

The Big Bang:

The Rapidly Expanding World of Online Qualitative Research

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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



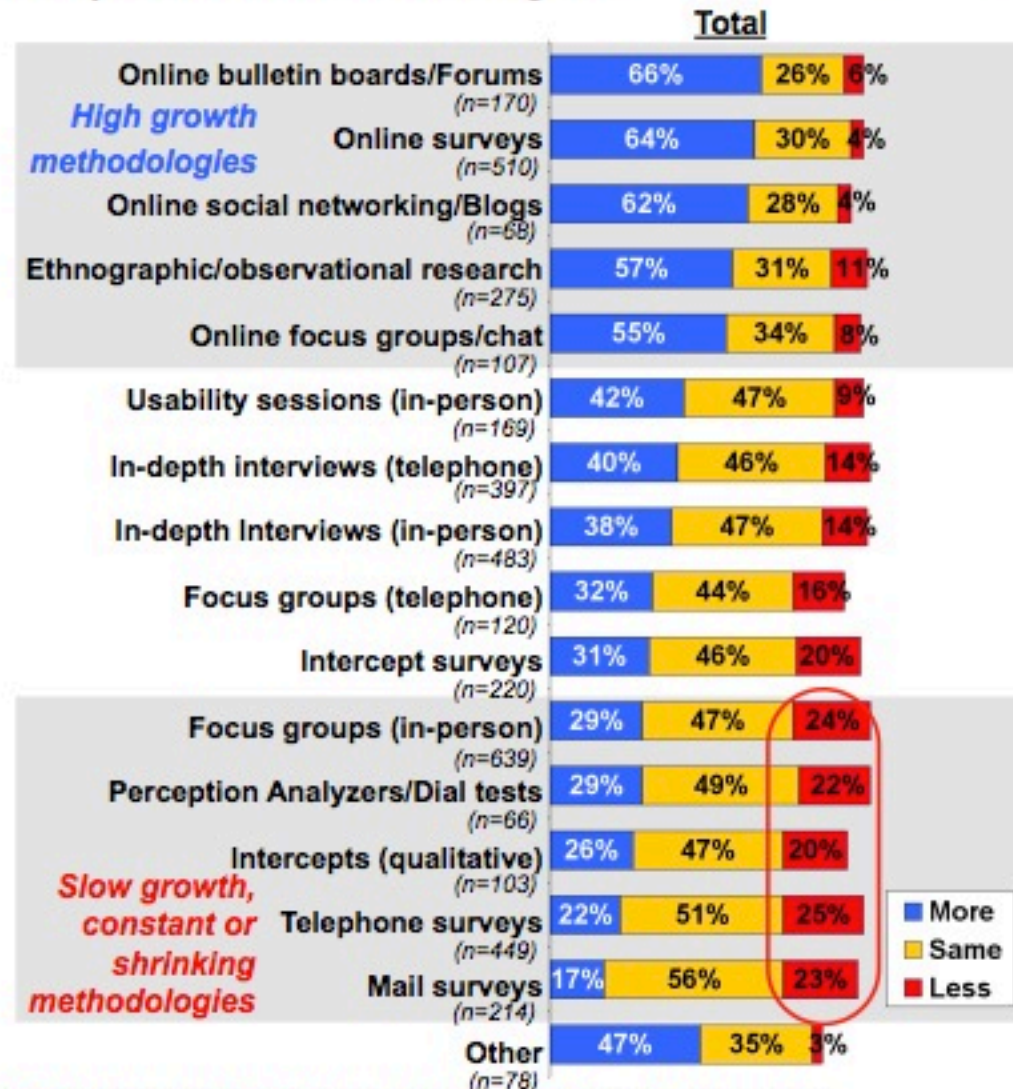
~2008: Rapid growth of online methods

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.



