



QRCA

IDEAS & TOOLS
FOR QUALITATIVE RESEARCH

VIEWS

SUMMER 2007
VOLUME 5 • NUMBER 4

Intimate Strangers...

Making the Connection
with Respondents

Online Journaling:
Getting a Jumpstart
on the Qualitative Study

Seven Major Pitfalls
in Concept Development

Legal Issues in Using
Recordings & Photographs
in Qualitative Research



...have you ever wanted to get to know your...
...session and get a jumpstart on the learnings. As noted, we listed the pros and disadvantages of each.
...to prepare ourselves for a qualitative session by...
Based on the responses following the shopping exercise, we identified themes that adequately addressed our needs. We then used an online journal, a select group of participants was invited to participate in certain outcomes and predict what they would say in an interview. This gave our client the ability to get a better understanding of the "online journaling" process. We then selected the most-desired respondents and after conducting interviews with participants before the online journaling session, we proceeded accordingly. Following the interviews, we again used the online journaling tool to gather deeper and more relevant insights. We used qualitative follow-up to gain additional information from a handful of participants' "online journals" and to track changes over time. After participants had more time to explore the product, we used the website to analyze their experience and to come to explore the product. Ultimately, the online journal, in conjunction with the interviews, was a valuable tool. It was a relatively sufficient. In most cases, it provided a greater amount of information from participants over the course of the journaling process. It also captured category experience and current needs. This also offers additional insights that can occur with in-depth interviews and product. In addition, we learned that the online journaling tool can be used electronically and can be viewed at both retailers prior to the in-store session. This enables the moderator and client to focus on the areas that were of interest during the journaling period. And, unlike other qualitative tools, we knew that the participant had a better understanding of the product. We spent more time talking about what we learned from our retailer could improve. We were able to focus on the areas that were relevant to the client's needs. This qualitative session ultimately provided our client with richer, more in-depth



Online Journaling: Getting a Jumpstart on the Qualitative Study

BY CHERYL HALVERSON

Gongos Research ■ Auburn Hills, MI ■
chalverson@gongos.com

AND JENNIFER KLUCE

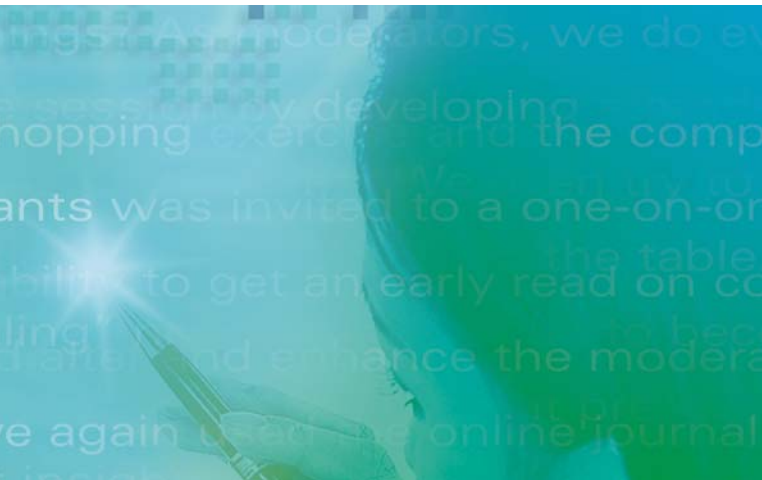
Gongos Research ■ Auburn Hills, MI ■
jkluce@gongos.com

Have you ever wanted to get to know your participants prior to your qualitative session and get a jumpstart on the learnings? As moderators, we do everything we can to prepare ourselves for a qualitative session by developing a moderator's guide that adequately addresses the client's objectives. We even try to anticipate certain outcomes and predict what participants may bring to the table. A flexible, innovative platform called "online journaling" not only allows us to become familiar with participants before we meet them face-to-face, but it also presents an opportunity to gather richer and more relevant insights.

What Are Online Journals?

