



Qualitative Research in the US 10 Trends & Move Toward Mobile

Presented to JMRA
November 28, 2017

AGENDA

Qualitative Research in the US

BACKGROUND



WHY IS MOBILE
SO HOT IN US?



EXAMPLES



WRAP UP



OVERVIEW of
TRENDS IN US
US QUAL



LOGISTICS

- PRE-WORK
- PRODUCT USAGE
- COMPLEX PROCESS
- OTHER USES

LEAPFROG MARKETING RESEARCH

Full-service qualitative marketing research firm established in 1995.



EXPERIENCED

20+ years in the industry
8 years in NYC Advertising Industry
RIVA Certified Master Moderator and former trainer
Active in QRCA, former Board member



METHODOLOGIES

In-person Focus Groups, IDIs
Online Discussion Boards, Insight Communities
Mobile
Ethnographies
UX Studies
Phone Interviews



CLIENTS

Google, YouTube, Netflix,
Madison Square Garden, Sports Authority,
NBC, Stanford University, Autodesk
Counsyl, Libratone, iRobot
Hawaiian Airlines, University of Phoenix
Ben & Jerry's, Nestle, Clorox, Mango Board
And others...



JAPAN

Arrived a year ago
Family adventure
Don't speak Japanese ☹️





10 TRENDS in US QUALITATIVE

What's Happening in US Qual?



1. More **VIDEO** at all stages – meetings, collection methods, participant contributions, reports

2. **Hybrid studies** - multiple methodologies used in a single study



3. **Quick Qual** - Fast-turnaround, **single-focus** studies to kick off a project, explore issue, expand reach

10 Trends in US Qual

4. Emphasis on understanding how to deliver better **customer experience**;
Customer Journey research going strong!



5. **Power-packed deliverables** – fast, short, visual, action-oriented; web site reports

6. Opportunities for **longer term QR engagement**



10 Trends in US Qual



7. **Less backroom**

Clients want to take part – co-creation
More DIY

8. **Web conferencing viewing** for international studies; less travel



9. **Don't forget in-person!** Move back to include face-to-face to supplement digital, easier to take-to-heart

10. **Mobile qual is everywhere** - impacting methodology and deliverables



Exploring Mobile



Challenge: Limitations of Face to Face



Time constraints

- Limited to 1, 2, 3 hours at a time
- One point in time
- Easy to miss the critical moments

Reliance on memory

Impact of others

- Other participants
- Researcher
- Observers

Impact of location

- Focus group room

Location constraints

- Can't go on vacation with them, watch them care for their newborn, attend a Dr's appointment...

Solution: Mobile Qualitative

- Qualitative research using a mobile device to collect learning from smartphones and tablets.
- A digital ethnography or digital immersive study.
- **Allows moderators, observers and participants to engage in research from anywhere at any time.**
- Easily collect text, photos, videos and audio.
- Uses specially designed apps and browser-based services.
- Can be standalone or hybrid project, or part of an Insights Community.
- *Could* do mobile qual with standard email and texting services, but it is much more labor intensive and lacks many tools to facilitate insightful research.



How does it work?

