



Choose the Right Online Qualitative Tool for Your Project

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Overview

Online qualitative research tools can often provide faster, deeper insight than traditional techniques, at lower cost. As online consumers increasingly expect immersive, interactive (and even entertaining) experiences on the web—and as they keep growing in number and diversity—these methods offer a “win-win” experience for both respondent and researcher alike. The key is to match your research objectives to one of the many tools now available:

More time in field,
more data-rich



Less time in field,
less data-rich

- **Online diaries (“immersive” research).** Asynchronous one-on-one discussion boards, though some respondent interaction may be allowed. Used for deeper-dive explorations conducted over 1-2 weeks.
- **Online bulletin boards.** Asynchronous (**not** real-time) discussion boards completed over 2-7 days.
- **Online usability testing.** Remotely captures an individual’s experience using a website or software. Tests can either be self-guided by the respondent, or designed as a moderated discussion while the respondent is using the website/software online.
- **Remote video discussions.** Asynchronous video question/video response one-on-one discussions; can be expanded to a group discussion via web conference.
- **Online focus groups.** Usually involve recruiting respondents for a 60-90 minute, real-time online group chat.
- **Online chats.** Short, real-time one-on-one interviews via chat/instant messaging midway through a web survey to dig into a particular topic.

This paper explores the advantages and disadvantages of these approaches in general, as well as considerations when deciding which specific method to use.



Pros and Cons

While you can use these methods to explore topics in-depth from the convenience of your own desk, they are *not* a panacea for every research need.

Table 1. Online Qualitative Research Pros and Cons

Pros	Cons
<ul style="list-style-type: none"> • No travel necessary for the researcher or client, which saves time and money. • No geographic recruiting limitations. Get a broader audience and wider diversity of opinion, and find low-incidence populations. • Greater anonymity. Respondents may feel they can be more candid and honest. • Saves time and hassle. For many, logging on is easier than taking time to travel to a central focus group facility. • No time pressure/scheduling requirements. Respondents often can participate at their own pace, and give more thoughtful responses. • Research is fun! The online experience can be engaging for respondents, an increasingly important consideration. • Multimedia is easy to incorporate. Moderators and respondents can post pictures, music and video clips linked to questions/responses. • No more waiting for transcripts. Online discussion generates transcripts automatically. 	<ul style="list-style-type: none"> • Can't read body language. It's difficult to completely capture voice tone, inflection and surrounding environment that may influence a response, even when using video. • Harder to establish rapport. Lacking face-to-face interaction, it can be more challenging to make a connection with respondents, depending on the topic. • Respondents can't taste, touch or smell stimuli. However, with the advent of virtual worlds and "smell technology" efforts, it may just be a matter of time! • Complete confidentiality is challenging. With highly confidential prototypes, for example, there is a risk that stimuli will be appropriated by respondents. • Difficult for special groups. Using in-depth online tools may end up an exercise in frustration for slow typists, those with reading/sight disabilities and late technology adopters. • Bandwidth-dependent. Almost half of American households do <u>not</u> have high-speed Internet, a must-have for studies incorporating rich media.

Considerations When Choosing an Online Qualitative Method

Online qualitative methods are highly adaptable given the research situation.

Some key considerations are:

Stimuli
 What types of stimuli are involved—complex or simple?

- **Timing.** How quickly must the research be conducted?
- **Format.** Is the topic best suited for one-on-one or group discussion?
- **Stimuli.** What types of stimuli are involved—complex or simple? Graphics, video and sound or text-only?
- **Target Respondent.** Is your target young or old? How tech-savvy are they?
- **Recruiting method.** Which is more appropriate—a phone recruit (general consumers, older audiences), or a panel that specializes in online recruiting (online audiences, Millennials, early tech adopters)?
- **Number of recruits.** How many people do you need to recruit? Attrition can be high; plan to over-recruit by at least 50% to ensure desired show/completion rate. And, provide sufficient incentive for multi-week studies.
- **Output.** Is a text summary sufficient, or do you need multimedia to help tell a story? Online methods generate a lot of data; transcripts are long and can be challenging to organize. Build sufficient time into the schedule for organizing, analyzing and reporting.
- **Cost.** Is the method cost-effective? Many methods can yield savings over traditional methods. However, cost will vary by provider and target respondent, and should be evaluated on a case-by-case basis.

