qualitative research

Old methods, new approaches

By Steve Richardson

The evidence of the positive impact of technology is all around us. Work is completed faster. Business processes are more efficient. Results are delivered more quickly. And for qualitative researchers, technology has opened the door for expanded business opportunities that in some cases didn't exist even five years ago.

As in many sectors of business, the adoption of technology in the qualitative research field varies by practitioner. Traditional methods of research and reporting are working just fine for some researchers and clients. For others, the exploration and use of new technologies is driving new methodologies. In some cases, emerging technology is changing what some clients expect from their qualitative research partner.

For example, last year a major cosmetics manufacturer was redesigning its Web site and the initial plan was to conduct in-person usability interviews in New York City. Participants would navigate and explore three different proposed Web site designs and offer input to the research team. The client partnered with Kristin Schwitzer, founder of Beacon Research, Severna Park, Md., and a member of the Qualitative Research Consultants Association (QRCA), to rethink the plan. They elected to first conduct concept research using online bulletin boards prior to performing usability research. But it was the methodology of the second phase of the research - a first of its kind for the brand - that got the team excited.

Schwitzer conducted online usability interviews - using Web cams, phones and screen-sharing technology - to conduct live research with participants located throughout the country. Both the researcher and the participant used Web cams and the phone simultaneously, which allowed Schwitzer to communicate live and "read" participants just as one would in an in-person focus group or usability interview. The screen-sharing technology - in which both participants see each other as well as the same images - allowed the participant to navigate through the prototype Web site and have cursor control, which was visible to both the researcher and observers.

Online usability research allowed the project team to include participants from around the country without the expense of travel. In addition, respondents were able to test the new Web site in a natural setting, and

Technology brings efficiency, opportunity to qualitative researchers and clients

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the design unearthed very specific learning on respondent likes and dislikes regarding the three designs and on the prototype as it was developed.

Increasing demand

This is just one example of the growing adoption of "collaborative software" - tools that enable people involved in a common task like qualitative research to achieve their objectives. And while it is just one example, it is indicative of an increasing demand by clients for their research partners to understand and use emerging technologies in their projects.

"My clients' needs drive the platforms and technology I use," says Matthew Towers, founder of Towers Research Group, Fairfax, Calif., and a former co-chair of the QRCA's technology committee. Towers cites a current project in which the agency and the client use Adobe Connect or Basecamp to share communications, files and scheduling; as a result, he uses the technology as well.

Kevin Kimbell, a QRCA member and founder of San Francisco-based TKG Consulting, takes it a step further. "I use technology know-how as a competitive advantage. The fact that I know and embrace technology puts me in a smaller group of researchers vying for the same work," Kimbell says. But like most tech-aware qualitative researchers, Kimbell is quick to point out that the technology isn't the driving force, but rather it's the clients' needs and outcomes that determine how he uses technology. "I don't evangelize any particular technology - I use what the client needs to achieve their goals."

Tools have emerged

There are many technology-based tools that have emerged in the last five to 10 years. Some have become commonplace for marketers and qualitative researchers; some are so new that the technology to support them is in its infancy.

Online bulletin boards - also called online discussion groups - have become one of the most popular qualitative methodologies created by the advent of the Internet. Online bulletin boards take many different forms, as dictated by the research needs, but

they drive participants to a Web-based bulletin board where they can comment on and post stimuli, react to stimuli and react and respond to researcher prompts or to other study participants.

Some of the biggest advantages of online bulletin boards are that they eliminate geography and travel as potentially complicated and costly factors in research. Participants come and go when they want - over days or even months - and they participate at times that are most convenient to them. This opens the door to a volume and geographical spread of participants that would have been impossible to achieve pre-Internet. Further, online bulletin boards allow for activities that are difficult or impossible to do in an in-person group setting. For example, being able to get parents to ask their child about some stimuli in the middle of the discussion and having them report back to the group about their child's reactions.

Online bulletin boards give the qualitative researcher many unique advantages, including the ability to decide if and when the participants will be able to see each other's posts, and the ability to link them directly to other Web sites or online stimuli. In addition, researchers have an immediate and exact record of the discussion that eliminates the cost and time of transcription.

"Every participant answers every question in as much depth as they want, so I am able to cover more ground at a deeper level as a result," says Dorrie Paynter, founder of San Francisco-based Leapfrog Marketing Research and co-chair of the QRCA's technology committee. "I've also noticed participants are more willing to express diverse opinions as they aren't worried about hurting the feelings of the person sitting across the table from them. The result is less group-think," she says.

