The Amazing Evolution of Qualitative Research

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Did you know Alexander III of Macedon, better known to the world as Alexander the Great, was the creator of qualitative research? Legend has it that once Alexander’s soldiers conquered a territory, they would conduct a rudimentary form of ethnography to facilitate the blending of newly-conquered people with Greek customs and culture. Of course, the respondent selection process employed by Alexander’s men differed from today’s methods, but that’s a conversation for another time.

Fast forward to the late 1800s, and there is evidence that some scholars were conducting ethnographic and one-on-one, in-person interviews, and by the early 1900s, anthropologists had begun to gather first-hand data. From the 1930s to 1950s, there was a shift to the extensive use of quantitative research. Even though qualitative research was considered “soft,” focus groups were born, and by the 1960s there was a renewed interest in conducting qualitative research.

Since then, qualitative research has undergone changes that can only be described as transformative. I invite you to continue reading to learn where qualitative research has been, where it’s going and how integrating classic and breakthrough methodologies can create multiple information streams that deliver unified intelligence and richer insight on local and global levels. When correctly implemented, these new understandings will improve revenue, market share, profitability and long-term brand asset value.
Early Qualitative Meant Focus Groups to Many

For a number of years, conducting qualitative research meant “doing focus groups” to many people. Across the globe, respondents were recruited into focus group facilities. Clients were entertained in the back room by researchers who had a knack for understanding and interpreting the whys and wherefores behind the data. Some facilities installed exercise equipment and other recreational paraphernalia in viewing rooms. Many provided a selection of food and beverages that rivaled the fare offered at the finest restaurants in their respective cities. Attending groups was, after all, an important event that could draw the attention of anyone, including the CEO.

The notion that there were a variety of qualitative research methods never seemed to make it onto many people’s radar. Some researchers were conducting in-depth interviews, either in-person or by phone, and ethnographic research conducted in homes, offices and hospitals was considered the advanced method of the day.

Then, in the late 1990s, the world of qualitative research began to evolve more quickly. Some of the more progressive qualitative researchers were conducting focus groups by phone, in office conference rooms, stores, pubs, hotels, hospitals and more. In addition to videotaping, streaming video now enabled those purchasing the research to view its execution from their offices, then later from their laptop computers.

Soon after, online focus groups burst onto the scene. Clients were intrigued but cautious about “dipping their toe into the water” because, after all, the high visibility spelled R-I-S-K. In truth, the earliest platforms were somewhat clunky, and did not allow for the depth of probing achieved when conducting in-person focus groups.

The Beginning of the Online Evolution

With the creation of online bulletin boards, qualitative research could be conducted with geographically-dispersed individuals and those who just could not spare the time to participate at a qualitative facility. Online bulletin boards also provide the opportunity to post questions read by many people simultaneously, or conduct separate, private conversations with a particular person. The approach also lets participants spend hours pondering a question—perhaps even researching their response—before answering it.

Did online qualitative replace the traditional qualitative methods mentioned earlier? Certainly not, but the more creative qualitative researchers began to expand the use of mixed methodologies incorporating the likes of digital diaries before, during or after traditional qualitative sessions. Likewise, online bulletin boards became an excellent way to follow up with respondents who had participated in research using more classic qualitative methods.
Community panels came next, which fostered new ways of thinking in the research and consulting world as they began to blur the line between qual and quant. Among other things, community panels allow companies to quickly and continually listen to individuals who are, or were, passionate followers of their brand.

Continuous, Rapid Technological Advances

Listening

Great qualitative researchers not only know how to ask questions that elicit elongated responses, they have also perfected the art of listening. Today, listening is more than having an in-person phone or email “conversation.” It includes social media: web scraping and netnography are powerful tools used for collecting information (listening) in “real time.”

Observing Unobtrusively

While conducting traditional or classic qualitative methodological approaches such as focus groups and in-depth interviews, talented qualitative researchers observed and keenly understood body language, facial expressions, voice inflection and so much more. Today’s qualitative methods include such tools as mobile retinal scanning, covert photojournalistics, passive online metering, GPS tracking, point-of-sale eye tracking and point-of-sale video that let qualitative researchers study respondents’ movements and body language prior to inquiring about thoughts, feelings and “why.”