↑↓ 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]? 13

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
socials dynamics shaping
market research



The Confluence



Demographics

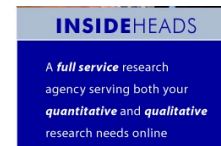
We're an online society now

- 75% of the US is online
- More comfort sharing, engaging online
- Internet adoption across socioeconomic, age groups

Methodology and best practices

**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





Tools

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

Stene Carderom (Moderator)

As with the last board, let's get started with introductions! Please tell us about yourself! Where do you live? Where do you work? Got kids? Pets? If so, are you getting a pet snuggie for it? Do you have a motorcycle? Feel free to just talk about yourself here all you want. You can make up a back story or play the part of your pseudonyms. Its up to you :) Just have fun!

And as an incentive to answer we've "masked" this discussion. So to see what everyone else had to say...you have to answer the question first.

Also, we encourage you to upload a profile picture! You know if you want to let that anonymity thing go. To do this, just click [Update My Profile](#) on the left margin of the screen, click the bit BROWSE button on the screen that loads, and find your pic. Remember to contact tech support (as opposed to your moderator) if you have any difficulty with this, and someone from our world class support staff will be happy to assist you!

March 28, 2010, 2:16 PM

Info

0 Backroom Notes Edit

Question Settings

March 25, 2010, 6:15 AM

Info

0 Backroom Notes Edit

March 25, 2010, 8:39 AM

January 14, 2010, 9:53 AM

Info

1 Content Tags 0 Backroom Notes Edit

tara January 14, 2010, 9:55 AM

Excellent Ingrid I'm so glad you could join us! What was your favorite film to star in?

Reply 0 Content Tags 0 Backroom Notes Edit

NEW! John Smith March 11, 2010, 11:15 AM

That's a wonderful insight... please tell me more!

Reply 0 Content Tags 0 Backroom Notes Edit

Only natural pesticides used for fruits and vegetables, no growth hormone or antibiotics fed to animals.

lowfat VANILLA smooth & creamy

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

Type your comment here.

Ingrid Bergman

My name is Ingrid and I am an actress. I was born in Stockhom, Sweden. I speak English, French, Italian, German and Swedish. I have 3 daughters and a son.

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

tara (Moderator)

We're going to talk about something fun. Let's pretend you are at a party. And the party attendees are music, television, movies and books. I want you to treat all three of these things as if they are actual party attendees.

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)



Info

Reply

Question Settings

amber

November 19, 2009, 8:40 PM

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.



Info

Reply

0 Content Tags 0 Backroom Notes Edit

jade

November 19, 2009, 9:33 PM

Well, of course, there is music blaring, television broadcasting (large plasma screens all around the room,



Jane Smith (Moderator) (Online)

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!



Info



Reply



Question Settings

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 arean 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! 😎



Info



Reply



0 Content Tags



0 Backroom Notes



Edit

NEW! Melissa Strong

March 21, 2010, 5:42 PM



John, I used to live in Seattle--- I love it there!



Info



Reply



0 Content Tags



0 Backroom Notes



Edit

NEW! Heidi

March 28, 2010, 2:16 PM ☆

Only natural pesticides used for fruits and vegetables, no growth hormone or antibiotics fed to animals.



Info

0 Backroom Notes Edit



Info

Question Settings

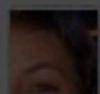
March 25, 2010, 6:15 AM ☆



Info

0 Backroom Notes Edit

March 25, 2010, 8:39 AM ☆



Info

0 Backroom Notes Edit

March 25, 2010, 9:04 AM ☆



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

Type your comment here.