Kimbell adds that he likes this technology for online journaling - either a series of one-on-one interviews taking place over a few days or a week, or simultaneous one-on-one interviews. The journaling concept allows him to ask questions, give assignments and ask for feedback in a more direct,

one-on-one way that he says often garners some of his best findings.

In a recent project for Hawaiian Airlines, Paynter was brought in to get a greater understanding of the full customer experience of flying with the airline. She considered traditional paper journals, video journals and focus groups, and settled on online interactive photo journals, a form of online immersive research, because of their ability to combine text and photo entries with ongoing, almost real-time interaction with the participants throughout their travels. "It was like we were living with their customers before, during and after their trip, and the ability to communicate with them while they were still traveling made the learning much more insightful and targeted," she says.

"The technology allowed an unlimited number of our internal stakeholders to follow the passengers' journeys as they unfolded, which allowed executives beyond the core research team to get engaged in the research," says Rick Peterson, vice president of sales and marketing at Honolulu-based Hawaiian Airlines.

Meet and collaborate

Webconferencing services like WebEx, Enunciate and Go2Meeting allow two or more users to interact, meet and collaborate in real time over the Internet. They have made research and reporting easier by eliminating geographic boundaries, and more clients are embracing the technology.

Paynter finds Webconferencing particularly useful in presenting findings to clients. Not only is geography not an issue, but Paynter says that this reporting method helps ensure that clients are truly understanding and processing her research results. "Clients don't always have the time to read full reports, so this is a great way to emphasize key points and encourage discussion to help the team internalize what we've learned," she says.

Towers adds an important point for researchers. He says that when his clients - mostly technology-focused companies - want to use Webconferencing technology, he has no choice but to adopt it himself. "Their expec-

tation is that I can use the same technology that they use in their own business," he says.

Internet streaming allows people - like client-company executives - to see focus groups live without having to be at the facility in person. A client team can sit in a conference room at their own headquarters and watch the focus group or they can watch from their home, office or any computer with a broadband Internet connection. In most cases, a smaller client team sits in the backroom at the research facility. In-person and remote viewers can chat and communicate live during the focus group session.

In addition to the obvious benefits to the client, Internet streaming technology helps the researcher with recording and reporting as well. Video of the session sits in a server for a period of time after the session, allowing the reporter or writer to view it at their convenience. The technology also allows reporters to search for certain words phonetically so they can, for example, easily find the point in the session where a brand name or company name was mentioned. Video highlights can easily be pulled out for reporting as well. "The technology is getting better and better," Kimbell says. "The storage and analysis tools in particular are really helping make qualitative researchers' jobs easier."

Eric Rasmussen, director of consumer insights for online photo service Shutterfly Inc., Redwood, Calif., recently traveled with a product manager to conduct focus groups in various parts of the country. Shutterfly used streaming software to allow team members at the home office to view the focus groups live without having to travel, communicating comments, questions or suggestions via online chat during the sessions. "The benefits were simple but important," Rasmussen says. "The end result was a richer understanding and buy-in of the qualitative findings when we shared them with the larger organization." He predicts an increased popularity for Internet streaming as clients see the many advantages of the technology.

Online survey software tools like Zoomerang and SurveyMonkey can be useful tools for pre-screening research participants before they get to the recruiter stage. Paynter says online survey software is simple and inexpensive to use and surveys can be developed quickly and sent to a large number of participants. This enables researchers to weed out less-qualified participants in an efficient manner before the recruiter makes calls.

Paynter adds that online surveys are good for studies that are a hybrid of quantitative and qualitative research, and they can be useful before and/or after qualitative research. Paynter cites the launch of a new curriculum-based educational software product from the Learning Company, in which she used both qualitative and quantitative research to help guide development. The team found that conducting a series of online discussion board groups with parents and educators first helped the client better understand what issues to pursue in the quantitative survey, and how to word the questions to get at important information. "We even used some of our discussion board participants to conduct a trial run of our survey before we launched it. Online software makes this multi-step process much more efficient and cost-effective than it was in the past, and the end result is much clearer insights," says Bryan Rodrigues, director of consumer brands for the Learning Company, San Francisco.

Exciting time
Embracing technology is important because efficiency and convenience are major drivers for both clients and researchers. Paynter says technology has expanded the number of tools in the researcher's toolbox. "Technology has broadened the number of methodologies I can use to help clients achieve their research objectives, and my clients are appreciative of my ability to efficiently and, more importantly, effectively deliver their results."

Towers adds that many technologies are still evolving, and many more are on their way. "In relatively short order, there will be more common platforms for collaboration. The big technology companies are continually developing platforms that will change the landscape for years to come," he says. "It's an exciting time to be a researcher." | Q