

COMBINING QUAL AND QUANT ONLINE

FAST, COST-EFFECTIVE AND ACTIONABLE

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INTRODUCTION

The earliest applications of the Internet for marketing research were for standard quantitative surveys in which practitioners focused on the mechanics of making both the interview experience and analytic process as close as possible to those of conventional telephone surveys. Similarly, as the technology evolved and researchers began experimenting with the Internet as a vehicle for qualitative research, their first efforts (via AOL around 1994) aimed at achieving, to the extent possible in a virtual environment, the procedural format and interactive dynamics of a traditional in-person focus group. Limitations inherent in the real-time process made these early online groups somewhat cumbersome, but many of the difficulties were subsequently overcome by the introduction, in 1998, of the asynchronous “bulletin board.” This approach did not attempt to imitate the face-to-face model; rather, it collected respondents’ contributions on their own schedules and at their own pace over the course of a predetermined period of time, without limitations on the depth of their responses.

Further technological advances shortly after the turn of the century made it possible to shield each participant’s comments from the view of all other participants. Although this of course is the exact opposite of what is desirable for focus group interaction, it opened the door to an extremely efficient means of conducting relatively large

numbers of qualitative individual interviews online. It is this methodology that was used in the case study reported in this paper.

THE SITUATION

A respected American university believed that the public in general and the academic community in particular held an outdated and unrealistically narrow understanding of the institution – one that mainly recognized the entrepreneurial management program for which it was initially and very favorably known. In fact, over the years, the school had developed various additional fields of study – including arts and humanities, math and science, history, philosophy, etc. – not only offering standalone courses, but also integrating these subjects with the business curriculum in an innovative cross-disciplinary program.

University officials formulated five alternative positioning concepts aimed at expanding perceptions of the school’s academic breadth; and, given their modest research budget, sought an inexpensive way to assess the concepts’ effectiveness, both monadically and comparatively. An important requirement explicit in the main objective was that the results provide not simply a “winner” among the test candidates, but also, and especially, *qualitative* insights (for later marketing communications development) as well as a reasonable degree of numerical comfort. Moreover, speed was an issue:

the school was looking for results in time to develop and deploy appropriate strategic initiatives in advance of the forthcoming academic year.

Finally, as with any institution, this one had many different constituencies that needed to be represented in the research population, ranging from current and prospective undergraduates, current and prospective graduate students, and alumni of both levels ... through various faculty and administration departments ... to pertinent external groups such as parents of students and employers of graduates. Indeed, it was with considerable difficulty that the number of segments was confined to 14.

THE PROJECT

The research challenge

The cost and time constraints virtually dictated that an online methodology was the best – indeed the only – practicable approach. That part was easy. The hard part was to devise a design that could accommodate the 14 sample segments and still yield the qualitative data desired – and at the same time be user-friendly to respondents and process-friendly (or at least process-possible) to the Internet data collection service provider.

Prior to this study, use of the Internet for qualitative individual interviews had usually been limited to relatively small sample sizes – typically, no more than 25 or 30 subjects. This was partly due to carryover of focus group thinking, since online qualitative began with focus groups. But another factor was the intrinsic limitations of real-time (i.e., “chat” type) inquiry and response with large numbers of participants. The asynchronous (i.e., “bulletin board”) approach was new, and the technical aspects of the process – Internet hosting and data collection – were still at an early stage of evolution.

The somewhat unusual client category in this case – an academic institution – along with the need to ensure at least some degree of representation of all 14 population segments made it difficult to determine

an appropriate initial sample size. Too small an initial invitation list, coupled with an expectable number of non-responders and drop-outs, would compromise the validity of the eventual quantitative analysis, and perhaps also the crucial qualitative insights when broken down by segment. On the other hand, too large a starting list and/or an unexpectedly low number of non-responders and drop-outs not only would slow the study down and increase the cost, but also (even if we simply ignored the superfluous portion) might overtax the host’s server load capacity, bringing the enterprise to a standstill.

