

Looking inside the Digi-Qual Toolbox

Tips and tricks to leverage the digital qualitative revolution

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Introduction

The speed at which business and marketing decisions are designed, implemented and measured is becoming increasingly fast, putting pressure on qualitative research projects to be completed in very short time-frames with pressure to reduce budgets. Time pressured participants are, in many cases, unable to travel to research facilities. In addition, client observer schedules can have competing demands. International research has unique challenges associated with geographically dispersed participants living in different time-zones and language barriers. As multi-lingual researchers attempt to bridge the gap, the lack of local language expertise results in communication barriers. With medical studies and other sensitive topics, there are greater demands for participant anonymity and confidentiality.

As a result, new digital qualitative methodologies have emerged to begin to address these and other challenges. Based on the ESOMAR Global Market Research 2018 industry report, 43% of qualitative research is conducted using online methodologies (i.e. online qualitative, mobile qualitative and online research communities) worldwideⁱ. The 12 Latin American countries that provided spend by research method indicated an average of 23% of qualitative research conducted online. The total spend on online methods worldwide is estimated to be 6% of total spend, or \$2,750 million USD. The 2018, the Q3 and Q4 Greenbook Report on Industry Trends (GRIT Report) reported that respondents see automation as the most significant game-changer in researchⁱⁱ. Webcam-based interviews and mobile ethnography continue to experience a high rate of year-on-year growth at 5% and 3% growth respectively, yet there remains a significant portion of the industry who have yet to adopt these methods. The following paper provides recommendations and best practices for those looking to adopt or expand their use of digital qualitative research and adopt automation of processes.

How is Digital Qualitative addressing research challenges?

Access to Time Pressured/Low Mobility Participants

Whereas in the past, participants had to be scheduled in advance to complete a study at a specific place and time, digital qualitative research allows people to join a study from almost anywhere and anytime. It is much easier to find time to participate in research if you do not have to account for additional travel, parking and waiting time. Participants with low mobility and other disabilities are more likely to be able to participate in online environments, since digital qualitative research can be done from any computer, or from mobile devices in most cases. This substantially increases the ability for research participants to participate in research and gives researchers the additional incentive of convenience when looking for willing respondents. Further, in many cases, because participants are in the comfort of their own homes and/or offices they tend to provide deeper insights and more robust responses. Asynchronous methods like online journals, discussion boards and online communities have an advantage, and having a study that runs over multiple days allows participants to log-in when it is most convenient for them.

For example, Fine Research conducted research amongst a respondent population with mobility restrictions due to pain, arthritis and cancer. The respondents' medical conditions made it challenging to travel to a traditional focus group facility. The research was conducted using itracks online discussion

board platform, achieving a level of participation that would have been virtually impossible using a traditional focus group methodology. In cases where real time engagements (like video interviews and focus groups, phone interviews, or real time text-based engagements) are required, digital research still offers users the convenience of completing the research in their own environment. For these types of studies, automation in scheduling is often offered giving research participants the flexibility to schedule themselves a time that suits them best. Auto-scheduling can also take away the hassle of scheduling for moderators or recruiters.

Management of Global Studies

Digital qualitative research also offers the moderator similar conveniences to those provided to the participant. The researcher does not need to travel to numerous places in order to complete the research in multiple markets. A research team can then focus on the content of the data, saving the time and money associated with travel. Global research can now be carried out across multiple time-zones and in a number of different languages, all within the same project. Multiple markets can be researched simultaneously in order to produce reports for the client in a shorter time-frame. Asynchronous methods in particular make time-zones and multilingual interactions easier. Some digital qualitative platforms have software interfaces, which can be customized to the local language of the participants. With these methods, consumers from all over the world can be asked the same questions and can engage in the same discussions.

Although real time digital research requires attendance at a specific time for an interview or focus group, participant time selection, calendar invites, participant management tools and automation makes the recruiting and management process easier for both participants and project managers. To accommodate language differences, there are a number of free online tools (e.g. Google translate automatically embedded in the Chrome browser) that can be utilized for clients and observers alike. Newer technologies also are beginning to offer automated translation for real time tools, like video interviews with varying degrees of effectiveness.

While some researchers feel they can rely on these tools, and they have gotten substantially better in the past 2 to 5 years, most researchers still rely on human translation where budgets make it possible. Researchers sometimes use trusted bilingual moderators who work with participants in certain required languages and then provide reports in the client's preferred language. In other cases, they arrange for the transcripts to be translated in order to create reports. There are also a number of automated offerings in the market that provide transcription of audio and video at a fraction of the cost of more traditional transcription methods. Machine transcription and translation are relatively new and seem to be getting better as the AI embedded in these technologies becomes more advanced. Challenges remain in terms of managing the transcription of poor quality audio recordings, strong accents and industry specific terminology. There is certainly more to come on the horizon regarding automation and machine learning.

Accelerated Data Collection and Reporting

Online qualitative research leverages automation technologies, which allow the researcher to execute all of the steps required to manage a project from a single software interface. By doing so, they are able to compress both time-frames and budgets. Projects can be set up and booked online within minutes. Users and questions can be efficiently uploaded, with a typical project set up time being 1 to 3 hours. Research participants can then be recruited immediately, as less notice is often required for online participation. Automated technology allows the research team and moderator to collect the project data quickly. Groups can be scheduled more efficiently than in the case of real time groups, as the moderator does not need to move between locations. Asynchronous methods allow for efficient interactions simultaneously with multiple participants and sub-groups.

