DIARY OF AN
Online Focus Group

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A **decade ago, it was a lonely world for an online qualitative researcher.** Back in 1997, I worked for an enterprising market research firm in New Jersey, moderating focus groups in public AOL chat rooms. Those were the days… the loud hum of the office servers, my shiny new 386 PC with its microwave-size monitor taking up three-fourths of my desk, wires protruding from every conceivable location, the constant ringing of telephones. My, how things have changed.

Today, with less overhead and programming knowledge required, online qualitative research offers QRCs and their clients a very real solution in a challenging economy. The internet also affords the innovative QRC the chance to really shine, from organizing creative bulletin-board discussions to conducting personal IDIs with text and video via instant messenger programs.

The core skills required to be a good QRC are the same for online as they are for in-person research. Clear objectives, effective screening, an unbiased discussion guide and insightful analysis are the foundation of any good qualitative research study. With online studies, these valuable elements become the focus, while ancillary project expenses, like travel and transcription fees, get the heave-ho.

Whichever online data-collection method(s) you choose, most will provide fast access to a digital record of the interview, helping you get your analysis to the client faster. A few innovative research companies have developed hybrids of the methodologies listed here, offering even greater customization to meet your research needs. Besides InsideHeads, you can shop for online qualitative research services

from 20/20 Research, Artafact, Focus Forums, itracks and QualVu, just to name a few.

Online Qualitative Methodology	Communication via…	Timing	Duration of Data Collection
Bulletin-Board Focus Groups	Text, with possible Audio/Video components	Asynchronous (threaded over time)	Over several days or weeks
Online Focus Groups	Text &/or Audio/Video (via participant webcams)	Synchronous (real time)	1–2 hours
Online IDIs	Text &/or Audio/Video (via participant webcams)	Synchronous (real time)	15–30 minutes

Debunking the Myths of Online Moderating

You need to be able to "program" code.
Many qualitative research applications today have simple interfaces that do not require any programming knowledge.

You need to be a fast typist.
You do not need to don a cape and be a Super Typist to moderate online focus groups successfully. Some facilities even provide for a pre-loaded discussion guide, eliminating the need to type

every question separately and making your follow-up probes more responsive.

No facial expressions is a problem.
People convey emotion with typed words every day via email, IMs, text messages, tweets, social networking posts, you name it. In an online focus group, participants are aware of their environment and frequently use emoticons and familiar abbreviations to clarify their opinion.

Putting Online to Use

Making it happen does not require magical talents. Skilled QRCs already have the tricks they need to conduct successful qualitative research studies online. Take a look inside the diary of one online focus group project and learn how you can apply what you already know.

Day 1
☑ *Project awarded.*

Weeks earlier, InsideHeads provided a client a proposal to conduct a website evaluation among prospective graduate students. The client team was developing a new website and needed feedback on desired site layout and features to direct its design recommendations. The research proposal included handling the recruiting, moderating two online focus groups and providing the transcripts along with a written report.

For this study, we proposed text-based online focus groups, which would maximize the volume of data collected in just two groups. Since multiple participants respond simultaneously, nobody waits to speak, and the conversation proceeds briskly. Compared to in-person groups, text-based online focus groups can provide for twice the number of participants and yield exceptionally "meaty" transcripts (15,000+ words).

Although this study was clearly appropriate for online administration, other qualitative research objectives can be successfully achieved online. Sensitive or personal topics are especially well suited for online research because of the inherent freedom and anonymity the environment provides.

What kind of qualitative research studies work well online?
❏ Advertising and message tests
❏ Concept tests and new-product development
❏ Brand image and positioning research
❏ Website evaluations, including content, layout, design, navigation and features
❏ Name and logo tests
❏ Ideation / brainstorming
❏ Establishment of consumer vocabulary for questionnaire development

Making online focus groups happen does not require magical talents. Skilled QRCs already have the tricks they need to conduct successful qualitative research studies online.

☑ *Emailed the InsideHeads research team and alerted it to new project & schedule.*
Since our client had a presentation to his client in less than three weeks, both online focus groups were scheduled to occur two weeks later at 7 p.m. and 9 p.m. EST, providing reasonable meeting times across the different U.S. time zones.