On this latter point, related issues included the fear of a sudden dramatic increase in demand on technical support; concern whether the software platform’s email broadcast facility could handle the number of confirmation/ reminder emails that might be necessary; concern about possibly exceeding storage capacity for data input for a single project; concern whether the increased use of bandwidth would affect any other, unrelated projects under way at the host company; and, not least, how best to set up the project to facilitate timely qualitative analysis of the transcript upon its completion.

Technical preparation

Because there had been very little practical experience with asynchronous qualitative research among “quant-sized” samples, the server hosting company decided on pre-testing to ensure they would be able to handle the unknown, but certainly much larger than usual, number of respondents that would be necessary for the study. After several trials with multiple testers logging on simultaneously, they determined that the software platform, server capacity, and bandwidth usage would, theoretically, accommodate up to 400 users at a time. Of course, a sample of that size would have been out of the question for an interactive online focus group – if only because of the extremely long load time required for the discussion frame, let alone the formidable analytical challenge. But since this project was to be conducted in individual interview mode, each

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participant would see only his or her own responses in addition to the test stimuli and the moderator's questions and follow-up probes. The only parties that would be affected by long load times were the moderator and client observers; they would see all the postings once they logged on.

It was further decided that broadcasts of confirmation and reminder emails be staggered in groups of no more than 75 at a time in order to optimize delivery and reduce the server load. Additional pre-testing was conducted to determine how much data could be entered, and several software programming adjustments were made to ensure that the data fields were sufficient for the potential number of respondents. Similarly, the transcript download facility was tested to ensure that up to 400 respondent comments for each of a likely number of questions could be stored effectively; and that the 14 constituent sample segments and any or all of their associated discussion threads could be downloaded separately ... all without encountering any technical obstacles.

Research procedure

Right at the start of the project, in building the invitation list, the moderator had to establish a code, or "handle," for each of the 14 sample segments (e.g., CGF= Current Full Time Graduate Student, CGP= Current Part Time Graduate Student, CUG= Current Undergrad, FLT=Faculty, STF=Administration, EMP=Employer, PRT=Parent of Undergrad, etc.), so that she could quickly identify any given respondent in the course of the discussion postings (thus facilitating targeted individual probing), and also so that the downloaded transcript could easily be "cut" by segment whenever the analysis so required.

An initial explanatory invitation was mass-emailed to 2000 potential participants. Positive responders subsequently were sent a confirmation email, including general procedural information and instructions. Two days before the beginning of the fieldwork, reminder emails were dispatched, including

user name and password for each recipient. As it turned out:

- 297 individuals (15%) replied to the initial invitation, expressing interest in participating;
- 237 individuals (12%) logged on at the appointed time;
- 197 individuals (10%) answered at least one question before dropping out;
- 142 individuals completed the task – representing 7% of the initial total, or 48% of those who originally expressed interest in participating.

Whether it was because of the respondents' relationship to the institution, or their interest in the interactive online research process, or some other reason, it should be noted that the completion rate of 7% of the first mass email pool, as well as nearly half of those initially interested, are markedly higher than would ordinarily be expected for a comparatively large-scale online, mail, or telephone survey. Moreover, these completion rates were achieved in spite of the fact that no incentives were offered, and also in spite of – or indeed, perhaps because of – the fact that the period of participation for everyone extended for three days, and substantive write-in comments (vs. pre-structured check-off questions) constituted by far the bulk of the exercise.

The basic questionnaire format was standard and straightforward: Respondents were shown the five positioning concepts in turn and asked to rate each on a 10-point "meaningfulness" scale and explain their rating. This was followed by three additional open-ended questions aimed at exploring each concept's effect on respondents' knowledge of and feelings about the school, and its believability in light of those factors. Finally they were asked to rank-order the five candidates according to their preference and explain the reasons for their ranking.