From a big-picture perspective, "online journals" are hosted over the internet and allow participants to log in to a website to answer scripted questions over a period of time. While the length of time varies depending on the scope of the study, one to two weeks is generally sufficient. In most cases, participants are asked to visit the website multiple times over the course of the journaling period so that longitudinal learnings can be captured. This also offers added flexibility for the participant, lowering the risk of fatigue that can occur with in-depth, point-in-time surveys.

Responses are recorded electronically and can be viewed via an internal online reporting system. This enables the moderator and client to view responses at any time during the online journaling period. And, unlike quantitative surveys, online journals offer true flexibility in posting new or follow-up questions during the online journaling exercise. With the right technology, you may request that participants post photos or scan in favorite advertisements or other visuals.



As a follow-up to the actual qualitative session, you can even ask participants to complete online journal questions to clarify responses from the qualitative session or to obtain additional consumer feedback after they have left the group.

Online journals are a valuable tool that can help capture insights in a variety of situations. Here are five primary advantages:

- **Online journals capture and track behavior over a period of time**, such as the shopping and purchase process of a high-involvement item. Online journals allow us to capture every step of the purchase process, from the time consumers begin to think about purchasing the product to the time they acquire it. We can accurately gather information on all phases of the purchase process, such as internet research conducted, Sunday inserts used, word-of-mouth that influenced their choice and retailers shopped.
- **They assist in recall of consumption and usage**, such as examination of usage behavior of a personal-care product or consumption habits of a food item. For products and services that are frequently used or consumed, participants may not recall their exact behavior each time they use or consume the product. Online journals help gather these insights accurately and as they occur in real-time.
- **They garner immediate feedback following an event**, such as a shopping experience, consumption or usage experience. For example, participants might be asked to shop a specific retailer and then immediately document their shopping experience in the online journal.
- **They explore topics that would not be covered in the actual qualitative session** due to time constraints, such as secondary objectives or “nice to know” questions.
- **They gain preliminary insights into the research objectives to enable more effective probing.** Without overly exposing the research objective, you can begin

to gain an understanding of the consumer’s mindset relative to a product, category or usage habits surrounding a product or service.

Consider the Following Scenario

A major retailer sought to complete a concept evaluation, as well as a category exploration.

In order to get an unbiased opinion prior to the in-store shopping exercise, participants began the online journal by revealing their previous experience with the category and product, as well as their current store and related service needs, prior to being given their shopping assignment.

As part of the journaling exercise, participants were then required to shop and purchase the product at our client’s store and at one other competitive store of their choice. Throughout the shopping process, participants were asked to log in to the online journal, where they were prompted to record their shopping experiences and product evaluation. Participants were asked to make comparisons between the two stores so we could gain an understanding of the competitive advantages and disadvantages of each.

Based on the responses following the shopping exercise and the completion of the online journal, a select group of participants was invited to a one-on-one, in-store interview. This gave our moderator the ability to get an early read on consumers, select the most-desired respondents and alter and enhance the moderator’s guide accordingly. Following the interviews, we again used the online journal for post-qualitative follow-up to gain additional information, particularly on behavior or attitudinal changes after participants had more time to think about their shopping experience and more time to explore the product.

Ultimately, this online journal, in conjunction with the qualitative sessions, allowed us to uncover a greater amount of information from our participants. Since we understood their past category experience and current needs, during the qualitative sessions we were able to dig deeper to discover areas of opportunity with respect to merchandising and product. In addition, we learned about participants’ current shopping experience at both retailers prior to the in-store interview, which allowed the moderator to focus on the areas that were of interest for each participant.

For example, if we knew that the participant had a better experience at the competitive store, we spent more time talking about what made that retailer better