☑ *Confirmed the proposed recruiting resources.*
An email address list of prospective students was available from the client, so the plan was for InsideHeads to prepare the online screening questionnaire, and the client would distribute the emails with the screener link.

Although in this situation, we had an available pool of students from which to recruit, many traditional screening and recruiting methods, like phone or direct mail, can also be used for online focus groups. As with in-person research, recruiting the right participants is critical to the success of the research study, so you will want to consider recruiting costs and timing carefully before submitting your proposal.

If you, or your client, do not have available access to a sample source from which to recruit, you can consider outside panel companies, opt-in email lists and customer databases, in addition to traditional recruiting methods. Check within your existing network of recruiters and focus facilities, as they may handle online recruiting or work with a partner who does. You may want to recruit from multiple sample sources for some projects.

Each provider has competencies in different markets, as well as different identity verification and reward methods. ESOMAR's recently updated "26 Questions to Help Research Buyers of Online Samples" (at www.Esomar.org) is a great reference when selecting the proper recruiting resource for your study.

When selecting a recruiter for your online focus group projects, they'll need to know the following in order to provide you an accurate quote:
■ Total number of groups
■ How many qualified participants you expect to have in each group

A big advantage of setting up your own online screeners is that once you have a template, you need only modify it for future studies.

- Duration of each group discussion
- Participant requirements and group segmentations, if any
- Project timing
- Incentives (amount and who has distribution responsibility)
- What you want the recruiter to handle (sample only, online screener, incentives, etc.)
- Any special instructions

☑ *Confirmed virtual focus facility.*

For this study, we used the InsideHeads virtual focus facility. Know which facility resource you will use before submitting your proposal, since costs, timing and the level of your involvement will vary depending on the platform you choose.

☑ *Drafted written screening questionnaire; emailed client for review/approval.*

Day 2

☑ *Received client approval on written screening questionnaire; began programming for online administration.*

Although we used proprietary survey programming software to program the screener for this study, you can do it for little to no cost on your own, or you can hire a company to manage it for you. Often, the recruiter and/or facility provider you choose will also handle the online screener administration as part of their service.

Some great do-it-yourself (DIY) survey tools exist online for free, with low costs for added features (e.g., SurveyMonkey.com, Survey Gizmo.com, etc.). They are relatively simple to learn and enable you to gather screener data and manage recruiting on your own.

DIY survey tools are handy when you already have an email address list of people you need to screen further. A big advantage of setting up your own online screeners is that once you have a template, you need only modify it for future studies.

To actually send out invitations to an email address list of recruits to be screened, you can use the merge mail features of your existing email program, or consider a bulk emailer program like WorldMerge, eMerge, MailWorkz or King Mailer, to name just a few.

❑ Be sure to name your screening questionnaire something unrelated to your client or the research topic (often, the "name" is visible in the resulting url link).

❑ When inviting people to take your online screening questionnaire, be sure to include a response deadline, as well as clear incentive rules and a clear explanation of the time investment that will be required.

❑ Remember to screen for "available internet access" at the scheduled group date/time, as well as other standard industry screening and past research participation.

❑ If you are recruiting children to participate in a research study online, be sure to comply with the Children's Online Privacy Protection Act (COPPA). You can find more information at www.coppa.org.

❑ To catch people who disqualify appropriately, consider adding a hidden programming question in your survey (not visible to the respondent) that will secretly tag those who do not qualify (that way, respondents who go back to a page and change their answers in an attempt to qualify are still tagged as disqualified).

❑ Throughout your online recruiting, keep a keen eye on responses. Within two days of sending the email invitations to the screener, you should have at least half the groups filled. By the end of the third day, you should be confident that you can fill all the groups with enough qualified participants. Expect a significant drop-off in response after three days of sending the invitations to take the screener. If you have any concerns, act quickly to supplement recruiting efforts and ensure fulfillment.