Reply



Reply

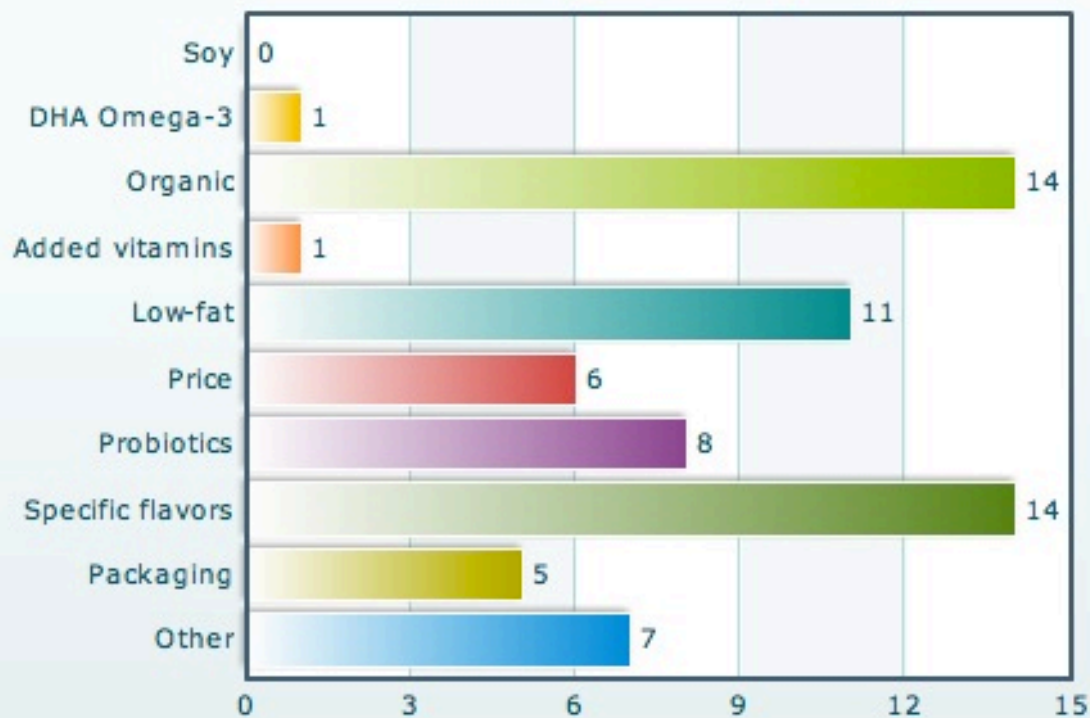
0 Content Tags 0 Backroom Notes Edit

Jane (M

What are
why each

Rep

Chart Responses (67 Responses)



NEW! Eriann

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.