For example, a few days before the Congress of the Brazilian Pharmaceutical Industry Union (Sindusfarma), Ipsos Health identified the opportunity to present a digital qualitative project to support innovation within the pharmaceutical industry. Fine Research and itracks partnered with Ipsos Health to complete the study, which was presented at the Congress. Within a week, the project team set up an online community of diabetic patients who participated in an online discussion. The team was able to effectively meet the study objectives and gather in-depth insights, despite the tight project deadline. The results were available for presentation at the Congress.

Text-based digital research offers the benefit of instantaneous transcription. Some technologies offer advanced filtering and analysis tools to support reporting. As we move forward, biometrics, text analysis tools and automated video analysis will further assist with efficient data analysis and reporting.

Leveraging the Benefits of Video

Within the last 10 years there has been a boom in the consumption of video online. At one time, only those with the fastest internet connections watched videos online and few people created their own content. We now live in an environment where the prevalence of social media is increasing consumers' comfort levels with sharing portions of their lives through pictures and videos. From a research perspective, this means that moderators are able to see beyond the words and see nuances not always stated directly through written text. The addition of video allows moderators to pick up additional cues via body language and facial expressions, as they would in face-to-face research. This can assist those researchers who are making the transition to online a bit easier. With the rapid adoption of mobile device usage, it also allows for more *in situ* responses. Things like in-home user tests and shop-a-long studies are more feasible, as researchers are no longer required to meet a participant in-person.

It also can, in some cases, create a more natural environment for the participant to interact in, as the researcher is not there in person making them act slightly differently. From a cross cultural perspective, this can be important as participants that would otherwise act differently with a person from a different background may be more willing to act more in accordance to how they would among peers. Finally, using video data gives the researcher the opportunity to see the participant "in the moment", and thus no longer relying on "recall".

Listening to the Introspective

In face-to-face groups, extroverts invariably stand out more in the discussions; they like to be heard. In this context, insights from introverted participants are unlikely to be obtained at the same level as extroverts. The online qualitative environments allow moderators to ask the group questions simultaneously and get answers from even the most introspective participants.

Client Engagement

Virtual backrooms available in online qualitative research offer the ability for client observers to interact with the moderator in real time, with safe guards in place that make it so these same observers cannot interact directly with participants. Client engagement can be increased significantly, allowing clients to be involved with everything from assistance in clarifying terms, giving real time feedback on customer questions and logistics, as well as identifying comments and themes where they would like further probing. In the context of communities, client observers can give feedback based on what the participants have said in order to make changes in the guidelines and/or activities for the next set of research questions.

Projects can then be built with customer immersion in mind. New methodologies deployed using the technology allow the client to experience the research and be in a better position to potentially act on the results. In a text-based online focus group completed with a UK-based energy company, nearly 1,000 employees observed customer focus groups, which facilitated empathy and increased motivation to implement research findings. As the research was conducted via an online chat facility, the client was able to offer key employees - who probably have never participated in research observation before - the ability to gain insights directly from their customers. Employees from sales, marketing, production and operations were all able to have immediate access to feedback directly from their customers.