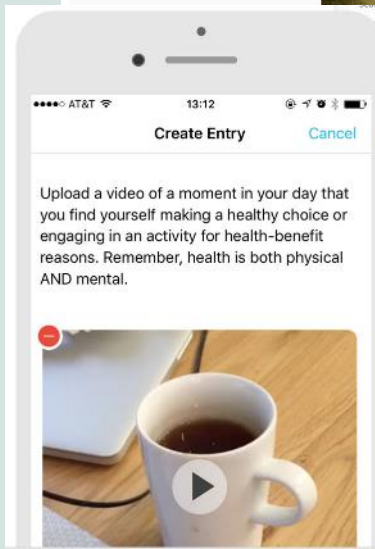
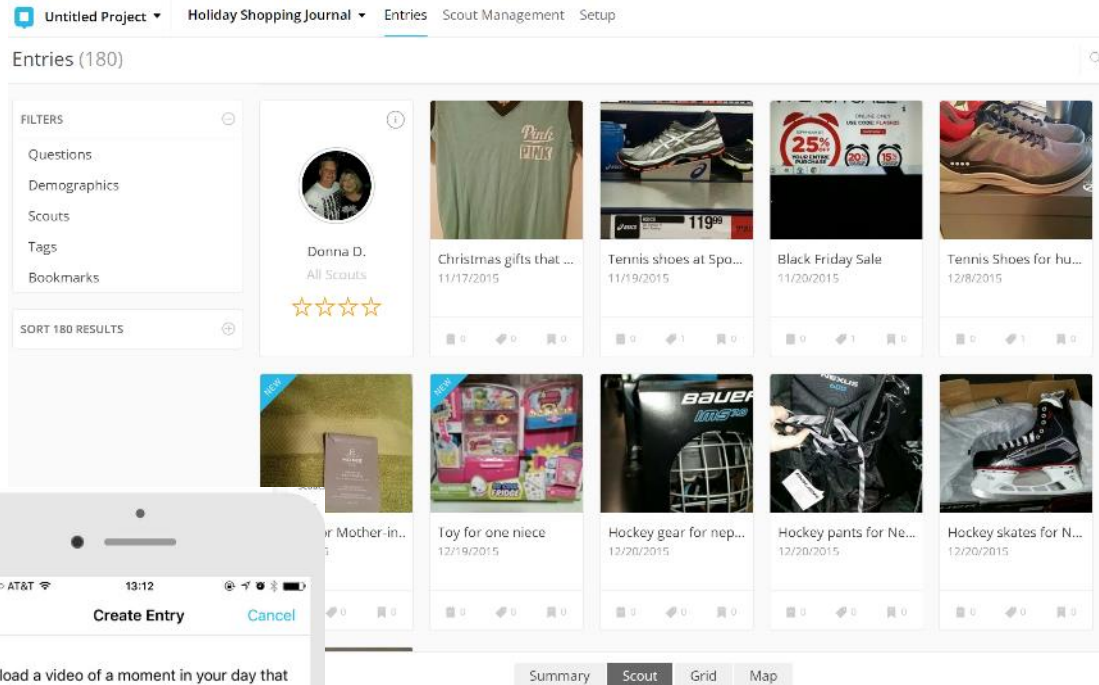
Researcher:

1. Select research platform
2. Design your study
3. Recruit participants
4. Collect responses
5. Analyze data

Participant:

1. Download app
2. Respond to study invitation
3. Answer questions with text, images and videos

Opportunity for probing and in-depth discussions with some platforms and not with others.

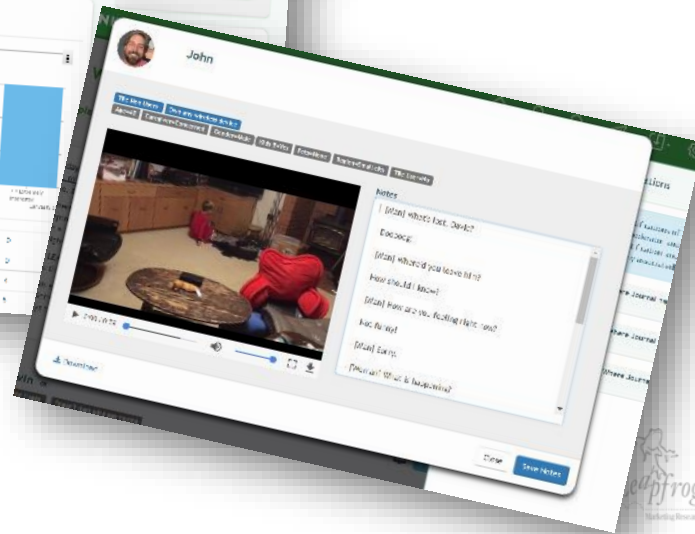
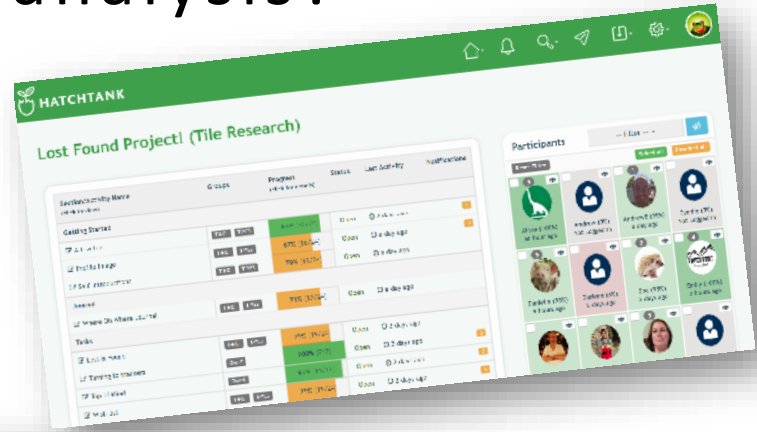


Screenshots: dScout

How to do analysis?

