

FREQUENTLY ASKED QUESTIONS (FAQs) ABOUT ONLINE QUALITATIVE RESEARCH

Prepared By:

**THE QRCA ONLINE QUALITATIVE RESEARCH TASK FORCE
Casey Sweet & Jeff Walkowski (Co-Chairs)**

Fall 2002

TABLE OF CONTENTS

INTRODUCTION	3
METHODOLOGY QUESTIONS	
<i>How representative is the online population, and how important is this to qualitative research?</i>	4
<i>When might it be appropriate to use online methodologies?</i>	5
<i>When might it be inappropriate to use online methods?</i>	6
<i>Have side-by-side comparisons between online and other qualitative data collection methods been done?</i>	7
<i>What online techniques are available to allow collaborative efforts between online quantitative studies and online focus groups?</i>	8
<i>How do respondents feel about the online experience?</i>	9
RECRUITMENT QUESTIONS	
<i>How do I recruit for online focus groups?.....</i>	10
<i>Where do I begin looking for online respondents? Who maintains a panel?.....</i>	11
<i>In screening individuals to participate in online qualitative research, should we be looking for any special qualifications?</i>	12
<i>How do incentives for online focus groups compare to those for face-to-face or telephone groups?.....</i>	13
<i>What is the “right” size for real-time and bulletin board groups?.....</i>	14
<i>How are online groups scheduled to accommodate time zones?</i>	15
<i>What kind of show rate can I expect with online focus groups?.....</i>	16
<i>How do I make sure the respondents are who they say they are?</i>	17
VIRTUAL FACILITY QUESTIONS	
<i>What features do online focus group facilities offer and how do they compare to one another?</i>	18
<i>How secure is the online environment?</i>	19
MODERATOR REQUIREMENTS QUESTIONS	
<i>How can a qualitative researcher determine if he or she is personally suited for online moderating?</i>	20
<i>How important are the keyboard skills of the moderator?</i>	21
GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)	
<i>How is the discussion guide handled in online focus groups?</i>	22
<i>How candid are participants in online groups?</i>	23
<i>How do spelling errors affect respondents’ participation?.....</i>	24
<i>How can stimuli be presented in online research?.....</i>	25
<i>Are projective techniques possible in online groups?</i>	26

<i>How can an online moderator compensate for the absence of body language and auditory clues?</i>	<i>27</i>
<i>How do moderators minimize interruptions/distractions, or deal with non-responders and/or disruptive respondents?</i>	<i>28</i>
<i>If a dominator surfaces in an online group, what techniques can be utilized to manage their participation?</i>	<i>29</i>
<i>What duty does a moderator have to disclose his or her race, ethnicity and/or gender to respondents in the context of an on-line study?</i>	<i>30</i>

SPECIFIC QUESTIONS ABOUT BULLETIN BOARD FOCUS GROUPS

<i>How long is a typical bulletin board discussion group?</i>	<i>31</i>
<i>How can interaction between respondents in a BBFG discussion be maximized?</i>	<i>32</i>
<i>What are some ways to keep attrition rates down for a BBFG?.....</i>	<i>33</i>

SPECIFIC QUESTIONS ABOUT REAL-TIME ONLINE GROUPS

<i>How long is a typical real-time focus group?.....</i>	<i>34</i>
<i>How can a moderator maintain active respondent participation throughout a real-time online group?.....</i>	<i>35</i>
<i>With real-time groups, what can be expected regarding respondents' posting speed and how can the moderator best manage the flow?</i>	<i>36</i>
<i>How can the moderator encourage respondents to read others' posts and maximize interaction in a real-time focus group?.....</i>	<i>37</i>
<i>What special skills are needed for moderating real-time online focus groups?... </i>	<i>38</i>

ANALYSIS QUESTIONS

<i>Are special analysis techniques needed for online groups?</i>	<i>39</i>
--	-----------

CLIENT MANAGEMENT QUESTIONS

<i>Can clients view or observe the group? To what extent can clients communicate with the moderator?.....</i>	<i>40</i>
<i>How can I prepare my client for their first online group?</i>	<i>41</i>

FINANCIAL CONSIDERATION QUESTIONS

<i>What are the cost components of an online qualitative project?</i>	<i>42</i>
---	-----------

QUESTIONS ABOUT WHAT OTHER RESEARCH ORGANIZATIONS SAY

<i>Have any organizations developed policies and guidelines for online qualitative research?</i>	<i>43</i>
--	-----------

INTRODUCTION

In the Spring of 1999 the QRCA Board established the Online Qualitative Research Task Force to explore the online environment, ascertain the implications and opportunities for qualitative researchers, and educate members in the process.