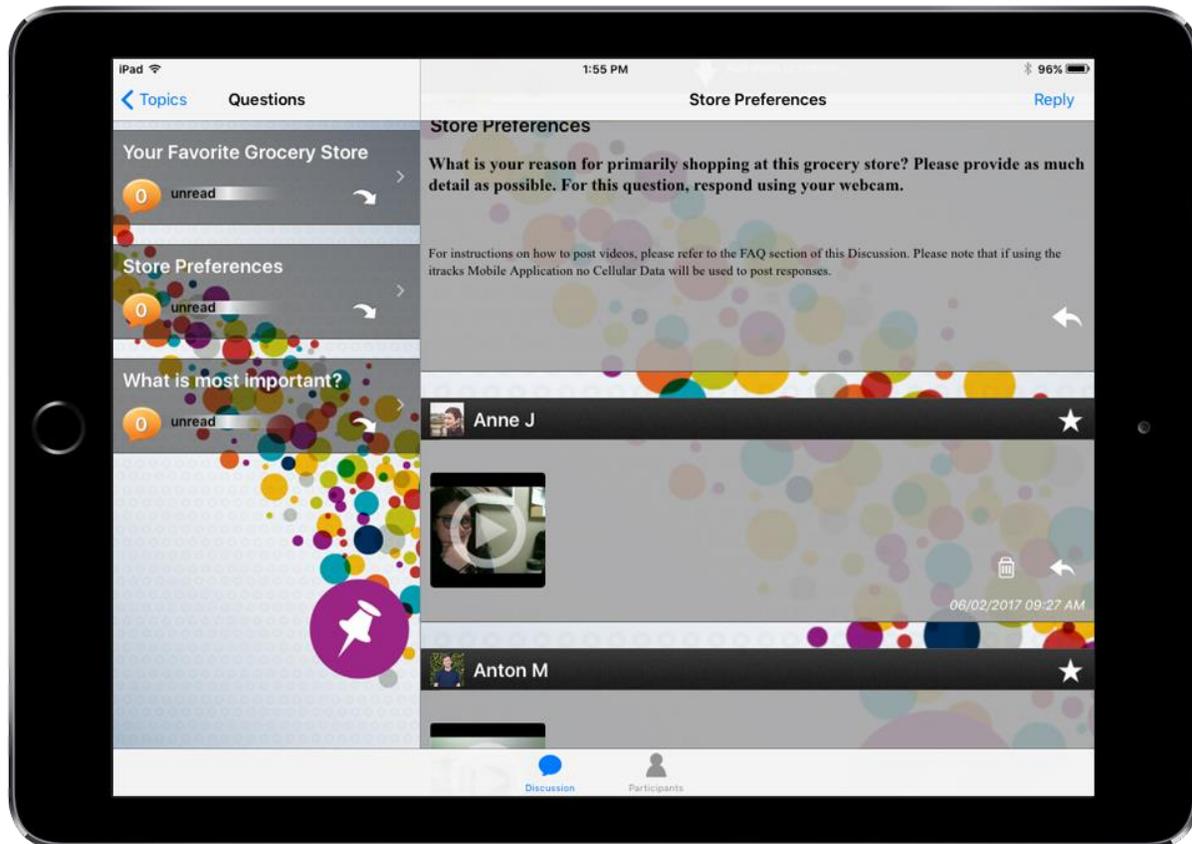
Opening the digital qualitative toolbox

Discussion Board/Community Platform

Online discussion boards and communities provide a platform for threaded discussions to take place on qualitative research topics (see Figure 1). Studies typically run over the course of 3 to 7 days, up to several months, or years. The communication is asynchronous, allowing participants to log in at their own convenience. Participants and moderators can view and comment on other participants' responses. Client observers can view the discussion and provide comments, which are only viewable by the moderator(s)

and other client observer(s). The method works well for studies with participants in multiple time-zones as well as studies requiring the recording of videos or images, such as in-home usage tests or shopping studies. Mobile apps may allow questions to be downloaded in advance to enable the posting of responses without internet access. Responses are then uploaded automatically, once the participant enters an area with WIFI access.

Figure 1 – Online Community Platform



Text-based Online Focus Groups

Text-based online focus groups typically include a whiteboard area where various types of media are shared (see Figure 2). The primary communication between participants and the moderator is text. Polling questions and other media markup activities can be included. This methodology is the most time efficient due to the majority of participants being able to read and type faster than people speak and/or listen. Participants can formulate responses simultaneously allowing the moderator to move through topics faster than video-based sessions. The method works well for sensitive topics due to the anonymous environment. It is the method of choice for participants with limited or inconsistent internet bandwidth.

Video-based Online Focus Groups / IDIs

Online focus groups and videos are conducted using real time streamed video (see Figure 3). Screen sharing, polling questions and other research activities can be included. The method is ideal for studies where real time interaction and observation of body language is important, such as product taste testing. A consistent high speed internet connection is required.