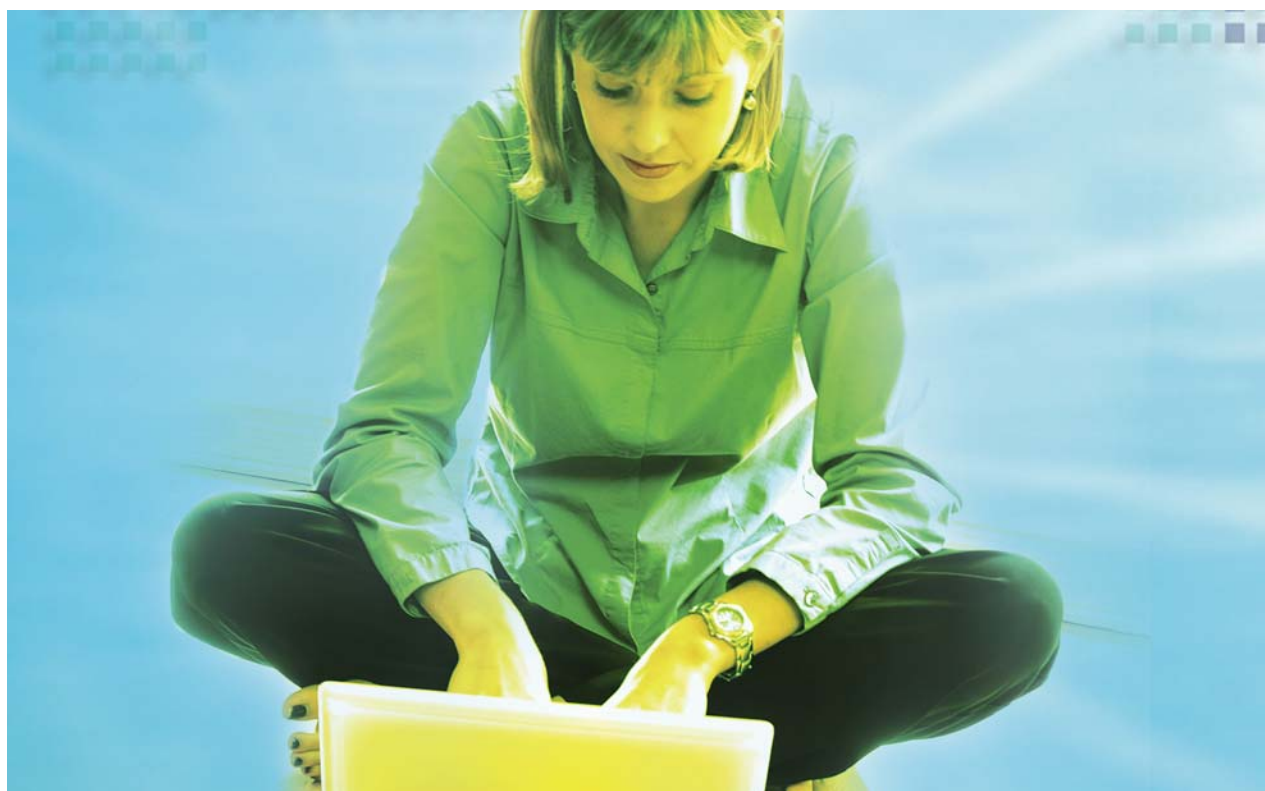
Online journals allow us to capture every step of the purchase process, from the time consumers begin to think about purchasing the product to the time they acquire it.

and how our retailer could improve. We were able to jumpstart the discussion by focusing on the areas that were relevant to this participant, and we ultimately provided our client with richer, more in-depth insights.

Advantages to Clients

Online journals not only help guide the direction and process of the moderating, but they offer tremendous advantages to *clients*.