Reply

4 Content Tags 0 Backroom Notes Edit

Info

Info

to 5 and state

Chart Responses Question Settings

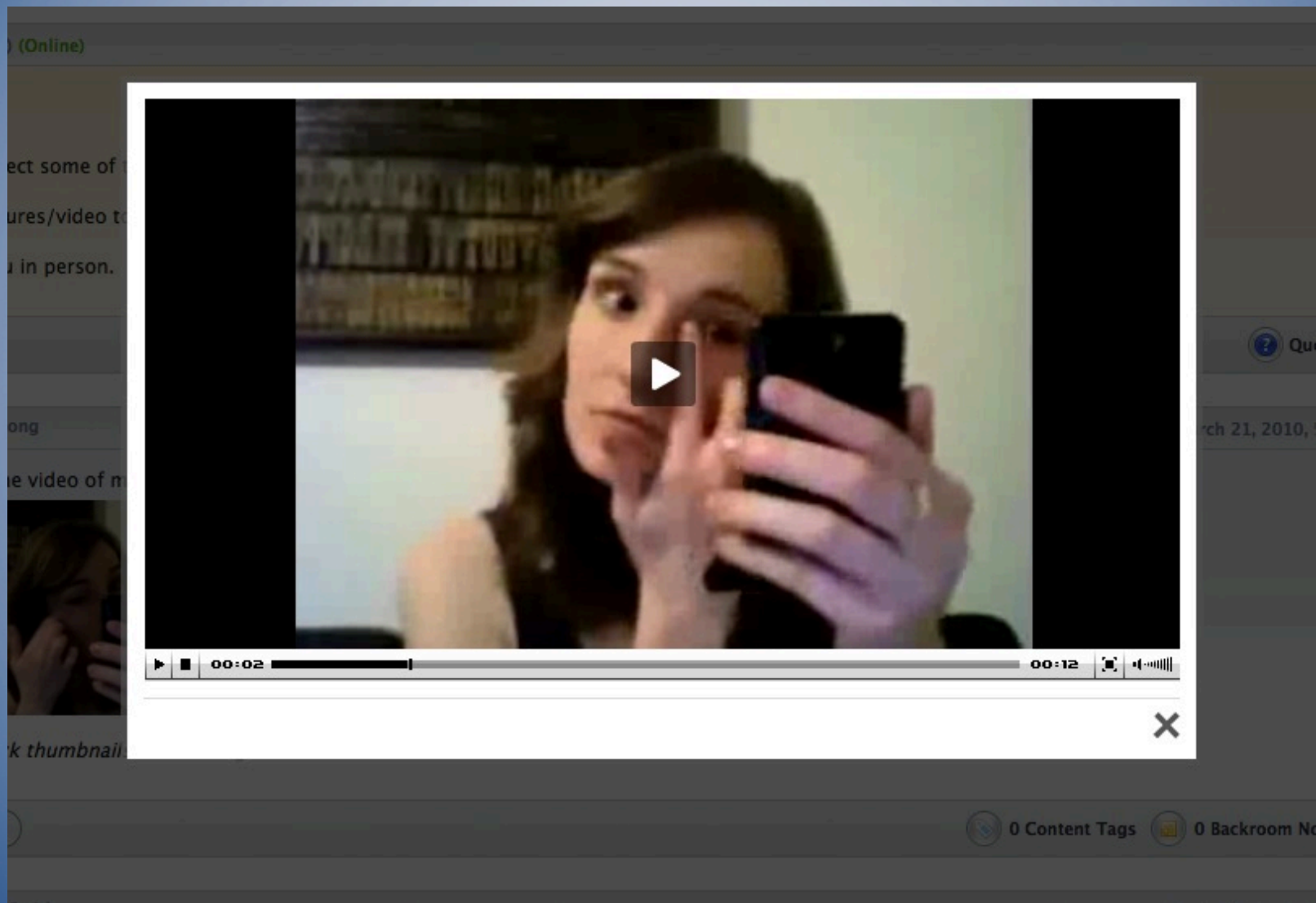
March 25, 2010, 6:05 AM ☆

Info

this can be a
or Yoplait are the
(nt), Brown Cow's
full fat and I

nt Tags 0 Backroom Notes Edit

Participant-generated content: Video Journals



Live Focus Group Chats

The screenshot displays the e-FocusGroups web interface. At the top right, the logo for e-FocusGroups is shown with the tagline "Insight... At The Speed of Now" and a welcome message "Welcome to The Idea Room". A light blue callout box points to the top right corner, stating: "Whiteboard: Can show logos, Graphics, web pages, Etc.".

The main chat area on the left lists participants and their messages. A light blue callout box points to the word "Moderator" in the chat log, stating: "Moderator text is blue".

On the right side of the chat area, there is a designated space for a "Respondent chat area", indicated by a light blue callout box.

At the bottom of the chat area, a "Text entry bar" is visible, with a light blue callout box pointing to it. To the right of the text entry bar, there is a section for "Emoticons" with a light blue callout box pointing to it.

The bottom of the interface includes a "Send" button, a "Review" button, and a "Log Off" button.

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



e-FocusGroups®

Insight... At The Speed of Now

Welcome to The Idea Room

Whiteboard:
Can show logos,
Graphics, web pages,
Etc.

Moderator
text is blue

Respondent chat area

David_Mod: 1. What is your initial impression of how easy or difficult this site will be to use?

Nancy: ready

Barbara: haven't seen it! I think I need

Dale: 😊 Dale is ready!

Nancy: drab

David_Mod: Remember to number your answers

Jenna: 1. I think the site is well-organized but a little text-heavy

Jeffrey: easy, although it might be better to explain what is going on in each area, as I am not familiar with Paris

Jeffrey: 1.

David_Mod: Nancy, please say more

Josh: 1. its simple and effective ... graphics are boring

Nancy: 1. too simple not enough graphics

Jenna: I think more art would make it easier on the eye

Chad: 1 seems easy to use - a little boring.