Similar to analysis from in-person ethnographies, but easier

- “Transcripts” included, sometimes even audio is auto-transcribed
- Basic quant analytics
- Filters, tags, sort and review by participant, question, segment, date, etc.



Why Consider Mobile Qual?

Participants are *already* heavily using mobile to share opinions, photos, videos and stories.

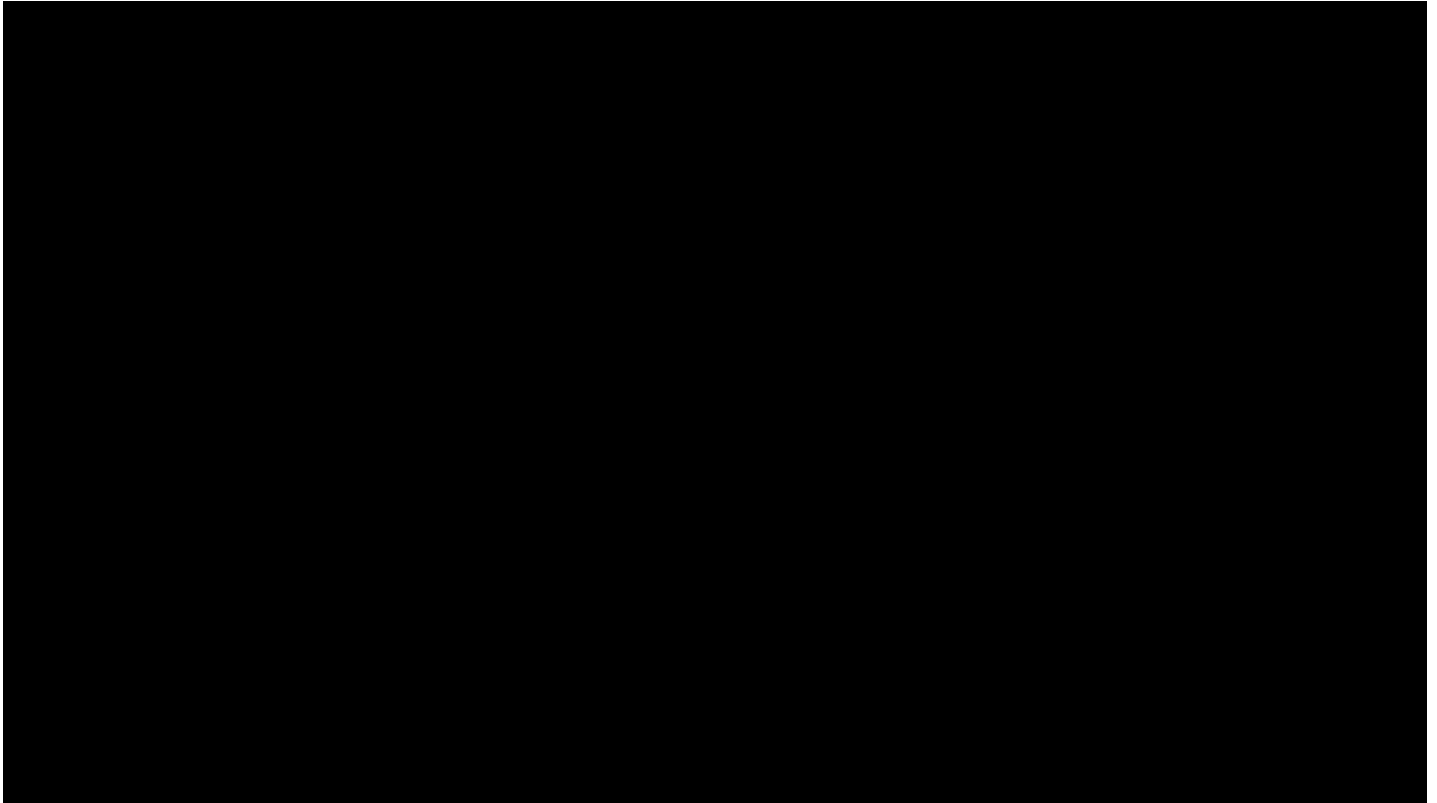
They have their smartphones with them all the time.