The ratings and rankings were included to provide quantitative back-up data. However the main focus of the study was on the open-ended questions. What was new and different about this undertaking was

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not the questions *per se*, which were of the tried-and-true sort that have been used by qualitative researchers for decades, but rather the large number of people who were surveyed and the uncommonly flexible and permissive “ground rules” for responding. Participants were told at the start that they would have three days to complete the task, and that they could start, stop, and resume at their own convenience. So too with responding to moderator probes – those asked of the total sample, collectively, as well as those addressed *ad hoc* to a particular respondent. Moreover, if a probe or posted question triggered any additional thoughts about an earlier-discussed concept or response, the respondent could enter these new comments at will.

If the moderator sensed that a respondent’s attentiveness was faltering, or that a response needed elaboration or clarification, she had the ability to email him/her directly to try to resolve the matter. Meanwhile, client representatives looking on could communicate with one another and post probe suggestions for the moderator, with all of their comments hidden from respondents.

The three-day test generated over 300 pages of transcripts. Because of the initial set-up, responses to any single question, or any combination of questions, could be identified at will, with all comments identified by segment – all of which greatly aided both the quality and the speed of analysis. In fact, the moderator was able to process and analyze the data – and bear in mind that nearly all of it was qualitative, drawn from responses to open-ended questions – in five days; and the entire project, from start of recruiting to delivery of the final report, was accomplished in less than a month.

THE OUTCOME

Analysis of the results indicated a strong preference for one of the test concepts, with only few and minor differences among the 14 constituent populations. In fact, this concept was ranked first in preference by 10 of the 14 segments, and second by two others. But

the quantitative results mainly served, as intended, to reinforce university officials’ already high comfort level with the qualitative findings. As reflected in many of the reported verbatims, these comprised a rich collection of perspectives and insights that not only helped further strengthen the winning concept but also provided valuable guidance for the development and subsequent evaluation of various strategic initiatives.

The brief sampling of verbatims, below, serve to illustrate the kind of qualitative informational contributions produced by study participants: “(Concept statement) is believable to me. (School) has been recognized consistently by US News and other local and national media. The professors have notable resumes and experience to share with the students. The environment does encourage and foster entrepreneurial ideas. It even provides support and additional seminars/functions for alumni.”
Undergraduate Alumnus

“I think (School) has worked hard to create and roll out an integrated management curriculum. I believe it is an effective method of teaching anything. (Rating of 9.) I would give it a 10 if I felt that the integrated management curriculum and the integrated liberal arts curriculum were more integrated with each other.”
Administrator

“(Rating of) 9 or 10. I have a tough time giving anything or anybody a 10 – nobody’s perfect. Anyway, practical experience, realities of the business world, empowerment are critical success factors to managing uncertainty. (School) embraces ambiguity and helps to integrate it into our lives so that we become more comfortable with it – thus making us more effective when faced with it in the rest of our life’s experiences.”
Current Full Time Graduate Student

“(Rating of) 6. This one is better. I still think that it should be ‘a’ leading business school, not ‘the’. This one seems to get closer to the school’s core mission of educating students. One comment (I have) is that ‘innovative,’ ‘agile’ and ‘resourceful’ all have somewhat

overlapping meanings. If you are going to use three words here, you might switch one to a word that broadens the reach of the statement.” MBA Alumnus

“(Concept) is not believable because I don’t think (School) can bring new perspectives to the challenges of students and professionals at any stage in their learning and development. This is a college that people work hard to get into. Not just anyone can succeed here. It makes it seem like a place where if you lay down the cash, you get the education – which is not true.” Current Undergraduate

And by way of illustrating the methodology’s amenability to targeted probing...