Jeffrey: 1. yes a live picture of the areas would be helpful, cafes, bars, ets

David: 1. I think it is a little too cluttered

Tom: just want to make sure I have it up what should I be seeing right now

Jenna: 1. but I do like the colors in the logo

Josh: 2. I'd expect advertisements, it would be nice to have some additional resources of interest

Cheryl: First page needs to be more appealing as well as more informative

Dale: 1. It looks easy to use. Well laid out and I like the categories I think they're the right ones right off the bat - i.e. location and cost and luxury level etc.

Nancy: 1. I like the drop down menus

David_Mod: Tom, you should be seeing www.parishotels.com

Tracy: 1. This site looks very easy to navigate. Having so many search options would make it easy to zero in on a particular place. The page is a little boring. A nice picture would make me more interested in seeing what else the site has to offer.

Tom: is says click here to see paris hotels in blue

David_Mod: 2. As you look at the home page, is there anything that confuses you?

Jeffrey: 1. I agree with Tracy, need to see where I am going and what I can do there

David: 1. Another comment it does remind me of a

Josh: 1. what about dates?

David: all are still keeping the page

Tom: dly

Jeffrey: uses me but it does not "draw" me to a certain area

David: your question about dates?

Tracy: 2. Nothing is confusing so far. As instructed, I haven't clicked on anything yet so I'm basing this only on what I see without any action on my part.

Text entry
bar

Emoticons

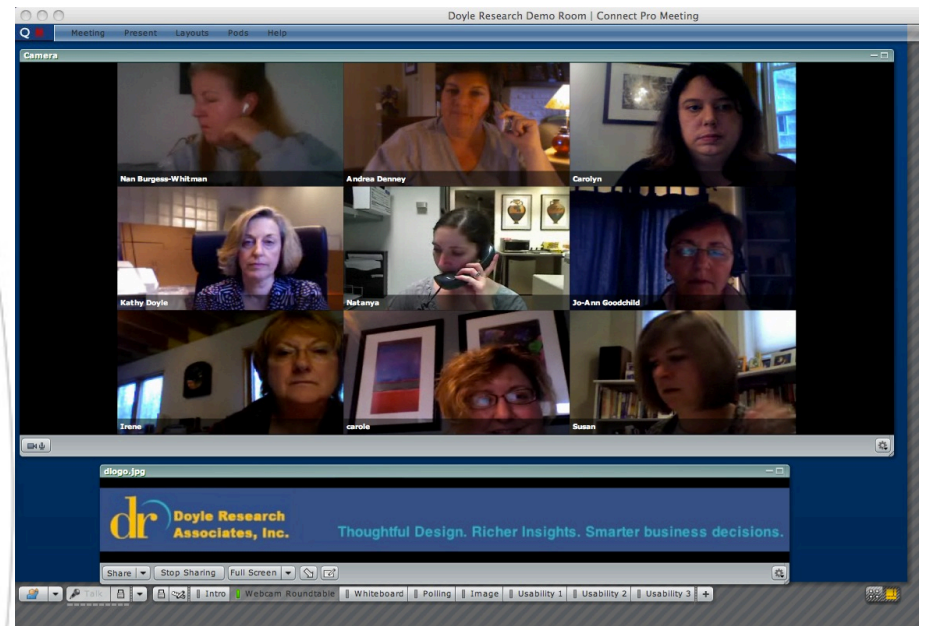


Send

Review

Log Off

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

Webcams

Isaac Rogers

Steve

Jim

Sheena

Jayme

Share

Picture: 2.jpg

Logo A

logo

Too "boring"

Logo B

SUMMIT

My Favorite!

Logo C

Generic Logo

This looks too much like your main competitor!