We can collect richer, more detailed and more accurate learning if we tap into this behavior and use it to uncover more valuable insights.

Participants Take Their Phones EVERYWHERE

“Hi dScout . . .”



Video credit: dScout

Advantages of Mobile Qual

- Be **in-the-moment** with participants, where the action is happening, no matter what the location or time of day
- **Longitudinal dialogue** – learn from same person multiple times at different stages of process or experience
- **Removes the reliance on memory**; can show, not just tell
- **See context**, emotions
- Participants are comfortable with mobile and **speak more freely** (fewer inhibitions)
- They have time to develop **thoughtful responses**; can consider challenges, desired improvements, etc.



Advantages of Mobile Qual, cont.

- **Easily collect mixed media** - photos, videos, audio and text-based responses – inspirational for clients, creative teams, researchers
- Geo-location, geo-fencing and push notification options
- **Expand geographic reach**
- **Efficiency** – watch and learn from many participants each day, save travel time & money

Take advantage of the opportunity to understand markets and situations that were previously unreachable.

A person wearing a green sweater is sitting at a wooden table outdoors. They are using a tablet computer with their right hand. To the right of the tablet is a white coffee cup on a saucer. The background shows green foliage and a warm, golden light, suggesting a sunny day.

Four Scenarios

1. Pre-group work
2. Product trials
3. Understanding complex processes
4. Other uses in US

Learn A Lot Quickly

Use mobile to kick-start a project . . .

- *Client Objective:* To understand how US Millennials use cosmetics
- *Challenge:* To get a lot of ideas quickly from a wide geography at an affordable price
- *Methodology:* **Quick Mobile Study with 250 women across the US**
 1. *“Show me your biggest beauty challenge and describe it.”*
 2. *“Take a photo of your favorite new cosmetic product and tell me how you heard about it and what convinced you to purchase it.”*
- *Benefits of mobile:* Photos, videos, qual & quant, and hundreds of ideas in < 4 weeks



Millennials & Beauty Issues



My hair gets dry and then I get a lot of split ends . . .

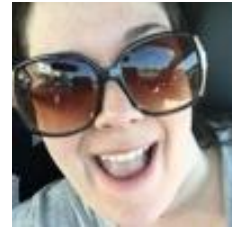


Skin is always oily and shiny in summer...



Starting to worry about wrinkles . . .

I work and play hard and then have to deal with dark circles around my eyes ...



Hyperpigmentation is a constant problem . . .



My nail polish never lasts when I do it myself ...



Hard to get eyeliner on smoothly ...



Transforming Participant Homework

Use mobile when you need to be in a challenging location . . .

- *Client Objective:* Generate ideas for how to improve in-car infotainment systems
- *Challenge:* How to study challenges people encounter while driving
- *Methodology:* **5-day “Auto Journals” with twelve participants before in-person interviews.** Conducted over weekend and weekdays to cover varied driving situations.
- *Benefits of mobile:* A deep understanding of participant’s relationship to their car, driving practices and what issues they run into . . . from their natural environment and *before* we meet them.

5-Day Auto Journals

DAY 4

AnitaV (2/29/2012 8:59:33 PM)

These pictures are pretty much the same as the last set I sent. This shows my iphone connected to the car source so that I can play music from my itunes in my car. It is rigged up to pay the \$450 to get it installed in my car. It works OK - but is not able to play the artists or playlists while driving, so I usually just put it on shuffle.