These innovative technologies exist because of advancements that were unimaginable several years ago. Who would have ever thought:

- A person’s portable telephone device could track their every movement, thereby eliminating the need for self-reporting (GPS tracking)?
- A camera the size of a postage stamp, fastened to a person’s shirt, could automatically capture an image every 30 seconds? And those very images could then be uploaded to a “cloud” for later viewing (with the respondent), for the purpose of understanding feelings, thoughts and observations at selected moments (covert photojournalistics)?
- A respondent could slip on modified eyewear to track retinal movement and capture images of precisely where a respondent’s eyes are focusing, so that the same type of conversation just described could occur (mobile retinal scanning)?
- With the respondent’s knowledge and consent, a device could be “installed” in a laptop or smartphone to passively meter the person’s web engagement and surfing habits—again eliminating the need for self-reporting—and provide data that could be verified and probed (passive online metering)?
- That footfall, recorded in retail environments, could enable qualitative researchers to interview respondents to uncover purchase motivations and reactions, facilitate an understanding of purchase barriers and improve shopper engagement and conversion?

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Qualitative Research: Jetsons’ Style!

We could stop right here and marvel at the advances made in the world of qualitative research, but there is so much more!

Smartphones, tablets and/or webcam-enabled laptops have provided another powerful gateway for qualitative researchers to peer into the lives and minds of respondents. Researchers assign “missions” to respondents, who record thoughts and feelings via asynchronous video streams onto their device of choice, which they then upload onto a specially-designed platform. This allows us to capture meaningful qualitative information anytime, anywhere. Respondents can provide important information while brushing their teeth or shaving or shopping or driving or eating—almost anything—over a series of days, weeks or even months. As respondents participate in longitudinal assignments, think of the enormous amount and depth of information to be gained.

Translations occur almost simultaneously, and transcripts are usually delivered within 24 hours, enabling a researcher to quickly begin identifying clips to either insert into reports and presentations, or use in the creation of a video documentary.

Exciting right? But a truly amazing aspect of this particular platform is that the researcher can highlight a desired quote and then instantly receive the footage of that particular verbatim. Depending on the type of deliverable and number of required clips, the time savings may be counted in hours, days or even weeks.

But Wait, There’s More

Journaling has also taken on a new format and meaning. Pen-and-paper journals, used as pre- and/or post-research assignments for decades, have been recreated in digital format for years now. Mobile devices have taken this to a new level, with journaling occurring around the clock in most places on the planet. Images and video footage can be uploaded onto specialized, user-friendly platforms, providing instant information to researchers and clients alike. Research consultants can then review what has been captured with the respondent to further understand motivations and behaviors.

One of the more advanced tools available to today’s qualitative researcher is online affective, moment-to-moment facial coding. This unique tool aids early stage advertising as respondents view storyboards and/or content from their camera-enabled laptop or tablet device, creating facial markers. As content is streamed, the web camera captures unconscious affective reactions (attention, liking) to map breakthrough, moment-to-moment interest and appeal. This is used to understand the likelihood of initial engagement and how to optimize messaging, persuasion and emotional response to ads. Qualitative consultants then probe respondents’ reactions for richer learning and to be absolutely certain about the reactions behind the output.
An update of an older technique, *galvanic skin response* enables the collection of subconscious emotional data through the use of a wireless, “wearable” biosensor that measures the respondent's emotional arousal via skin conductance, as the person is exposed to products, concepts, beta-test devices or concept boards. The premise is that electrodermal activity increases during excitement and decreases during boredom or relaxation. Again, experienced qualitative consultants will also probe deeply to gain a more comprehensive understanding of the harvested information.

*Online ethnographic interviews* are similar to a web conference between the qualitative researcher and respondent, with the researcher having the ability via desktop sharing to view sites being visited by the respondent. The methodology eliminates the obstacles of peer pressure, time constraints, geography and memory. Everything shared by the respondent (verbally and visually) is easily accessible for analysis.

*Online perception analysis* is another cutting-edge tool that enables moment-to-moment ratings for online video content using a tablet interface. With this approach, the respondent logs on to a particular website to view video footage and uses a “sliding” ratings bar to capture real-time reactions. Metrics of viewer perceptions are instantly available to researchers, superimposed over the stimuli.

**Psychodiagnostic Qual: Exploring and Discovering Underlying Motivations**

The evolution of qualitative research goes beyond technological innovation. For more than three decades, researchers in Europe have been conducting qualitative research predicated on the belief that people make decisions to fulfill unmet, underlying emotional needs. This approach is largely based on the psychoanalytic theories of Jung, Adler and Freud, and has been advanced by more contemporary work on needs and motivations from the US and elsewhere.