Originally, there was a desire to uncover and document “best practices” in the online arena. During the first year it became apparent that the online qualitative research area was still very much in its infancy, which precludes the development of true best practices. The Task Force instead decided to pursue the development of Frequently Asked Questions (FAQs) to reveal the collective thoughts of online moderator practitioners.

Some of the FAQs are intended for novices – those with little or no experience in online qualitative research. Other FAQs are geared toward the more seasoned online qualitative researcher – they deal with more “advanced” questions/issues such as how the online moderator can effectively promote interaction, how to minimize drop-outs in the course of a bulletin board, and how truthful the moderator should be in terms of what he/she reveals about him/herself to the group.

The FAQs represent some of the best thinking on the subject of online qualitative research. They encompass the experience of task force members, primary and secondary research conducted by the task force over the past three years, and on one question, reflect input from the QRCA’s Professionalism Committee.

The current set of FAQs took two years to prepare with untold hours devoted to their preparation. While the FAQs were initially drafted in 2000-2001, they took final shape in 2001-2002. The Task Force members who have been devoted to this effort over the past two years were Kalpana Biswas, Mary Cowden, Lina DiBlasio, Nancy Farkas, Brenda Johnson, Lisa Kindig, Abby Leafe, Kristin Schwitzer, George Sloan (board Liaison), Casey Sweet (co-chair), David Van Nuys, Jeff Walkowski (co-chair), Foster Winter, and Monica Zinchiak.

We recognize that the online arena will continue to grow and change over time as more information and experience is gathered. As a work-in-progress we are open to revising these FAQs and/or adding to the set. Let us know if you find there are topics about online qualitative that can be added or expanded. Please address your comments to the Task Force co-chairs (caseysweet@prodigy.net or jeff.walkowski@qualcore.com).

METHODOLOGY QUESTIONS

How representative is the online population, and how important is this to qualitative research?

According to Nielsen/NetRatings (January 2002), 60% of U.S. homes have Internet access. This indicates that the online population is increasingly representative of the U.S. population, although historically it has been younger, more educated, and more affluent than the population average. While a "representative sample" from which to project findings is not the objective for qualitative research, it is important to consider the type of respondent for a particular study and to screen for the appropriate characteristics. The online population is becoming sufficiently large and diverse to recruit the desired respondents.

Around the world, other countries that come close to the U.S. on Internet penetration are (this information is current as of January 2002):

- United Kingdom (55%)
- Sweden (51%)
- Norway (49%)
- Switzerland (47%)
- Canada (45%)
- Netherlands (43%)

For the latest figures on online populations by country, click on the following link:

http://cyberatlas.internet.com/big_picture/geographics/article/0,1323,5911_15115_1,00.html

METHODOLOGY QUESTIONS

When might it be appropriate to use online methodologies?

Some examples of situations where online focus groups have been found to be useful include:

- Website evaluation/feedback sessions or other topics related to the Internet, computer technology or high-tech product/service categories;
- Studies on sensitive topics, where anonymity is desired;
- Studies with low incidence;
- Studies where a wide geographic dispersion is required, including rural areas;
- Studies with B2B professionals and others with limited time (since travel to/from a facility is not required);
- Studies with teens and young adults, because of their affinity with the online environment;
- Projects with a budget too tight to accommodate large expense items like travel;
- Fast turnaround projects, because email can be a fast way to reach a large number of potential respondents quickly.

METHODOLOGY QUESTIONS

When might it be inappropriate to use online methods?

Some examples of situations where online focus groups may not be the best methodology are:

- When capturing body language or facial expressions is deemed essential for the research;
- When there is a need to show prototypes or 3D models (although some moderators, with client approval, have found ways around this by sending respondents the necessary samples in advance of an online group); with higher bandwidth, 3D graphics of prototypes that can be examined and manipulated are becoming increasingly possible;
- When products need to be handled or hands-on usage is deemed critical and the touch/feel experience is mandatory;
- When testing fragrance or flavor, or testing TV advertising (although some researchers are reporting some success with testing broadcast advertising online);
- When client materials are highly confidential and the client cannot afford to take any risk that stimuli will be copied by a respondent.

METHODOLOGY QUESTIONS

Have side-by-side comparisons between online and other qualitative data collection methods been done?

