

## Balancing Research with the Qualitative Equation:

### Why Integrating Qualitative Studies into Your Marketing Research Strategy Will Deliver Maximum Business Intelligence

#### CONTRIBUTING EDITOR

Jared Heyman, Founder and President of Infosurv

#### YOU WILL LEARN

- Four reasons why qualitative study will help you get the most value from your research initiative.
- The six steps to successfully conducting a focus group.
- The best ways to use—and not use—qualitative research.
- How qualitative and quantitative research should work together to deliver the best possible visibility for your organization.
- Three approaches to successfully link qualitative and quantitative research together.
- Six steps to using the right research vendor to gain the full-service approach.
- How robust organizations such as Hamilton Beech and the N.Y. City Subway System protected their growth strategies with a combined research methodology.

#### Executive Summary

In this age of targeted online surveys and scientifically precise analysis, you may think that the usefulness of tried and true techniques such as the ubiquitous focus group has passed. **Think again.** Qualitative research such as focus groups and personal one-on-one interviews add the unique insight to survey research and quantitative analysis to turn data into real knowledge, and to provide perspective to raw results. The key is to build a comprehensive approach into your research methodology that takes all variables— and all opinions—into account.

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## Qualitative Research Still Maximizes Results

Through advances in online technologies, quantitative<sup>1</sup> research is more accurate, and more valid, than ever before. The success of online surveys is driving a trend for companies to rely solely on quantitative research to give them the business information they need, with traditional focus groups and in person interviews considered a quaint method of the past. But this can give a business only half of the picture.

In order to gain the full, complete and comprehensive picture of the perceptions of customers, prospective customers and employees, qualitative<sup>2</sup> research must be part of the mix. It's the only way to ensure that a business really understands the research data in front of it.

### *Focus Groups and Interviews Take Quantitative Research Farther*

So why is qualitative research so important? Four reasons:

1. Qualitative research can **identify the key issues** that need to be addressed in a quantitative study.
2. It can identify the needs and expectations of a target group.
3. It can identify **the points most important** to a target group.
4. It can dig deeper into issues identified by quantitative research.

Look at it this way: Quantitative research always starts with an

### *Hamilton Beach Protects Their Product Launches with Qualitative Research*

Hamilton Beach was ready to launch into two new international markets: Europe and Mexico. But they weren't going to do it cold. The small kitchen appliance maker knew they were a household name in the U.S., but what about the rest of the world?

The firm deployed a combination of qualitative and quantitative research to gauge the reception they were going to receive. In Mexico, qualitative research confirmed the sturdy brand acceptance of Hamilton Beach among consumers, while the quantitative research showed that the feature mix was just right, ensuring a successful launch.

In Europe, focus groups told a different story. European customers consider American products as niche items, and not as mainstream as the products they were used to. Fancy features, such as an 18-speed blender, are actually a negative as continental consumers prefer simplicity in their appliance design. And they prefer style, with elegant curves and robust colors, something that traditional black and white American appliances lack.

Qualitative and Quantitative research confirmed Hamilton Beach's perceptions about the Mexican consumer base, and the company moved forward with a strong product launch. In Europe, qualitative research, particularly focus groups, alerted the firm to negative customer perceptions that they were not even aware of. Perceptions that only qualitative research could identify—these perceptions that could have been disastrous if the Hamilton Beach had not decided to postpone their European product launch<sup>3</sup>.

assumption to be proved or disproved. But where does that assumption come from? Before assumptions, you need insight. **Insight is what qualitative research delivers.**

## *Example: Qualitative Research in Action*

Let's say you're conducting an employee survey. One of the issues of concern identified by employees during the survey was "communication". But what does that really mean?

With qualitative research, such as a focus group, you could target a select sample of respondents to get to the bottom of the issue. This group can answer very telling questions such as:

- Where does the issue lie (with what groups or company divisions)?
- What does "communication" mean to you?
- How does it affect your ability to get your job done?
- What types of steps would improve this situation over what currently exists?

Armed with this information, you can take actions that will make a difference<sup>4</sup>.

## Qualitative Research is More Than You Think

Qualitative Research is exploratory in nature. It provides insights and understanding of the research problem setting, and explores the problem with few pre-conceived notions. It's a strong method to develop the approach that will later be used by quantitative research. And when the results of a quantitative study produce unexpected results, qualitative research can provide the explanations.

### *Defining Focus Groups<sup>6</sup>*

A focus group is an interview with a small group of respondents conducted by a trained moderator in a nonstructured and natural manner. That simple definition hides the rich and powerful perspective that can be gained from such a free flow of information.

There are six steps to conducting a typical focus group. They are:

1. Design the focus group environment—Define the setting for the session to take place, define the length of the session and what method will be used to record the session.
2. Recruit and select the focus group participants—Normally 6-12 participants, as group dynamics usually suffer with a larger group.

Participants should be homogeneous in terms of product usage demographics and socioeconomic characteristics.

3. Select a moderator—Must be well-trained, typically with a background in psychology and marketing. Discussion facilitation skills and the insightful interpretations of responses are a critical requirement.
4. Prepare the discussion guide—An outline of the topics to be covered is always necessary to provide structure to the discussion, and it should reflect the objectives of the research.
5. Conducting the group interview—During the discussion, the moderator must:
  - Establish rapport with the group
  - State the rules of group interaction and set objectives
  - Probe the respondents and provoke intense discussion in the relevant areas
  - Attempt to summarize the group's responses to determine the extent of agreement
6. Prepare the focus group report—An objective analysis and complete report needs to document the findings for further study.

### *Characteristics of a Typical Focus Group<sup>7</sup>*

Group Size	6 to 12 participants
Group Composition	Homogeneous; respondents are prescreened
Physical Setting	Relaxed, informal atmosphere
Time Duration	1 to 3 hours
Recording	Audio and/or video
Moderator	Observational, interpersonal and communication skills of the moderator are critical

### *Defining In-Depth Interviews*

An in-depth interview is a loosely-structure conversation like a focus group, but the goal here is to uncover the hidden motives, beliefs and attitudes that might not be shared in a group setting. Typically lasting from 30 minutes to an hour, this is a one-on-one discussion where the interviewer probes deeply to get to the heart of an issue.

## Comparison of Focus Groups and In-Depth Interviews<sup>8</sup>

Characteristic	Focus Groups	In-Depth Interviews
Group synergy and dynamics	+	-
Peer pressure/group influence	-	+
Client involvement	+	-
Generation of innovative ideas	+	-
In-depth probing of individuals	-	+
Uncovering of hidden motives	-	+
Discussion of sensitive topics	-	+
Scheduling of respondents	-	+
Amount of information	+	-
Bias in moderation and interpretation	+	-
Cost per respondent	+	-

*+ indicates a relative advantage over the other procedure*

*- indicates a relative disadvantage over the other procedure*

## 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 launch<sup>10</sup>.

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 are<sup>11</sup>:

- **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**<sup>12</sup>.

## 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 problems<sup>13</sup>:

- 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 organization<sup>14</sup>.

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.

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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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