Figure 2 – Text-based Online Focus Group

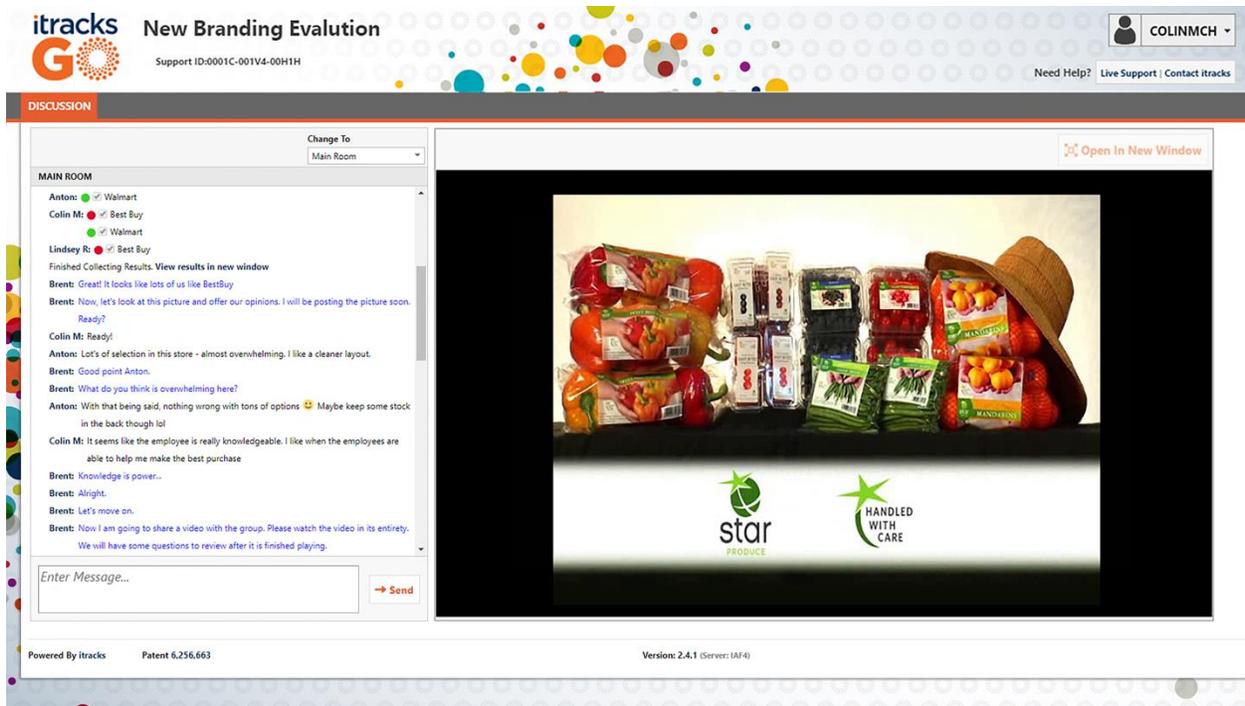
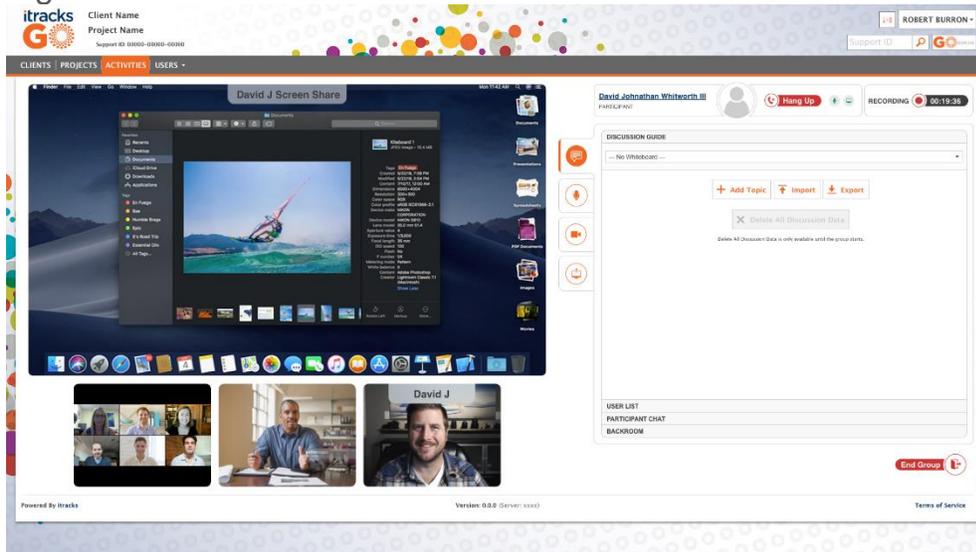


Figure 3 – Video-based Online IDI



Telephone-based IDIs with Screenshare

Telephone-based interviews are conducted with a simultaneous online media sharing platform (see Figure 4). Sessions are recorded and client observers can communicate with the moderator during the session using the online platform.