*Psychodiagnostic qualitative* seeks to understand the person, and uses the human being as the starting (focal) point in the research process, rather than the product, brand, package, message or category. Classifying how people feel/emote and viewing their underlying needs/positions in different situations, provides an understanding of the person “from the inside out.” It essentially captures fundamental, individual human needs as a baseline, rather than defining the person using the rules of the external world.

The psychodiagnostics approach is based on the premise that certain human cognition, emotion and behavior reveals itself consistently across the globe and is not subject to cultural, geographical, gender or linguistic bias. The goal is to understand what motivates human beings at their core to behave the way they do (i.e., underlying motivations/unmet needs prompt behavioral/purchase decisions to fulfill those needs).

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The methodological approach typically involves in-person extended mini groups or in-depth interviews in a comfortable, secure environment so respondents can share information about personal experiences and needs. Researchers use a series of special exercises to create this atmosphere. Throughout the session, a variety of projective techniques are used to gain access to information that respondents may not be able to articulate or may not be aware of. An intensive, extensive analysis process results in consultative insight regarding the roles that categories, brands, products, services, medication, etc., can fulfill in people’s lives.

Researchers get beyond what people say, describe, use, or prescribe to justify their logical response to questions by pursuing indirect questions and projectives. This works very well for category definition, portfolio planning/management, target market profiling, brand (re)positioning, innovation/white space development and communications/messaging since it provides information about how to motivate consumers to actively seek out a particular offering.

The approach is effective across categories as well—even those where it does not appear to be the case, such as financial services and pharmaceuticals. It’s worth noting that in the pharma/med tech space, psychodiagnostics has also led to better understanding of compliance/adherence issues, positioning new medications and understanding the slow uptake of a recently-launched drug.

Linking a psychodiagnostic approach within a qualitative customer experience study can yield a more holistic, dynamic view of the consumer experience and decision-making path, through a more robust understanding of how internal factors (underlying emotional needs) and external influences (media, word of mouth, technology, etc.) interact. This is accomplished with storytelling techniques to reconstruct the experiences and gain access to information that might have otherwise been inaccessible. The results include subjective “path to success” maps with deep dives into key areas of interest.

**It Takes More Than Technology and Methodology**

By now it’s clear that qualitative research has evolved dramatically, and there are a lot of cool, new ways to conduct it. While true, all of the approaches and techniques matter little unless they are linked to a thorough understanding of an organization’s business, marketing and research objectives. Those objectives provide the foundation for any qualitative endeavor. When overlaying the appropriate mixed-methodological approaches, the result is a more robust comprehension from a qualitative perspective and more confidence in understanding of the whys and wherefores. This supports the delivery of contextual and consultative insight, which drives confident business decisions.
Smart Deliverables Drive the Message Home

Technology, new thinking and innovation have not been limited to the conduct of research itself. The move to PowerPoint reports with embedded video clips in the late 1990s—a major step forward when compared with lengthy reports delivered in 10-point font Word documents—was soon overshadowed by the creation of video documentaries. Created by film makers and other talented individuals, these deliverables include voiceovers, subtitles and narration to quickly and easily capture the minds and hearts of stakeholders, both empowering them with information and delivering an enhanced desire to take immediate action.

Another way to generate ownership among stakeholders and senior management is to conduct post-research workshops. For years, many of the more sophisticated research consultants have embedded consultative insight in the form of half- or full-day sessions, leading to higher levels of stakeholder ownership, commitment, usage and socialization within the client organization. Today’s workshops become even more powerful with the integration of learning from netnography and/or web scraping accomplished within the ten days before the workshop.

Hang on to Your Discussion Guides!

As the world of qualitative research continues to leap forward, researchers should be thrilled with anticipation over what the future may hold. If the past 25 years are any indicator, the next quarter-century should be breathtaking!

Right now, what we are absolutely sure of is that consultative insight gleaned from multiple information streams allows the recipient to make more confident, informed and inspired business decisions than ever before. That is excellent news for brands and marketers. It is also something that Alexander the Great might have appreciated, if he were around today. And maybe, just maybe, now is the time future marketing research historians will remember as the pivotal point that catapulted admiration for the unequalled learning provided by qualitative research initiatives.

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