Over the last several years, some researchers have conducted side-by-side studies to determine the extent to which online qualitative research methods will yield the same results as face-to-face and telephone groups

The number of side-by-side studies in the public domain is rather small and the very nature of qualitative research makes it difficult to make “apples to apples” comparisons of the different methodologies. However, some published side-by-side studies (as well as anecdotal experiences of QRCA online moderators and case studies presented at conferences by QRCA members and non-members) suggest that while the methodologies differ, the learning is substantially the same across the different data collection methods: face-to-face, telephone, online real-time chat rooms and online bulletin boards.

Experienced online qualitative researchers tend to view the online method as simply another way to collect information from respondents. Online researchers tend to NOT view online qualitative methods as a replacement for face-to-face or telephone studies. A qualitative research consultant should consider both the objectives of the study and the targeted sample when determining which data collection approach is most appropriate.

Those interested in this topic should personally review these studies. To find them, consult the “Reading Room” at the QRCA web site (www.qrca.org) for tapes of presentations made at QRCA conferences, back issues of VIEWS, and references to non-QRCA articles (anticipated launch date of the latter: Fall 2002). In addition, refer to Quirk’s and other market research journals.

METHODOLOGY QUESTIONS

What online techniques are available to allow collaborative efforts between online quantitative studies and online focus groups?

- It is possible to use respondents' answers to online quantitative surveys to generate participants for an online focus group. In essence, the survey serves as the screener.
- Some online focus group facilities can program into the guide in-session exercises, or hyperlinks to exercises, to poll individual responses. The results can immediately be shown to the moderator and observers. In some cases, immediate tables can be generated from this data. However, given the small sample sizes and the absence of representative samples, the results are not statistically projectable, so caution must be used in analyzing the results.

METHODOLOGY QUESTIONS

How do respondents feel about the online experience?

Information on this issue is mostly anecdotal. Feedback from moderators who have asked informal questions at the end of online groups – real-time and bulletin boards – suggest that respondents enjoy participating in online sessions.

To help determine how well respondents enjoy the online session, the moderator can ask about this when wrapping up. Most respondents are willing to share their feelings.

RECRUITMENT QUESTIONS

How do I recruit for online focus groups?

Principles of recruiting are the same as those for face-to-face or telephone focus groups – contact the correct individual, screen for qualifications, invite, and confirm attendance before the group. The main difference is how the respondent is contacted.

Email recruiting. When screening online, there are some important considerations:

- If the potential respondent has not given permission to be contacted via email (opt-in), the message may be considered SPAM and the recruiter can be held liable.
- The identity of the sender should be clearly recognizable, since people often will not open emails from unfamiliar addresses.
- Similar to telephone or mail recruiting, responses to email solicitations will fall over time. However, it is the responsibility of the sample provider to monitor these changes and adapt the sample to reflect these changes.
- Online screeners require programming, which may require additional lead-time and technical support.
- When using recruiting services, it is important to ask them to describe their recruitment steps, review their correspondences with respondents, and establish timelines for each step. Some are new to recruiting and are not familiar with the brick-and-mortar facility policies that many moderators desire.

Telephone recruiting. Sample can be generated by an online solicitation or can come from established lists. When recruiting by phone, email addresses must be recorded correctly and *confirmed* carefully by the recruiter in order to send respondents the URL, instructions, and individual passwords for the focus group.

Email/phone combination. A combination of email and telephone often works well. Confirmation phone calls seem to elicit more commitment from the respondent than email confirmation, although this may depend upon the type of respondents in the study.

RECRUITMENT QUESTIONS

Where do I begin looking for online respondents? Who maintains a panel?

Some sources of respondents are:

- Online focus group facilities.
- Research firms. (Some of these will only use their proprietary panels for their own clients.)
- Online bonus point vendors.
- Sample vendors such as Survey Sampling or Genesys. (These lists may also be used when recruiting by telephone.)
- Client sample from their own databases. NOTE: Respondents from this source should have given the client permission to email them. Having clients send initial contacts directly avoids issues of spamming, but clients must send them out such that recipients do not see the names of other recipients.

There are very few services that cater strictly to online market research recruitment. Whatever the source, it is important to understand how a given panel was assembled to assess your comfort with their database. For instance, "opt-in" email lists are the most preferred because the participants have explicitly given their authorization to be contacted. If the potential respondent has not given permission to be contacted via email (opt-in), the message may be considered SPAM and the recruiter can be held liable. Also, the researcher should be sure to inquire about how often panelists are permitted to participate in research, and how they are incented to participate. Finally, the owner of the panel should be willing to provide typical show rates using their panel.