Figure 4 –Telephone-based IDIs with Screenshare

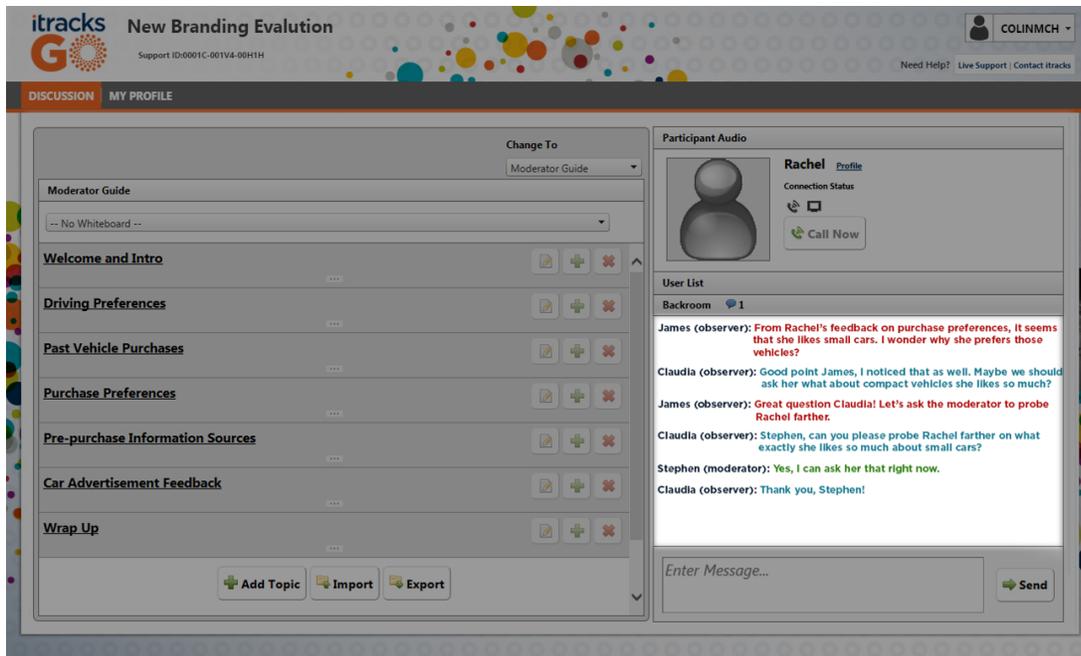


Table 1 - Digital Qualitative Methodology Comparison

	Phone IDI with Screenshare	Video IDI or Focus Group	Text-based Focus Group	Online Discussion Board/Community
Description	Telephone/VOIP interview with online media viewing/screen sharing.	Real time streamed video interaction with screen/media sharing.	Text-based communication with online media sharing.	Participants log in and participate at their convenience. Video and text posts.
Time-frame (per interview)	30 mins – 1 hr	30 mins – 2 hrs	1-2 hrs	As long as project dictates
No. Participants (per interview)	1	1 - 10	Typically 8-12. Some sessions have 100+.	Typically 15-20. Can be up to 1,000 with subgroups.
Discussion Type	Real time	Real time	Real time	Asynchronous
Report Output	<ul style="list-style-type: none"> Audio file Tagged audio clips Text transcript Highlight reels from audio files 	<ul style="list-style-type: none"> Video file Text transcript Tagged video clips Highlight reel Polling question data 	<ul style="list-style-type: none"> Transcript Polling question data 	<ul style="list-style-type: none"> Transcript with embedded videos Highlight reel Tagged video clips Polling question data
Backroom for Observers	Yes	Yes	Yes	Yes

<p style="text-align: center;">Use Applications</p>	<p>Studies with sensitive topics or anonymity requirements. Areas with limited/inconsistent internet bandwidth.</p>	<p>Body language and real time interaction required. Stable internet required with adequate bandwidth.</p>	<p>Studies with sensitive topics or anonymity requirements. Areas with limited/inconsistent internet bandwidth.</p>	<p>Mobile ethnography, in-home usage tests, shopping studies. Studies with participants in multiple time-zones/limited time schedules. Mobile apps may allow offline participation.</p>
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Avoiding challenges in online research

Table 1 provides a comparison of the various digital qualitative methodologies. Online qualitative research is growing rapidly and can replace face-to-face research in some cases, although it has limitations. Online research may limit the use of techniques that the moderator could use in conventional focus group rooms, reduce the ability of moderators to view body language, and there can be greater dispersion in the attention paid by participants. As users design digital qualitative methodologies, the following section provides some project considerations.

Technology Management

- **Internet Bandwidth:** How does the capacity of a user's internet connection impact performance and experience? Are geographical variances a factor? Is quality internet access a barrier? Typically, streamed VOIP will require 125-250kbps, and video streaming for online interviews and focus groups requires 525Kbps - 3Mbps depending on the platform, video resolution, number of users, content shared and screen sharing activities. Some platforms are able to detect users with limited bandwidth and switch them to audio-only communication until adequate bandwidth returns. Some video platforms have advanced functionality to manage common video issues and retain a smooth user experience. Text-based online focus groups are accommodating to inconsistent internet connections. Some mobile apps allow for questions to be downloaded in advance and posts to be stored so that internet connectivity can be inconsistent or nonexistent. Once the device returns to internet connectivity, the post and media will upload.
- **Compatibility:** Is the technology robust enough to work on different browsers and devices?
- **User Onboarding:** What is a user required to do in order to gain access to the technology? Are browser-plugins and/or app downloads required? Some businesses (especially financial and healthcare institutions) prevent users from downloading without system authorization.
- **Output:** After the research is complete, what is the deliverable? Are individual video feed recordings available, or is the output limited to a single file?

Audio Management

- **Audio Source:** Is audio being captured from a telephone line or voice over in internet protocol (VOIP)? For VOIP, is the user's connection able to support the increased and consistent bandwidth requirements? If not, the telephone may be a more consistent and stable option. In some markets, VOIP connections are more convenient for participants.
- **Telephone:** Are toll-free numbers being provided? Does the conference system have the ability to dial out to users in an effort to avoid distributing additional dial-in information?
- **Third-Party Apps:** Are third-party applications (i.e. WhatsApp) being used to establish the audio connection? Does the lack of integration with the research technology create more work when it comes to the post-research analysis?

User Management

- **Recruitment:** Is recruitment taking place online or via more traditional means (telephone, etc.)? How does the inherent speed and effectiveness of the selected approach impact project timelines and budgets?
- **Screening:** Is primary user screening taking place online (via survey) or over the phone? How efficient is the crossover from screening to registration, based on the selected screening methodology?
- **Registration:** What level of automation is in place to support the registration process? Is this process also actively providing additional layers of screening to ensure that users are equipped and ready to participate?
- **Scheduling:** How is user management and scheduling being approached? Are automated solutions in place, or is each component being managed manually?
- **Flexibility:** Are users being provided with the option of picking their own activity dates/times through an automated process? Or is user flexibility provided by managing the process via phone or email? Some project management systems offer integrated and automation features streamlining the user management process and eliminating the risk of human error.