100% Star 1x

Share Stop Sharing Full Screen

Chat 6

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

To: Everyone

2020 blue logo.jpg

20/20

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Share

Mobile Qualitative



- Reach participants “at the moment”
 - Shopping
 - TV watching
 - Meals/snacking
- Collect data without taking them out of their normal lives

QualAnywhere Transcript: Credit Card Usage



Date & Time	Sender	Phone	Reply Message	Original Message
Fri 24/04 3:33 PM	Bethany	415-***-****	Cash one purchase was a small amt and I had the cash. Second purchase store took cash only	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.
Fri 24/04 3:30 PM	Derrick	415-***-****	None.	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.
Fri 24/04 1:30 PM	Derrick	415-***-****	None.	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.
Fri 24/04 1:30 PM	Derrick	415-***-****	None.	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.
Fri 24/04 1:29 PM	Derrick	415-***-****	Visa. People use the word to mean "credit card" in general.	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?
Fri 24/04 11:49 AM	Bethany	415-***-****	Train ticket, paid with cash due to the amount of purchase three dollars	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.
Fri 24/04 11:49 AM	Donna	415-***-****	I paid a copay at drs office with visa checking card. I dont usually have cash and prefer quick withdrawal from acct -	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.
Fri 24/04 11:32 AM	Simon	415-***-****	Debit bc I am out of cash	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.
Fri 24/04 8:28 AM	Bethany	415-***-****	Visa. Most commonly accepted. More people seem to have it and feels more premium than mastercard	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?
Fri 24/04 8:27 AM	Randolph	415-***-****	didnt	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.
Fri 24/04 8:27 AM	Randolph	415-***-****	Visa - i have always used it, offered thru much credit union, provides a nice yr end summary	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?
Fri 24/04 8:26 AM	Randolph	415-***-****	I really dont run into this situation	From 20/20 Research: Randolph- Do you ever avoid certain retail establishments because they don't accept credit cards? If so, why?
Fri 24/04 8:25 AM	Donna	415-***-****	Visa i guess. Seems to imoose the least restrictions and is taken evewhere	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?
Fri 24/04 8:25 AM	Randolph	415-***-****	Paid for parking last night - cash - small amtrak so made sense	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.
Fri 24/04 8:25 AM	Simon	415-***-****	American Express for my generation because it was what we aspired to when we were young and poorB	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?

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



QualJournal...
Your opinion
matters.

We're really looking forward to getting to know you better and hope you are as excited about this study as we are!

20/20

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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] T on May 22, 2009 2:10 PM

ASSIGNMENT 4



Assignments

Check here often for the latest assignments and information.

[Print Your Complete Postings](#)

[Overview of Assignments and Due Dates](#)

[How To Complete The Assignments](#)

Assignment #1 [redacted]
Due Saturday
5/9 @ 11:59PM

Assignment #2: [redacted] (Or [redacted])
Due Thursday
5/14 @ 11:59PM

Assignment #3: Reaction to Materials [redacted]

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



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

Verbatim example

(469 words) 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



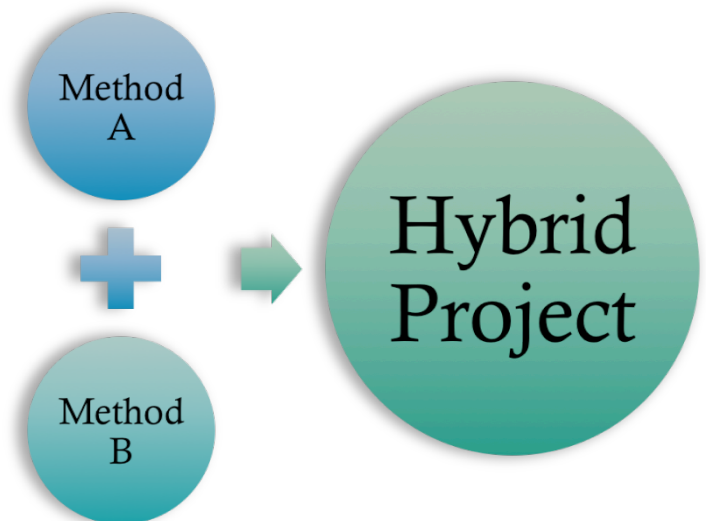
Participant Media Increases

- 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?