Respondent: *“(Rating of) 5. It’s a bit passive.”*

Moderator: *“Marie, what about this statement is passive?”*

Respondent: *“I didn’t like the word ‘enables.’ ‘Creates’ would be more active, like ‘creates an environment where ...’”*

Respondent: *“(Rating of) 7... Apart from that, the statement is still solid and plays toward the segment that (School) targets.”*

Moderator: *“Andrew, what segment is (School) targeting?”*

Respondent: *“Individuals with entrepreneurial ideas and values. Age, sex, life experience ... all do not matter. What (School) targets is the individual as an innovator and a risk-taker.”*

CONCLUDING STATEMENT ABOUT THE METHODOLOGY

The asynchronous online bulletin board methodology described here does not accommodate the group dynamics that can be accomplished with smaller samples. However, this was not a disadvantage for the purposes of this study. Group interaction can be very helpful in exploring market behavior and developing product or positioning concepts;

but evaluation and preference inherently imply personal choices, and so are more appropriately tested one-on-one. Moreover, as a practical matter, for this project, interaction among respondents was expressly precluded by design in order to facilitate conducting a large number of individual interviews simultaneously.

Thus, for its intended purpose, the only significant disadvantage of this methodology compared to conventional real-time in-person qualitative research is that, obviously, it does not allow for direct observation of respondents’ non-verbal behavior – e.g., facial expressions, hesitations, body language; nor, except by lucky chance, does it facilitate on-the-spot follow-up probes. Of course, the sacrifice of direct observation is a characteristic of all online research; and as for probes, when the moderator was not fortunate enough to catch a particular respondent’s comment at the moment of its submission, she came upon it later and could refer the respondent back to it as context for the probe.

From the client’s standpoint, perhaps the most salient advantages of this methodology were the savings in time and cost versus alternative approaches. In this connection, we should note that the five-day breakneck pace of project execution in this instance is not recommended as a standard parameter; it was dictated by an uncommonly aggressive client timeline. However, even at a more normal, comfortable pace, it is clear that the elapsed time required for this methodology is dramatically less than that required for any plausible alternative approach.

The cost advantage is equally if not even more dramatic. The total cost to the client was \$12,725, or just under \$90 per completed interview. About 20% of that total comprised the direct data collection costs – unusually low for a predominantly qualitative study. By comparison, conducting the project by telephone – and assuming the shortest interview likely to produce useful qualitative results (say, 15-20 minutes) – would have cost at least \$30,000, probably more.

And of course, conducting the research via individual in-person interviews – quite apart from the fact that geographical dispersion of much of the sample made this option infeasible – as a practical matter would have been cost-prohibitive.

Another important advantage of this method is the reduced pressure on respondents – both time pressure and peer pressure. Knowing that they had (in this case) three days to complete a relatively short and uncomplicated assignment, participants could choose the times when they were able to attend to it with least distraction. Moreover, they were encouraged to think as long as they wished about the concept stimuli and their reactions, and if their reflection gave rise to new or amended thoughts, to post them at any time. Respondents with poor keyboard skills were not nearly as disadvantaged by pressure to keep up as they would be in a real-time online group setting. And in addition to the comforting psychological distance and attendant sense of privacy afforded by the online setting, the absence of other, possibly judgmental or domineering individuals who would have been included in a group format further liberated participants in this study to express themselves freely.

As with all online research, geographical dispersion of the sample was not a problem; but beyond that, because of the asynchronous format over three days, different time zones were not an obstacle. Finally, although in this case one moderator was able to handle the entire project, for longer or more complex studies and/or (even) larger sample sizes, the asynchronous online individual interview format is amenable to multiple moderators.

Because research is only one of many factors involved in the development, execution, and implementation of an organization's strategy, it is always difficult to draw a direct cause-and-effect relationship between a particular study and success in the marketplace. Granted that correlation does not necessarily imply causation, but neither does it rule it

out. In this instance, what we can report is that in the two years following various strategic implementations of the winning positioning concept, the institution's recognition and rankings by major media (e.g., *U.S. News & World Report*, *Business Week*, *The Wall Street Journal*, *Financial Times*, *Princeton Review*, *Kiplinger Magazine*, etc.) showed measurable improvement along a broad array of dimensions, including those reflecting the objectives of the research.

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