RECRUITMENT QUESTIONS

In screening individuals to participate in online qualitative research, should we be looking for any special qualifications?

Some specific characteristics to keep in mind when screening are:

- Comfort using computers, e.g. using a self-report scale question;
- Typing/keyboard skills for real-time groups (as reported by respondent);
- Availability and willingness to commit to participate at a specific time (for real-time groups) or to daily participation (for bulletin board groups);
- Minimum computer configurations and/or access speeds if required for a specific project (e.g., high graphics content);
- If needed, availability of/willingness to download plug-ins (e.g., Media Player).

RECRUITMENT QUESTIONS

How do incentives for online focus groups compare to those for face-to-face or telephone groups?

For real-time groups, incentives for both consumer and business-to-business respondents tend to be about the same as face-to-face incentives. As with other methodologies, the lower the incidence of qualified respondents, or the lower the involvement in the topic, the higher the incentive needed to motivate those individuals to agree to participate and to show up for the group.

For bulletin board groups (BBFG), incentive practices are not yet well defined; incentives will depend on the type of respondent, the time commitment involved, and sometimes the interest the respondent has in the topic. Though BBFGs require a greater time commitment than either face-to-face or real-time online groups, respondents can participate at their convenience, so incentives are often comparable to these other modalities, and can even be lower than incentives for comparable face-to-face groups.

Companies that recruit from their own panels may have their own incentive plan in place and the incentives offered may be lower than incentives offered to respondents recruited from other sources.

RECRUITMENT QUESTIONS

What is the “right” size for real-time and bulletin board groups?

The number of respondents can affect both the length of time required to cover the research topics and the depth to which these topics can be explored. The needs of a given project will determine the “right size” of the groups. Many qualitative researchers feel that having 7-9 respondents (for a real-time group) makes it easier for the moderator to manage, observers to follow, and participants to build a relationship. However, others have successfully conducted groups with as many as a dozen or more respondents, especially when quick feedback rather than more exploratory discussion is the objective of the research.

Larger groups are usually recruited for a BBFG because respondents have more time to read and post. The larger size also encourages a fuller discussion of the issues. Again, the complexity of the discussion, the number of days, and the topic of the board will be factors to consider in determining the appropriate size. BBFGs have been reported with as many as 25 or more and as few as 8 participants, although most seem to be in the 15-20 range. BBFGs are relatively new and the uses of this modality are still being developed; the size of BBFGs can vary greatly depending upon the objectives of the research. Generally speaking, with more participants, the more the postings, the higher the potential for information overload, and the possibility of reduced interaction among participants.

RECRUITMENT QUESTIONS

How are online groups scheduled to accommodate time zones?

Time zones do not need to be considered for bulletin board focus groups because respondents can access the bulletin board at their convenience. Specifying the moderator's daily "posting" time for new questions allows participants to plan and schedule their participation accordingly. The bulletin board focus groups provide the moderator with the ability to accommodate worldwide respondents in a single board.

For real-time groups, time zones can affect participation. Evenings are still the most popular with consumer groups, but depending on the targeted population, daytime groups can also work well. It is important for each respondent to be informed of the start time in his/her time zone (for example, 6:00pm EST translates to 3:00pm PST). If respondents are asked to log on early (10-15 minutes), quick phone calls can be made to those that have not shown, and the extra few minutes will give the respondents time to become familiar with the environment and/or resolve technical problems without delaying the group.

Care must be taken when planning real-time groups that include international respondents distributed over a wide range of time zones.

RECRUITMENT QUESTIONS

What kind of show rate can I expect with online focus groups?

Many variables will have an impact on the show rate in online focus groups:

- The type of respondents being recruited;
- The recruitment method employed (online, phone, or combination);
- The subject matter of the research;
- The sample source;
- The frequency and method of reminders;
- The time of year;
- The time of day the groups are scheduled.

For typical consumer groups that have been recruited *solely* online and *confirmed* online, show rates are generally lower than for face-to-face groups; for 8 participants, it is suggested that at least 16-20 be recruited and sometimes more if respondents will come from low incidence groups. Some researchers have found that response rates tend to be higher when telephone confirmations are made and are more similar to response rates for in-person groups.

RECRUITMENT QUESTIONS

How do I make sure the respondents are who they say they are?

