr>
</tbody>
</table>
Online Journals

- Longitudinal, individual research blogs and diaries
- Typically 2-8 weeks, 20-50 participants
- Used primarily for new customer experience, immersive research, and product testing
- Pre-focus group data collection/warm-up
ASSIGNMENT 4B: DAY IN THE LIFE ACTIVITY 3
By D [redacted] on May 22, 2009 3:36 PM

ANY CHANGES AFTER THE MATERIALS

- I would say my attitudes and behaviors have not changed much. I think my awareness has once again been strengthened. I see myself paying closer attention to my usage. For example, in one of my pictures I showed that I keep "things" unplugged when not in use. I then found myself leaving things plugged in, so I would unplug them. When before this, I might not have noticed. Minor, but every little bit helps is my belief.

- I really don't have anything to take a picture of.

- I would say that the reason my behaviors have stayed pretty much the same would be because I was already practicing most of the information provided.

- I think my water usage became a bigger reminder through this project, than did my electricity usage. I'm really trying not to turn the water on full blast every time I turn the faucet on. It just really depends on the need at that time.

ASSIGNMENT 4 REACTION TO MATERIALS
By D [redacted] on May 22, 2009 2:10 PM

ASSIGNMENT 4
MY THOUGHTS FOR TODAY...
By Donna on March 24, 2010 1:09 PM

My attitude towards conserving energy and water hasn't really changed. I will say that I am now more informed of ways to help me save energy and money. I received helpful information from every assignment. For example I did not know that the SRP website was so informative. I knew it had helpful ideas on how to conserve energy. I really have a new view of this website.

Other things that I reviewed through the assignments me and my family were already doing.

I do feel good that whoever is conducting this survey/research is interested in informing people on ways to save energy and at the same time help the earth.

By Donna on September 16, 2009 8:43 AM
Case Studies

- Computer makeovers
  - Phase 1: in-person interviews 1 market, photos pre-loaded
  - Phase 2: 3-day bulletin board with women around U.S.

- B2B concept study
  - 17 concept statements with the same probes (!)

- Issues for a Western state
  - New, long-term residents – separate, then combined BBs
Case Studies

- Automotive target segment
  - Phase 1: “journaling” IDIs online
  - Phase 2: in-person ethnographies with selected respondents

- Air freshener bulletin board
  - Air quality discussed by women in cities, suburbs and rural areas
  - “Shopping” exercise for products as springboard for new ideas
  - Whiteboards of new concepts

- Roper Reports TrendWhys studies on consumer lifestyles
Here are 10 reasons to buy organic: Organic produce is not covered in a cocktail of poisonous chemicals. The average conventionally-grown apple has 20-30 artificial poisons on its skin, even after rinsing. Trust your instincts, and go organic! Fresh organic produce contains on average 50% more vitamins, minerals, enzymes and other micro-nutrients than intensively farmed produce. Science says that it’s good for you. Going organic is the only practical way to avoid eating genetically modified (GM) food. And by buying organic food, you are registering your mistrust of GMOs and doing your bit to protest against them. If you eat dairy or meat products, going organic has never been more essential to safeguard you and your family’s health. Intensively-reared dairy cows and farm animals are fed a dangerous cocktail of antibiotics, growth promoting drugs, anti-parasite drugs and many other medicines on a daily basis, whether they have an illness or not. These drugs are passed directly onto the consumers of their dairy produce or meat., which must be a contributing factor to meat-related diseases like coronaries and high blood pressure. About 99% of non-organic farm animals in the UK are now fed GM soya. And there has never been a reported case of BSE in organic cattle in the UK. Common sense says that organic is safe food. Organic produce simply tastes so much better. Fruit and vegetables full of juice and flavour, and so many different varieties to try! There are about 100 different kinds of organic potatoes in production in the UK, and that’s just potatoes! Organic farms support and nurture our beautiful and diverse wildlife. Over the last thirty years, intensive farming in the UK has led to dramatic erosion of the soil, a fall of up to 70% of wild birds in some areas, the destruction of ancient hedgerows, and the near extinction of some of the most beautiful species of butterflies, frogs, grass-snakes and wild mammals. Organic food is not really more expensive than intensively farmed foods, as we pay for conventional foods through our taxes. We spend billion of pounds every year cleaning up the mess that agro-chemicals make to our natural water supply. And the BSE crisis cost us 4 billion pounds. Go organic for a genuine more cost-effective future. Intensive farming can seriously damage farm workers’ health. There are much higher instances of cancer, respiratory problems and other major diseases in farm workers from non-organic farms. This is particularly true in developing countries, and for agrochemical farms growing cotton. So go organic if you care about other people. And if you simply like the idea of your children and grandchildren being able to visit the countryside and play in the forests and fields just like we did when we were young, go organic for the sake of all of our futures.
Why Use OQR?

- Go anywhere without going anywhere
- Flexibility in questioning, methods, activities
- Rich individual responses and ability to probe
- Longer interviews – even post-study follow-ups
- Groups with little group influence – and the trap door!
- More mixing of people
- Anonymity – greater honesty/frankness
- Instant transcripts
OQR Issues

- OQR – of course – is and will not be the only way to “get close to the customer”
  - Seeing people firsthand, product touching/tasting, etc.
  - Some clients will not accept OQR

- Researchers need to be realistic
  - Time demands, more materials = more work
  - Not the “big money-makers” some expect

- Some technology challenges
The Future of Online Qualitative

2011 and Beyond
Seeing participants in video/pictures data adds new level of insight

See and hear participants using product or answering questions

We collect more visual data every day in 2010 than we did in all of 2007
Hybrid Research Takes Flight

- Today’s tools allow a wide variety of combinations:
  - Face-to-Face (F2F) + Online
  - Online + Online
  - Quant + Qual

- Hybrid qualitative can be greater than the sum of its parts with lower total cost and time

- Researchers can engage participants in variety of ways to understand them from all angles
“Toolbox” Mentality Grows

- Researchers more adept using different tools in different situations
- Marketing needs drive demand for multi-faceted research
- Researchers, clients work more closely to examine multiple approaches to solve problems
Questions?