Day 3

☑ *Screener posted online; emailed client the link for final review/approval.*
☑ *Drafted discussion guide; emailed client the file for review/approval.*

The purpose of this research was to gauge reactions among students to specific website features and content, as well as to review three competitive websites. Participants were questioned about their decision-making process and how information contained within a website could add

value and enhance their school-selection process. Questions for competitive sites focused specifically on site navigation, layout, design, ease of use, preferred features and appropriateness of content.

The discussion guide for this project covered approximately 50 questions across 5 topic changes.

> Introduction (5 minutes)
> Warm-up Questions (5 minutes)
> Competitive Website #1 (20 minutes)
> Competitive Website #2 (20 minutes)
> Competitive Website #3 (20 minutes)
> Reactions to Specific Features (15 minutes)
> Wrap-up (5 minutes)

There is no guaranteed formula, but on average, figure you can get through approximately 1 question (and probing participant responses) in about 1.5 to 2 minutes. You will also need to figure time at the beginning, to welcome participants and give them instructions, and at the end, to wrap things up. Finally, every time you transition to another topic/slide/line of questions, estimate a couple of minutes to explain the transition to participants. If you are used to preparing discussion guides for in-person focus groups, you will be able to get through a lot more questions online.

Day 6
☑ *Received client approval of the screener posted online.*
☑ *Tested receipt of respondent data from the online screening questionnaire one last time before launching.*
☑ *Notified client to release emails inviting potential recruits to complete the online screening questionnaire.*

Day 7
☑ *Monitored recruiting.*

Day 8
☑ *Monitored recruiting.*
☑ *Made discussion-guide edits requested by client; new version sent via email for review/approval.*

Day 9
☑ *Recruiting completed, final participant selections made for each group; instructions sent via email.*

We were able to find enough qualified students from the email list provided by the client, and both groups filled up quickly.

You will want to invite a sufficient number of qualified participants to each online focus group, but still be able to manage the text conversation. We typically invite 25 fully qualified recruits to each group, since about half will show up to participate online. Situations do vary, so consider all factors (incentive amount, participant relationships, etc.) that may affect show rates before deciding how many people to actually invite.

Some experienced online moderators can manage up to 18 or 20 participants at a time in this environment, while others are more comfortable moderating groups of 6 or 8. We strongly recommend that if you are new to online moderating, consider inviting fewer people to each group, or hire a backup moderator to attend your groups for support.

As the moderator, you want to be able to focus on probing participant responses. Distractions, like whether or not "Bob" has responded to your last question, can be alleviated if you have a group administrator. In addition to monitoring participant responses, a good group administrator will also field questions from participants and client observers during the discussion, leaving you free to focus entirely on the scrolling conversation. It is best to establish clear responsibilities with your administrator ahead of time.

Day 10
☑ *Emailed instructions to qualified participants who were selected.*
Each of the 25 recruits who qualified after completing the screening questionnaire received an email with further instructions. As with most of our online focus groups, we assigned anonymous usernames to participants to be displayed during the group discussion as a way of encouraging more open and honest responses.

Typically, the online recruiter or the facility provider will manage sending instructions to qualified and invited participants, although you could manage this yourself using a mail merge program (previously mentioned).

☑ *Emailed instructions for observing the groups to client.*
Observing a group online is a slightly different experience for the client than watching a group behind real glass. Clients observing your groups should attempt to access the facility before the group date/time to ensure that they do not have any connection problems.

Most online facilities allow observers to send private messages to the moderator during the

live discussion. Asking one person to be the spokesperson for all observers can prevent conflicting and contradictory direction coming from multiple observers during the group. Sending observers a copy of the discussion guide, noting the timing allotted for each section, can also help boost the observer experience, as the conversation can seem rather speedy to those new to online chat.

☑ *More discussion-guide edits requested; sent new version of the file sent to client via email for review/approval.*

Day 13
☑ *Discussion guide finalized and uploaded into the online facility.*

A brief excerpt from the project's discussion guide is shown below.

Discussion Guide excerpt…

→ Send competitive site #1 to whiteboard. Please take a moment to look at this page carefully. I will ask you the next question once you have all had enough time to review it effectively.

