

How Not to Use Qualitative Research

The biggest danger of focus groups or one-on-one interviews is when a researcher feels that these techniques are all he or she needs to get a complete picture of the research target population. The clarity and conviction of an interviewee may be convincing evidence that the same opinions apply

This is a very dangerous assumption.

Here's why:

- In the close, dynamic and interactive environment of an interview or focus group, a moderator has much more time and leeway to make sure a respondent understands a specific concept. Everyone in this environment exposed to a new product or service will eventually "get it".
- Very rarely in the real world, will another person have that kind of exposure to a product, brand, or concept.
- Therefore, results obtained in a qualitative fashion—while insightful—cannot be trusted without further quantitative testing.

How Qualitative and Quantitative Research Should Work Together

The ideal research should always have qualitative and quantitative research working together in concert. There are three reasons why:

Focus Group Failure: Qualitative Research is Not the Final Word

A pharmaceutical company tested an over-the-counter product concept through focus groups. The enthusiastic respondents confirmed that they not only understood the ideas behind the product, but that they were able to articulate why they wanted it. It seemed like a formula for a successful launch.

As a final precautionary measure, the concept was run through quantitative testing. That's when everything went wrong. The product, and the main selling idea, produced very poor results—indicative of a major failure if the product launch moved forward.

The problem was that while respondents were able to grasp the value of the concept when being coached by a moderator, when left alone with the product's marketing materials they weren't absorbing the information and had no interest in purchasing the product. After dramatically simplifying and clarifying all communications materials, the company once again had a winner on their hands. The quantitative testing now signaled a strong product—a product that went on to a very successful launch¹⁰.

Had the company relied on qualitative testing alone, this would not have been the case.

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- Quantitative studies better replicate the exposure a prospect will have to a product or concept in the real world, and the results are much more scientifically accurate and valid.
- Qualitative research provides the insight to define new ideas that can be further verified by quantitative research, and it can provide inspiration into problems identified by quantitative research.
- Very different results can be obtained when comparing a quantitative study, such as an online survey, to a qualitative session, such as an interview or focus group.

This is why both need to work together to provide real intelligence and actionable information.

Three Approaches to Success

Three ways that qualitative and quantitative can (and should) work together are¹¹:

- **Customer Research**—Use focus groups and/or one-on-one interviews to determine internal needs, customer requirements and to gain management buy-in to the research project. Then use survey-based research to test hypotheses.
- **Employee Research**—Deploy surveys (online surveys being the most effective and efficient) to learn the issues that impact employee satisfaction the most. Then use focus groups to drill down into discovered issues within particular affected groups.
- **Concept Testing**—Use consumer focus groups to help revise and validate key attributes, uses of the product, uniqueness and appeal, then revise copy points and validate the final offer. The adjusted product can then be tested on a large scale through a quantitative method.

Comprehensive Approach Delivers an Edge Over the Competition: Medicare HMO

A Medicare HMO saw a competitor strategically cut their benefits and lose enrollments as a result—after performing market research. This organization was not about to make the same mistake. Rather than taking a myopic approach to their research, a combination of both qualitative and quantitative research was applied.

A series of small qualitative group discussions were conducted to determine the appropriate questions that would later go on a quantitative study. The qualitative research also enabled the refinement of incentive offers for participating in the planned survey.

The following stage was a stratified random sample survey that exceeded a 40% response rate. After the survey, the HMO was clearly able to identify which benefits were good candidates for reduction, and which benefits needed to be protected. The result was that the **HMO was able to reduce costs while still maintaining a solid enrollment rate**¹².

Why Expert Help is Critical

It takes an expert to balance qualitative and quantitative research, and to develop a plan that uses both to maximum effect. That's why only a research vendor with expertise in both research methodologies can deliver true, complete results that a business can trust. And it must be a vendor who can provide these services from one source.

Relying on different vendors to control different aspects of a research project creates three problems¹³:

- There is a loss of continuity as the project moves from one stage to another, which can cloud the keen insights essential to success.
- There are many points of contact for the client to manage, resulting in additional strain and the potential for error.
- If multiple vendors are dealing with segmented aspects of the project, no one will have the overhead view of the issues at hand, and key perspective can be lost.

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Why Only a Vendor With Comprehensive Expertise Will Do

When a research vendor is comfortable in utilizing both qualitative research, such as focus groups and one-on-one interviews, and quantitative research, such as survey methods, what results is an organization that can:

- Really invest the effort and time to learn a client's business.
- Provide the client with all the support they need from one source.
- Truly understand the research goals of the project, including the hidden benefits that the client may not even be aware of.
- Handle the entire project, from focus groups and qualitative research, to survey design, execution and results tabulation, to revealing analysis and rewarding revelations.

That's when marketing research becomes clearly valuable, and provides that competitive intelligence that every organization is searching for.

Note: For more strategies and advice on selecting a marketing research vendor, be sure to visit <http://www.infosurv.com/buyers-guide.html>.