Moderation Challenges

- **Balancing Participant Time Commitments:** For online discussion guides, less is more! Long and repetitive discussion guides can discourage participants. Focus on the activities on the core research objectives to keep the respondents engaged.
- **Dealing with Concise Answers:** In online groups, as in any other research type, concise answers can be a concern. In the virtual world, the moderator needs to stimulate the participants in order to obtain more in-depth answers, at the same time balancing the amount of probing to avoid overloading the participants.
- **Lack of Non-Verbal Communication:** In online research, the verbal language plays a key role in gathering insights. The moderator needs to deeply understand verbal language, which is the central element of the online discussion. The inclusion of creative exercises, encouraging participants to upload media and the use of video communication can facilitate the non-verbal communication, contributing to a better understanding of the study topic.
- **Inattentive Participants:** In the face-to-face group, the attention of the participants is totally focused on the subject being discussed. In the virtual environment, you cannot always guarantee total focus on the session as participants may be multi-tasking. In virtual real time sessions, the use of audio and visual media, as well as stimuli that attract participants' attention play an important role in keeping them focused. Streamed video during real time sessions can discourage participants from being distracted.
- **Establishing Trust:** One of the challenges of a moderator is knowing how to gain the confidence of each participant. One of the ways to achieve this is by emphasizing that the respondents are the experts in the subject. If respondents believe that their opinion is important and they have some degree of control, they will tend to contribute more.

Online discussion board model

Research Set-up

In discussion boards, questions can be programmed in advance and post times scheduled in order to show a certain number of questions a day. Estimates show that it takes about 3 minutes per question to get a 3 to 5 sentence response; therefore, typically 10 to 15 questions are set up to post each day, early in the morning. Questions remain posted so people can catch up and go back to the previous days' questions. The system allows for the researcher to determine when the participants see the questions, if the questions are required, the method of response (eg. video or text) and how people see each other's responses. A combination of question types can be set up, allowing for: a) participants to see each other's questions automatically (regular), as they would in any other online forum; b) not seeing each other's questions at all

(interview mode), so the participant is just communicating to the moderator; c) or a combination of both (uninfluenced mode), where participants see each other's responses, but only after they reply themselves.

Segmentation and profiles can also be set up in advance. Groups allowing the moderator to only ask specific questions of certain participants, or ensuring that participants only see responses from people within their sub-segment can be designed during user set-up. Profile questions to gather additional information as people come in can also be arranged. These profiles can, optionally, then be shown to other participants to increase engagement within the study, or just to have additional data to use and reference during the discussion.

Recruitment of Quality Participants

Recruitment in online communities is a fundamental part of any study and has specific characteristics for communities in Latin America. Recruitment for online research is typically carried out through three main ways: 1) from online panels; 2) via ad hoc recruitment (more traditional, standardized methods such as recruiters in the field, personally, telephone, or social media communications); and c) from client supplied lists. Fine Research has their own medical panel allowing them to efficiently recruit quality participants for digital qualitative studies within this demographic. The chosen method is based on the objectives of the given project and the characteristics of the target required.

When looking for participants for this type of online methodology, the requirements of the screener, as well as the personalities of the participants must be considered. As with traditional qualitative methods, participation within digital qualitative sessions is much deeper, more in-depth and more effective if people are articulate, expressive and comfortable sharing in group settings. In addition, for online research participants must be able to access the equipment needed for the study (e.g. computer or mobile device with adequate internet connections). These factors may influence the audiovisual materials shared during the study.

If a project has quotas to recruit within specific population segments and lower incidence/hard to reach respondent audience, recruiting participants can be a challenge. It is recommended to over-recruit by 15% to 30% to ensure that there are enough people and to account for the possibility of dropouts. For online discussion methodologies taking place over several days, there is an additional challenge to keep participants engaged and active throughout the study. The key to keeping quality respondents is setting expectations upfront in terms of how often they will be needed and what activities are expected of them. Additional instructions and support should be allotted to those groups of people, who may not be as comfortable within the digital/online space, in order to keep them engaged. Engagement can be influenced through effective moderation techniques, incentives and leaderboards within the software, showing posts by user. Finally, incentives are key in online research. Determining the "ask" of the participants and then applying an appropriate incentive - for the time invested and the participant type - can keep participants active.

Onboarding

In most cases, the first contact with the online software for the participants will be during the log in procedure. If they experience issues during the initial step of profile creation and login, it can cause frustration and the desire to abandon participation. To ensure success on your first project, test your onboarding process at least a couple of days before your research project goes live in order to understand the participant experience and proactively solve any potential problems that may arise. Bringing people into the digital qualitative platform directly from the online screening survey through integrated technologies makes the recruit-to-registration process seamless and reduces participant dropout rates. Participants that meet the screening criteria and agree to participate within the screening survey are directly routed to the digital qualitative platform registration area. Additional quality screening processes are often built into digital qualitative platforms to ensure participants are the demographic needed for the study and are a good fit for the project. At the same time, an introductory email will go out to them with the pertinent details on the research. This email can be customized depending on whether participants need to be approved, based

on their articulation and other screening requirements, or if they are automatically selected when they opt in and register for the discussion portion of the research.

Another consideration is how to handle participants who cannot begin the research on time. The delay in entering the platform and therefore the delay in the tasks required can have an impact on the study overall. People that start late may not be able to engage in conversations and tasks that are time dependent in an effective manner, and may rush to complete the research on time not giving as thorough answers as expected. During a study for the Canadian Physiotherapy Association the participants were members and did not receive incentives, therefore participation of as many members as possible was the project goal. In this case, the session was left open for an extended period of time for members to participate and led to increased member satisfaction for the study.

During any onboarding, participants should be made fully aware of their rights as a research participant and all matters of confidentiality and privacy should be pointed out. This is particularly important in those studies requesting photos and videos of participants (and sometimes their families or friends). Automated terms of use statements can appear for people to agree to when they enter the online study, but consent forms can be sent by mail to be signed and returned, or an application can be used where the signature is collected online from the participant. With the General Data Protection Regulations (GDPR), and other privacy regulations, it is important that the consent process and processes required to manage the PII meet the requirements applicable to the region where the participants are located.