AnitaV's Journal

Name: AnitaV
 Demos: 58 yrs, married, Caucasian, post grad
 Occupation: Retired therapist and mememaker
 Car: 2011 Mazda, CX9 - SUV
 Key themes: Feels sexy and young in car, drives for short errands, frustrating nav system, looking for safety, efficiency



JAN 1

AnitaV (2/27/2012 12:41:00 AM)

- #1
 - 3 things I like:
 - I love the functionality of my car - the fold down third row seats!
 - Beautiful styling for such a functional vehicle
 - Well designed and luxurious looking interior!
 - 3 things I don't like:
 - The low gas mileage
 - Terrible Nav system
 - Uncomfortable headrests
- #2
 - My car makes me feel sexy and young and like I have a great

Anita's DRIVING LOG

JAN 1

Today I drove to Sears, University Electric, Safeway, Home, Home Depot, OSH, Home then my husband took it out to Airport Appliances and Western Appliance. I was in the car for approximately 1 1/2 hours and my husband was with me. We were shopping around for a new cooktop and also some grocery shopping.

JAN 2

AnitaV (2/27/2012 9:56:00 PM)

Went grocery shopping at two stores - Safeway and Trader Joe's - total time in the car 20 minutes. I went alone.

AnitaV (2/28/2012 2:58:05 AM)

Drove to a meeting in Sunnyvale this evening - 15 minutes there and 15 minutes home drive. I was alone both ways.

JAN 3

to library - drop off book - 15 min

to Nursing home - visit mother in law - 5 min

to Target - shopping - 10 min

home - 15 min

AnitaV (2/28/2012 10:45:28 PM)

to gym for workout - 15 minutes

to home - 15 minutes

JAN 4

to library to drop off another book - 5 minutes

to CVS to look for specific shampoo - 5 minutes

to Cost Plus for grocery items - 15 minutes

to Nursing Home for a visit and quarterly meeting - 20 minutes

to another CVS - finally found that shampoo! - 15 minutes

to Safeway to get something for dinner tonight - 5 minutes

to Home - 5 minutes

JAN 5

to University Electric - appliance shopping - 20 minutes

to produce store to get avocados - 15 minutes

to Nordstrom Rack - shopping - 5 minutes

to home - 15 minutes

Other ideas for when mobile pre-group homework would be helpful?



1. Show me your biggest laundry challenges
2. Take me on a video tour of your work space
3. Show me how you prepare and cook dinner using your BBQ grill
4. Record your Coffee Moments for 3 days
5. Tell me about the biggest frustrations you have with your mobile phone
6. ?
7. ?
8. ?

Product Placement Studies

Watch and learn . . .

- *Client Objective:* To explore consumer reaction to a new paper towel product
- *Challenge:* To learn how families would use and react to this new product in the natural usage scenarios they encounter at home
- *Methodology:* **7-day digital immersive study using online and mobile platform. Mail out rolls of paper towels to participants.**
- *Benefits of Mobile:*
 - Easy for participants to share all the ways they used the product
 - Enough time for families to use a whole roll and form a solid impression of product – learned likes and dislikes based on real experiences
 - Learned from 35 participants from across the country for 7-days over 7 days (vs. just ~2-3 hours with each over 12+ days with in-home interviews).