❏ Have you visited this page before?
❏ What information on this page, if any, is most useful to you? Please explain.
❏ What information on this page, if any, is not at all useful to you? Please explain.
❏ What information is NOT on this page, but it would be helpful to you as a prospective applicant?
❏ Do you get the sense for the school's neighborhood from this site? Why/why not?
❏ How do you feel about the testimonials shown here? Please explain.
❏ How, if at all, do testimonials on this website affect your interest in the school? Please explain. [MODERATOR NOTE: Probe desired source of testimonial]

☑ *Visuals created and uploaded into the facility.*
For this study, the visual stimuli being tested were actual websites, which were displayed on the whiteboard during the discussion. Participants could enlarge the site and view it in a full frame as we talked about different elements.

When preparing slides for your online focus group project, consider including topics of discussion, or section headers, in addition to the visual stimuli being tested, to help keep participants focused on the current subject. Too many topic changes can be disorientating to participants and yield confusing transcripts.

Your virtual focus facility provider will let you know the slide requirements you should follow, and many will create the slides for you. You can create slides yourself using an html editor or even MS Word in some cases. Use slides to change topics, explain concepts, display images, show print ads, surf websites, show videos or even post a web survey.

☑ *Accessed online focus facility to practice; confirmed that the uploaded guide and visual slides were functioning as expected.*

Day 14
☑ *Sent reminder emails to all invited participants.*
☑ *Made reminder phone calls to allinvited participants.*
Calls were made to each recruit in the early afternoon, about six hours before the scheduled groups that evening. Reminder phone calls help further establish a connection with invited participants prior to the group discussion and can greatly increase show rates.

☑ *Moderated two groups online.*
Each focus group in this project was 90 minutes in length, and attendance averaged 14 participants per group. During the group, the moderator sent prepared questions and probed responses, as well as posted slides to the whiteboard. The group administrator fielded last-minute participant phone calls and ensured that each person in the virtual focus facility was actively participating online. Six members of the client's team observed the groups remotely.

As the moderator, you will want to know how much time you have allotted for each "section" in the guide so that you can keep the discussion on track as much as possible. I have found that 90 minutes online is enough time to obtain quality data and still maintain respondent interest. The only time I have ever scheduled a shorter group was with 8–10 year olds, and as it turned out, they would have chatted with me for hours.

Remind participants at the start of the conversation to respond to each of your questions, as well as react to other participant comments as they see fit. Since all participants can respond simultaneously, the exchange of information online is both dynamic and interactive.

It is a good idea to follow up your introduction and explanation of the ground rules with some warm-up questions to get the participants comfortable responding in the facility. The warm-up questions also allow you and the

> I have found that 90 minutes online is enough time to obtain quality data and still maintain respondent interest.

administrator to see immediately if anyone is having trouble.

Reconfirming key participant qualifications at the start of the group discussion can also be beneficial, as any inconsistencies can be addressed immediately.

Reconvening with the client after each group by phone can help clarify and confirm any guide adjustments that should be considered for future groups.

Day 15
☑ *Emailed transcripts to client.*
☑ *Printed transcripts and began analysis.*

Day 21
☑ *Delivered report to client via email, with a conference call follow-up.*

The results of this research study proved very useful to the website design team, who "went into the research with a preconceived idea of appropriate content and left with a completely new understanding."

Findings were organized to address each research objective, and participant comments were extracted from the transcripts and pasted directly into the report.

☑ *Incentive checks printed and mailed.*

Participants in this study each received $50 for their time and opinions. Mailing addresses were collected at the end of the group discussion, and checks were processed and mailed two weeks later.

If the communication and relationship established with participants throughout the research process is genuine, they are typically very satisfied with their experience and accepting of the fact that they will receive their incentive checks by mail within a few weeks of the group discussion. With outside recruiters, sometimes their fee also includes the cost of incentives and distribution. In those cases, they need only a list of the recruits from their panel who participated in order to fulfill the honorariums.

With the internet today, QRCs can experience project efficiencies and creative solutions without sacrificing quality standards. This online research study took three weeks from proposal to report, utilized a small support staff and required no travel. The findings were clear and actionable and of great value to the client. ◪