Engagement

Achieving the commitment of participants with the online community is key to collecting valuable research insights. It is important to have active, continuous and quality participation from the research respondents. This engagement is most often achieved by choosing the right participants, but also by moderation actions within the study itself. It is important to respect the time requirements for study completion; researchers must stay as close as possible to the time of participation agreed at the time of recruitment. If participants are told that they need to partake for 30 minutes a day, the tasks should be adapted to the specified time to avoid participant burnout, and/or a negative predisposition towards the project. In addition to this, to increase motivation and engagement, tasks should be varied and as entertaining as possible. Furthermore, because of the research being pre-programmed, the activities should include clear instructions.

In turn, during the research, the moderator should actively participate within the study to emulate what is expected of participants. During internal research on online discussion boards/communities conducted on itracks software, it was discovered that moderators who engage (pro-)actively will generate 44% more inter-participant responses and participant-moderator responses than those who do little-to-no activity of their own. Moderators can actively be a part of their studies by responding early and often, probing effectively and notifying participants when they are logged into the research platform. Ideally, each participant should receive at least one moderator response with a notification per day in order to get them to respond and see the evolving conversation. Responses can be probes asking for follow ups to gain clarity, or even a quick note to acknowledge what they have said. Some online discussion board mobile apps have notification capabilities letting users know when someone has commented on their post, allowing them to enter the app and immediately engage in the discussion, similar to other social media platforms. Notifications can be sent to participants any time before, during and after the research study using email, text messages and/or phone. Some of these items are automated within the software itself and targeted towards people in the study already. Getting participants who have not joined the study yet may require the assistance of the recruitment team to follow up and assist with participant re-engagement.

Finally, it is very important to demonstrate to the participants that the information they can provide is very valuable. We must transmit to them that the community is a relaxed and safe environment for them to honestly express their opinions. The moderator oversees this through their own participation, as well as by monitoring the exchanges between participants throughout the study to ensure communications are

respectful. Some digital qualitative platforms allow comments to be made private, or removed by moderators at any time. For some participants, the most motivating part of engaging in research is the incentive. Apart from emotionally charged topics, or research that is deemed important for personal reasons, the incentive can be a major factor influencing the degree to which participants complete the study. Incentives will vary by project type and country, and may be geared towards the target participant group. The amount paid (and method of payment) should be communicated during the recruitment process and can be mentioned in order to re-engage with lapsed participants. It is also good to mention the payment method and incentive amount to participants as soon as they complete the study, and distribute the incentives as soon as possible after the study ends.

Moderation

There are some elements to consider regarding moderation in any environment. The moderator should be impartial and non-judgmental. The moderator needs to have a clear understanding of the research project objectives and deliverables. The moderator needs to have the skills to facilitate dynamic discussions, be able to stimulate participants, while at the same time trying to ensure that the discussion is on track. It is important that the moderator can follow the flow of conversation and maintain order. In some situations, respondents may not understand the purpose or relevance of a given question. In these situations, the moderator must be prepared to quickly rephrase a question, and this requires quick thinking. Moderators trained in doing more traditional research (such as face-to-face methods) can transfer the same skills to an online environment. Skills like generating a rapport, looking for cues to follow up on and being able to encourage participants to dig a bit deeper are all things that can be used in digital qualitative research projects as well. They may require some pre-planning and look a bit different than what you find using more traditional methods, but these small adjustments to what is usually done can have the same effects.

For example, in a face-to-face scenario (or even online video study), a moderator will usually greet the group, lay down some guidelines, complete logistical items (housekeeping) and then proceed to get participants to introduce themselves. The same would apply to any online discussion board research, except the moderator would include the study details and guidelines as part of their written discussion guide, which is loaded into the board. They would also create a discussion question where participants introduce themselves. The moderator would then in turn respond to the participants in the study, thanking them for sharing a bit about themselves. From there, warm up questions and activities would be put in place in order to garner participant rapport and prepare them for more challenging questions. Moderators can use video and images which will result in participants being more likely to share videos and images. Details can be added to a moderator profile, including a picture that best represents who you are to this community of users. Some moderators will add different pictures depending on their participant audience. As an example, one moderator might use a picture where they are making a “funny” face when doing research with children under 10 (and their parents), but she uses a very professional headshot when doing another research study with small business owners.