- **They place consumers in the right mindset even before groups begin.** While we typically don't reveal much about the specific study objective in the online journal, we do get participants thinking in terms of the qualitative topics ahead of time. Because they have already pondered questions related to the category for at least one week, they are more open and prepared to talk about the topic at the onset of the qualitative session. Upon arrival to the qualitative session, participants tend to feel more at ease about discussing the topics.
- **They capture real-time insights about consumer behavior.** During the in-person session, there is a limit to how much a respondent may recall about a previous behavior. Online journals predetermine this behavior. True recollections are especially beneficial when consumers are asked to log their usage of a product. We once asked consumers to log their consumption of a food product over a two-week period. In addition to the time of day and the amount consumed, we learned about what else they were eating and drinking at the time, where they were and what they were doing. That way, during the focus group, there was no guesswork.
- **They offer longitudinal learning over a period of time.** Instead of having the standard two-hour face time to discuss the topic at hand, online journals enable researchers to examine a respondent's behavior and habits over several weeks or possibly longer. Recently, we asked users of a particular electronic item to track their usage and behavior over an extended period of time. Capturing their usage over time gave us a true examination of their needs and usage much more accurately than if they had simply recalled their behavior during the single qualitative session.
- **They provide richer insights.** An online journal can help researchers tell the story and paint an even more vivid picture of the participant's world. As we mentioned earlier, through not only participant's answers to online journal questions, but also through shared photos and articles, we are able to achieve a more in-depth look at the participant's life (beyond a single qualitative interview). During an online journal, we asked participants to shop competitive stores and send photos to document their experience, such as points of inspiration, frustration, likes and dislikes. They also sent us Sunday inserts and other advertisements to explain area of influence and points of interest.





Advantages to Researchers

There are also several key benefits that will enhance the process specifically for the *researcher*.

- **Online journals increase participant show rates.** Since consumers have already spent one to two weeks engaging in the online journal, they have begun to take a vested interest in the research study. Consequently, they are much more likely to attend the in-person qualitative session. In fact, during a recent in-store interview project that included online journaling, participants consistently showed up thirty to forty minutes before their scheduled interview time!
- **They weed out the weak communicators.** Assessing a participant's ability to articulate insights prior to the group is beneficial for the moderator. As researchers, we want participants who are open and can articulate their thoughts and opinions. Online journals offer moderators the opportunity to weed out those participants who seem particularly weak. If participants' responses are limited or they aren't making a concerted effort to complete the online journal, then they are likely not to be forthcoming participants during the actual in-person qualitative session.
- **They allow for more efficient and targeted moderating.** Some of the questions in the online journal should be questions you will touch on in the moderator's guide. This allows moderators the ability to get an early read on consumers and thus adjust their moderator's guide accordingly, resulting in more effective, deeper probing. When conducting a category-exploration study to identify new product ideas, we have participants enter their frustrations and excitors of current offerings in the online journal. This allows us to more efficiently investigate these innovation opportunities during the actual qualitative session.

Points of Consideration

The following factors need to be taken into consideration when deciding whether to integrate online journals into your study.

- **You may need to pay higher incentives.** Online journals require more work and commitment from the

participants, so a larger incentive may be needed to establish and maintain strong participation.

- **Online journals require more upfront work and preparation for the moderator.** In addition to designing the moderator's guide, moderators need to design the online journal questioning and ensure that both the language and the flow are properly programmed. Once the online journal has begun, moderators need to monitor the responses to ensure that research objectives are being answered and to determine if follow-up or additional questions are necessary.
- **Moderators must closely monitor respondents' participation.** Given the level of commitment needed by participants to complete the online journals and qualitative session, it is important to monitor participants' involvement in the journaling. At times, some participants might need some encouragement to get started, but typically once they begin (and see how simple it is), they complete the online journal in a timely manner.
- **Moderators must add more review prep time.** Prior to each qualitative session, the moderator should allow adequate time to review the online journal responses so that the in-person interview can be appropriately targeted to the group or individual. Ultimately this will not only add to efficiency during the process but also to more relevant probing. This is one such time for the moderator to do his or her own homework! Additionally, this allows the client the opportunity to get a glimpse into the mindset of the consumer, which can be particularly useful prior to exercises such as shop-alongs. When used in a briefing document, the clients will feel that they have come to "know" the respondent prior to the research.

Final Thoughts

As researchers, the bottom line always comes down to how effective we are in offering more impactful conclusions and recommendations to our clients. Online journaling adds a dimension to the qualitative research process that can lay the groundwork for you before you even meet the participants in person. They not only jumpstart qualitative learnings and enable more efficient and effective moderating, but when used appropriately, they can also ultimately lead to richer and deeper results.

This is one such application where a little bit of old-fashioned homework combined with advances in technology can really make the difference in your next project! 📧

During a recent in-store interview project that included online journaling, participants consistently showed up thirty to forty minutes before their scheduled interview time.