Paper Towel Product – In-home Placement

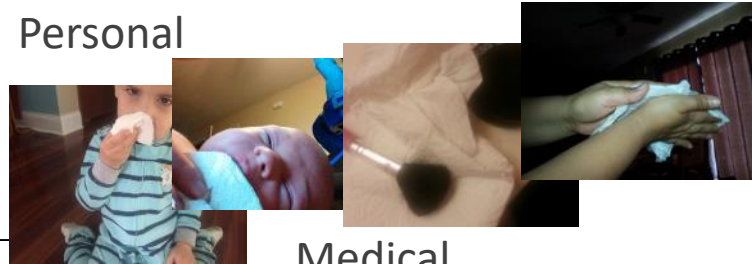
Cleaning/Wiping



Spills

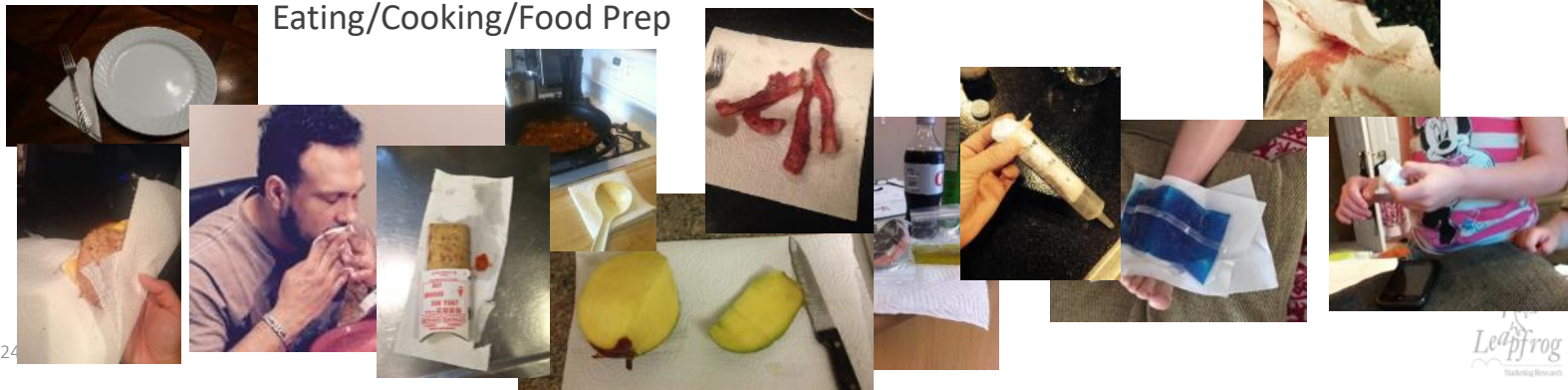


Personal



Medical

Eating/Cooking/Food Prep



Other ideas for when mobile feedback on product usage would be helpful?



1. Explore reaction to new on-the-go food
2. Watch how usage of skincare product evolves over time
3. Look for opportunities to enhance a music service
4. Learning under what conditions new hi-tech sporting apparel will be worn
5. ?
6. ?