The following table provides a guide for choosing which method is the best fit for your study.

Table 2. Online Methods: What They Are

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	Online Diaries (immersive research)	Online Bulletin Boards	Online Usability Testing	Online Focus Groups	Remote Video Discussions	Online Chat
Format	One-on-one. Asynchronous diary question and answer format between moderator and respondent, with ability for limited group interaction.	Group. Asynchronous (not real-time) discussion between moderator and multiple respondents. Has ability to restrict to individuals for certain topics.	One-on-one. Real-time remote one-on-one interview with screen sharing between moderator and respondent.	Group. Real-time 60-90 discussion between moderator and multiple respondents.	One-on-one / group. Video question and answer between moderator and respondent(s). Can be asynchronous or real-time.	One-on-one. Real-time 10-15 minute instant messaging session between moderator and respondent during web survey. Invite respondents to chat at intercept. Include extra incentive for participation.
Fielding Period	1-2 weeks	2-7 days	2-7 days	2-3 days	2-3 days	One or more 4-hour "intercept" sessions with several moderators
Number of Respondents	12-15	12-15 per group	12-15	6-8 per group	12-15 individuals; can do groups of 6-8	40 or more from web survey total sample
Respondent Characteristics	Diligent, responsive, articulate.	Diligent, responsive, articulate. Must log on 30 mins/1 hour per day.	Must have computer, screen resolution and bandwidth compatible with video screen-capture software.	Able to keep up with quick discussion pace.	Must have a computer/Internet connection that works well with a video camera. Send camera to participants as part of incentive. Carefully screen for respondent articulateness, completeness (method provides limited ability to probe).	Survey logic can be programmed to select only "qualified" respondents for chat.
Stimuli	Can accommodate more complex ideas. Richer insight yielded from image/video involvement.	Simple—easily understood (visual images, video or text).	Live dynamic website or software.	Simple—quickly viewed/read and comprehended (visual or text).	Simple—easily understood ideas.	Restricted to what's shown in web survey.
Output	Transcript with attached images and links to audio/video files.	Transcripts.	Video files of screen-capture.	Transcripts.	Video files.	Transcripts and moderator summary report.

Table 3. Online Methods: When and How to Apply Them

	Online Diaries (immersive research)	Online Bulletin Boards	Online Usability Testing	Online Focus Groups	Remote Video Discussions	Online Chat
When to Use	Deep exploratory research to elicit rich, detailed response. Complex concept/idea, projective techniques, persona development.	Quick concept exploration; sensitive subject matter; time-constrained audience (allows them to respond on flexible time schedule).	Website testing and observation.	Fast-turn projects with limited stimuli.	Remote capture of non-verbal facial communication. Often supplements quantitative findings.	Quick qualitative read on concept or message. Greater ability to probe than with simple open-end.
Moderator Considerations	<ul style="list-style-type: none"> • Important to build rapport. • Build in contact with respondents at least on a daily basis to maintain engagement. • Carefully screen for depth, articulateness. 	<ul style="list-style-type: none"> • Plan for short, frequent digestible questions. • Intensive, ongoing interaction. (4+ hours/day). 	<ul style="list-style-type: none"> • Observation, limited in-depth probing. • Can be self-administered when no probes needed or time-constrained. 	<ul style="list-style-type: none"> • Estimate 2 mins per question, or 40-45 mins per 90-minute group with room for 10-15 follow up probes. • Schedule groups 30 minutes apart. 	<ul style="list-style-type: none"> • Practice video presentation skills. 	<ul style="list-style-type: none"> • Observe but no real-time ad-hoc probing. • Ensure sufficient recruiting effort to achieve desired sample size during chat time window. • May want to spread chat over several days if using quotas.
Observer Considerations	Allows for intensive, ongoing monitoring if desired.	Allows for intensive, ongoing monitoring if desired.	Can observe live, use hidden chat with moderator to include probes.	Fast-paced—limited ability for real-time input.	Must take time to view video files. Limited ability to probe.	Observe but no real-time probing.
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If you're interested in digging a little deeper into this topic, watch for upcoming white papers from Zanthus that will focus on specific online qualitative research methods.



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