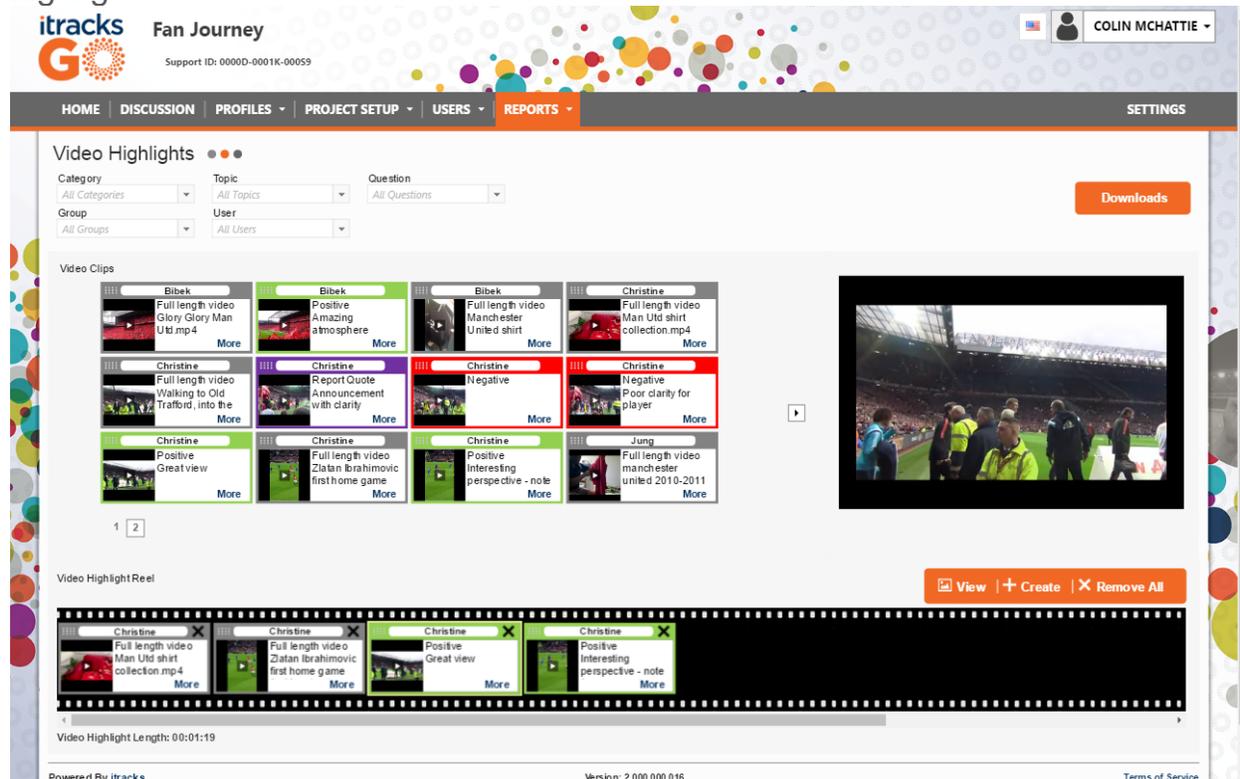
Analysis and Reporting

Discussion boards and online communities tend to create large transcripts because of how data is gathered. Unlike real time discussions that have people coming in at a set time, answering questions all at once or in turn, participants in discussion boards come in and respond when it is most convenient to them. As a result, responses tend to be longer, more in-depth and more thought out. Whereas you might only invite about 6 to 12 research respondents to a real time engagement, the numbers of participants in a discussion board is much higher, with 15 to 30 people typically coming in to respond.

Luckily transcripts in discussion board software can be filtered on the back-end and managed through a number of ways while the board is running. Transcripts are real time, allowing the moderator to, if needed, download the transcripts daily to get general themes that may be occurring in the research before the study ends. In the discussion area, they can make notations for the moderator’s transcripts only, at any time, in order to remind themselves to come back to a specific comment (or comments) and be able to filter these in the back end. If segmentation has been set up in the research study, participants segments can be

filtered allowing data from one set of participants to be seen in isolation from another set of participants. When working with video or audio, additional tools are available to create and categorize portions of video that can then be made into highlight reels for reports, within the software itself (see Figure 5).

Figure 5 - Digital Qualitative Video Reporting using tagged video clips to create highlight reels



How to introduce Digital Qualitative to your clients

Researchers that are introducing online qualitative methods to clients for the first time may want to quantify the cost-effectiveness and efficiency of doing the project online compared to traditional methods. Ideally a client's first experience is with a well-designed project, increasing the probability of quality results and a positive client experience. It may also help to identify studies that would only be possible in an online environment. Ideally an introductory project would be targeted at a population that has a strong preference for online environments (e.g. millennials).

Another approach is to consider introducing digital qualitative using a mixed methodology project where there are a mix of traditional groups and online groups. For example, an introductory project for the Canadian Physiotherapy Association included several face-to-face member engagements and 100 members that participated in one of five online discussion subgroups of participants from smaller centers, as well as rural and remote participants. Tamas Kiraly, Manager of Governance and Component Relations at the Canadian Physiotherapy Association stated:

*"The registration process and the interactions were safe and easy to work with; both the participants and consultants appreciated the flexibility of the platform and were very impressed with the "treasure trove" of ideas that the online discussions produced. The online discussions made a crucial contribution to the project success, providing a flexible and cost-effective tool to engage in an in-depth discussion with busy professionals from various locations."*ⁱⁱⁱ

Involvement of clients in the backroom during online qualitative studies may assist in building trust in the methodology and the research findings. For clients that have traditionally used face-to-face interviews and focus groups, the use of video during online studies may enhance confidence in the recruitment process and research methodology. Video IDI's and video focus groups have often been used as a first step in transitioning from traditional in-person research to online qualitative methods. Much like traditional paper surveys evolved to phone surveys, and then subsequently evolved again to online surveys, the same transition is taking place within qualitative research.

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