How You Can Win With Qualitative Research

To fully integrate qualitative research into your project, while minimizing the cost and gaining the best possible visibility and insight from the results, follow these steps:

1. Clearly plan and prioritize research goals.
2. Select a research vendor who is experienced in all areas needed.
3. Review the vendor's plan to ensure qualitative methods have identified research issues clearly before beginning quantitative research.
4. Be sure survey research is well-designed, engaging and cost effective.
5. If new issues arise out of the quantitative research, dig deeper with a focus group or in-person interview.
6. Make sure the final analysis uses the proper balance of methodologies.

Following this path can keep your research focused, on track, and transform it into the crystal ball you need to guide your critical business decisions. For help on creating a unified platform of research methodologies for your next project, contact an Infosurv research consultant today. And be sure to read our other informative papers in the Infosurv Insider series.

The New York City Transit Department Doesn't Make a Move Without Integrated Research

New York City Transit needed to replace its aging fleet of subway cars, and they wanted to remove the barriers to increasing their ridership. But several challenges lay in their path:

- The organization needed to impress over 3 million passengers who use the system each day.
- Each individual subway car cost over \$2 million.
- At the beginning of the research, the system took in \$3.1 billion annually, but also spent \$3.1 billion.
- This meant that the research budget was tight, and they needed to get it right the first time.

New York City Transit deployed a range of studies to tackle the problem, including:

- Participant walk-throughs of prototype cars, followed by focus groups
- An ongoing transportation panel, involving a cross-section of 3000 NYC adults
- In-depth interviews of the panel respondents each quarter.

The studies showed that even though crime in the city had dropped by nearly 50%, there was still a perception of a lack of security in the subway system. This included quality of life issues within the subway system that detract from a sense of control and order. These revelations did not come from one study alone. It was the combination of results that painted the complete picture.

New York City Transit took many steps to improve the subway riding experience and increase the passenger comfort level with the environment around them. The organization also relied on rider input when designing the interior of the new subway cars.

The result was money well spent. The improvement program was so successful that the diverse department heads of NYCT now turn consistently to the marketing research department when facing a key decision. This is an unprecedented trend within the organization¹⁴.

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Bibliography

1 For a detailed definition and explanation of quantitative (also known as conclusive or descriptive) research, review the Infosurv paper titled: "Survey Research Design".

2 For a detailed definition and explanation of qualitative (also known as exploratory) research, review the Infosurv paper titled: "Survey Research Design".

3 Based on Joseph Rydholm, "Seeking the Right Mix," Quirk's Marketing Research Review, (November 2001), <http://www.quirks.com/>.

4 Example provided by J.D. Woods, Infosurv Senior Research Consultant

5 Concepts presented here based on work created by Dr. Naresh K. Malhotra, Dr. Mark Peterson, Basic Marketing Research: A Decision-Making Approach: 150.

6 Concepts presented here based on work created by Dr. Naresh K. Malhotra, Dr. Mark Peterson, Basic Marketing Research: A Decision-Making Approach: 152-154.

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8 Concepts presented here based on work created by Dr. Naresh K. Malhotra, Dr. Mark Peterson, Basic Marketing Research: A Decision-Making Approach: 163.

9 Based on Ernest Potischman, "Short Attention Span Theatre: Why consumers don't understand your concept even though it passed qualitative testing with flying colors," Quirk's Marketing Research Review, (December 1997), <http://www.quirks.com/>.

10 Based on Ernest Potischman, "Short Attention Span Theatre: Why consumers don't understand your concept even though it passed qualitative testing with flying colors," Quirk's Marketing Research Review, (December 1997), <http://www.quirks.com/>. Company name withheld to protect confidentiality.

11 Based on information provided by J.D. Woods, Infosurv Senior Research Consultant

12 Based on Wayne Howard, "Linking health care research methodologies," Quirk's Marketing Research Review, (June 2000), <http://www.quirks.com/>. Company name withheld to protect confidentiality.

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Jared Heyman

Jared Heyman is the founder and president of Infosurv, a full-service market research firm specializing in design, administration, and analysis of online and telephone employee, customer, and other market research studies. He leverages years of marketing research expertise to build for his clients the high-value, actionable intelligence they are searching for to facilitate the success of their strategic-level decisions.

Jared Heyman is the one companies listen to when they are planning their own marketing initiatives. He is quoted as a marketing research industry expert in everything from trade publications such as Quirks and Marketing News, to marketing research blogs such as Web Analytics World, to major media outlets such as the Chicago Tribune. Marketing professionals often rely on Jared Heyman's keen insights into the marketing research industry.

Jared Heyman is a fourth-generation entrepreneur, with a lineage of successful start-up companies contained within the family scrapbook. Heyman administered his first market research survey while at Collective Technologies in 1998. It was this experience that made him realize that there was definitely room for improvement in the marketing research arena. Jared Heyman left Collective to launch Infosurv just months later.

With an initial startup cost of less than \$3K, Infosurv has since experienced exponential growth over the past nine years. Infosurv currently has a client base of over 200, including dozens of Fortune 500 and major government agencies, and continues to specialize in market research, customer surveys, employee surveys, and online surveys.

Jared Heyman graduated from the University of Texas at Austin with a BBA, double majoring in Business and Marketing Research. He also has an extensive international profile, with cultural experience in Greece, Turkey, Spain and Southeast Asia.

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Find Out More

This paper is part of the *Infosurv Insider* series, an educational and informational series established by Infosurv to help demystify modern market research.

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