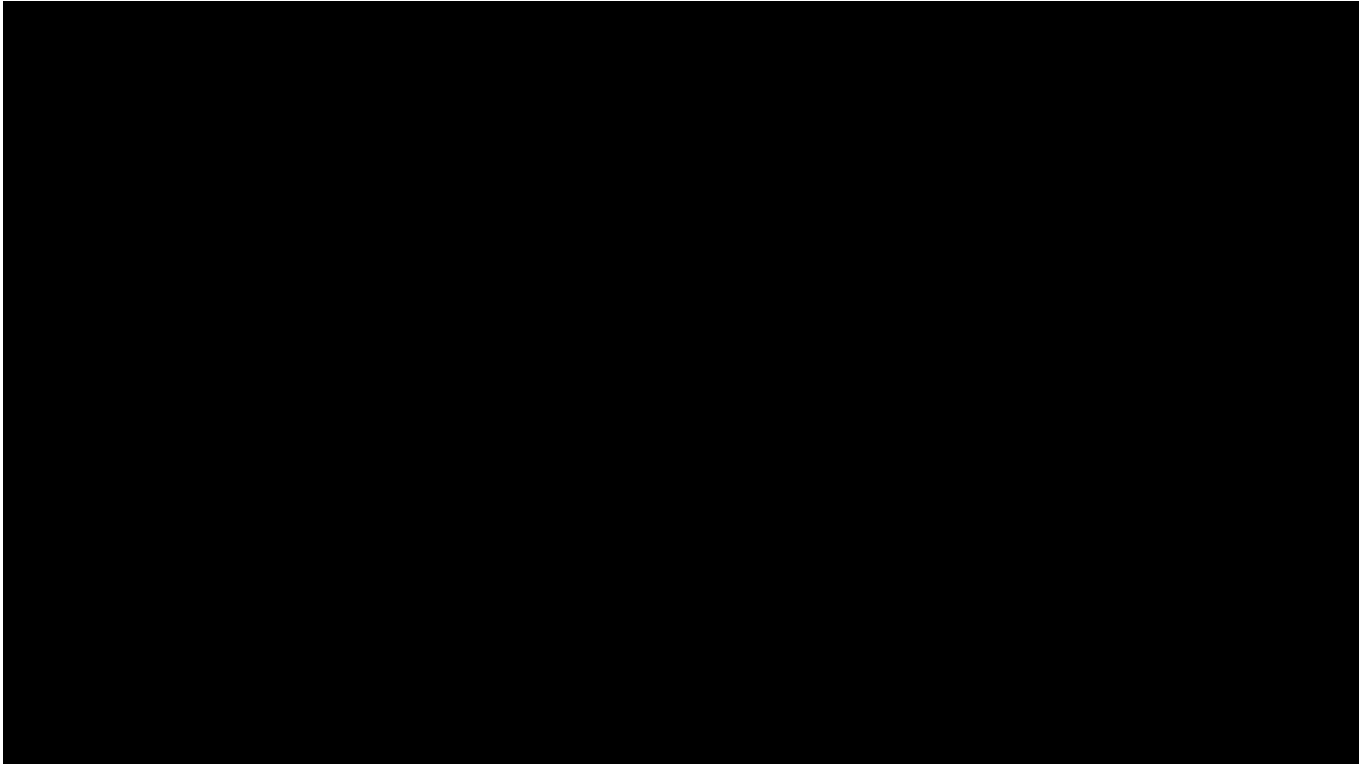


More Involved Processes

Customer Journey . . .

- *Client Objective:* To explore how consumers buy sports equipment. Build on learning from quantitative survey.
- *Challenge:* To learn about process that takes days or weeks to complete in a variety of locations.
- *Methodology:* **Two-week study including mobile app and online discussion board.** Participants reported on each step of process, many when and where they naturally happened.
- *Benefits of Mobile:*
 - Able to “be with” (virtually) participant when they did researching, planning, purchasing, etc. – online, in a store, at home, etc.
 - Generated lots of images and videos which helped bring journey to life for client team.

Customer Journey



Other ideas for when mobile could help you learn about a long-term process?



1. Planning a vacation
2. Buying an engagement ring
3. Holiday preparations
4. ?
5. ?

Take Advantage of Cultural Differences

Learn about in-store experience in the US

- *Client Objective:* To explore what drives in-store purchase decision of bath tissue
 - Also great approach to learn about competitive retail experience
- *Challenge:* To learn about the shopping experience while minimizing impact on consumer behavior
- *Methodology:* **25 remote shop-alongs using mobile app**
- *Benefits of mobile:* More natural shopping experience. Learned many details – in the moment. Participants showed wide variety of things that worked well in-store, and what did not.



Remote Shop-a-Longs in US



Other ideas for when remote shop-a-longs would be helpful?



1. Shopping for snack foods
2. Shopping for school supplies
3. ?

Or think beyond shopping -

“Show me how . . .”

1. You do laundry
2. You get ready in the morning
3. You train your dog
4. ?

Next Steps

As researchers, we need to:

- Expand our offerings to tap into this (new) participant behavior.
- Design studies that take advantage of peoples' willingness to share anytime from everywhere.
- Show our clients how powerful this methodology can be.



Recommended Resource

Qualitative Research Consultants Association (QRCA)

www.QRCA.org



International research organization for qualitative researchers who work independently, for a research company, or in academics

- Annual North American **Conference** and Biennial Worldwide Conference
 - Phoenix, AZ, USA – January 2018
 - Valencia, Spain – May 2018
- Quarterly **Virtual International chapter** events
- **Monthly webinars**
- **Award-winning VIEWS magazine**
- **Online directory of qualitative research professionals** and resources
- A **passionate membership**; the industry's best advocates



Domo arigatou gozaimasu!

ご清聴をいただきまして、誠にありがとうございました。
アメリカや日本での定性調査や、市場進出にからむニーズがございましたら、ご遠慮なくご連絡くださいませ。日本語で対応させていただきます。
長年日本の企業さんと深い関係に恵まれておりますことを、心より感謝申し上げます。
引き続きご支援をいただきたく、よろしくお願い致します。

Thank you for attending this presentation; we appreciate your support! Please let us know if you have any market research or market entry needs in Japan or in the United States; we look forward to partnering with you. Thanks!



Dorrie Paynter
Leapfrog Marketing Research
Dorrie@LeapfrogResearch.com
070-1513-4875



Steve Pollock
Leapfrog Marketing Research
Steve@TurnstoneVentures.com
080-3499-2655