Cheaters are potential problems in online research just as they are in face-to-face or telephone groups and can be handled similarly. There are a few techniques moderators can use to try to avoid unqualified participants or to handle them in the group:

- Some moderators re-screen participants with key questions from the original screening process that only the real respondent would know the answer to, such as the name of their high school or their pet's name. Some facilities also offer customized re-screensers for this purpose.
- Some researchers prefer not to send the URL or password to the respondent too early (no more than 1-2 days prior to the group), feeling it gives respondents less time to pass this information along to "substitute" participants.
- Telephone confirmation and re-screening can also help to some extent. Key questions are asked during telephone re-screening as well as prior to allowing participants into the group.
- If a respondent does not seem to be qualified, the moderator can send a private message to the respondent (if the software has this capability) and ask them qualifying questions; if necessary, it is generally simple to remove them without interrupting the flow of the group.

VIRTUAL FACILITY QUESTIONS

What features do online focus group facilities offer and how do they compare to one another?

The similarities are greater than the differences. Here is a general overview:

Most facilities:

- Have the ability to show visual stimuli;
- Have session tech support for both real-time groups and BBFGs;
- Enable the moderator to send a private message to a participant;
- Have immediate access to transcripts;
- Are very accommodating to help first timers through the process;

Many facilities:

- Have a feature that allows a moderator to remove a respondent;
- Allow observers to view sessions and may also allow observers to “talk to” the moderator unbeknownst to the participants;

Some facilities:

- Have an email broadcast feature that allows one message to be sent simultaneously to the entire participant population prior to the group or during the group – this feature can be used to send out invitations or participation reminders;
- Offer moderator technical training and client demos;
- Have virtual waiting rooms for respondents;
- Are designed specifically for market research purposes;
- Offer sidebars with a range of emoticons and pre-set emotion statements to facilitate rapid communication;
- Offer recruitment services;

A few facilities:

- Offer discussion guide uploading capability for real-time groups (this feature allows the topic guide to be uploaded directly from an electronic file such as Word or Excel);
- Offer re-screening at group time.

Costs vary from facility to facility. Some facilities have inclusive fees (e.g., tech support is included in the rental price) while others break out charges for different components.

VIRTUAL FACILITY QUESTIONS

How secure is the online environment?

Most facilities have designed their software to provide password protection for participants and observers; this helps to prevent uninvited participants from entering the virtual facility. Some facilities claim to have the ability to protect visual concepts through print screen security measures. If contents (visual or descriptive) are highly confidential, it may not be worth the potential risk of compromising the intellectual property being tested.

MODERATOR REQUIREMENTS QUESTIONS

How can a qualitative researcher determine if he or she is personally suited for online moderating?

Many of the online focus group facilities offer hands-on demonstrations of their software, which will give a new moderator a feel for the online environment. It is possible to try moderating a few groups, either in an online facility or with friends in a public chat room (for minimal or no cost) to experiment with the technology. Moderators who do not feel comfortable with the fast movement of real-time chat rooms, multi-tasking, or computer technology in general, may not find real-time groups to be a good fit. They may, however, find they are comfortable moderating BBFGs, which do not have the same time pressure as real-time groups. The pace of BBFGs is slower, the need to multi-task through the course of a BBFG is not as strong, and technology issues seem to be less prevalent and can be dealt with offline.

MODERATOR REQUIREMENTS QUESTIONS

How important are the keyboard skills of the moderator?

Keyboard skills can help or hinder the moderator's ability to probe “on the fly” in a real-time group. With the availability of facilities that offer pre-loaded discussion guides and generalized probes, slow or inaccurate keyboard skills are becoming less of a liability to an online moderator. Still, clients can be demanding, changing questions and adding probes during your group. Also, an unforeseen (though valuable) change in direction by a group can put pressure on the moderator to adjust accordingly by scrapping the pre-loaded guide and moderating entirely “on the fly.” Here are some suggestions that moderators find helpful for those who fear that their keyboard skills may not be adequate:

- Using a typing assistant during real-time groups when still getting used to the online medium;
- Observing an experienced online moderator before conducting their first online group in order to get a feel for the pace and dynamics involved.

GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)

How is the discussion guide handled in online focus groups?

Some online focus group facilities allow the moderator to pre-load the discussion guide, eliminating the need to cut and paste questions during the real-time discussion (or manually type in each question during the group). While spontaneous probes and new questions can be added during groups, the fast-paced demands of a real-time discussion means that typing questions entirely from scratch or rewording existing questions is an inefficient use of a moderator's time. For BBFGs, discussion guides are always preloaded; some facilities also permit the moderator to schedule posting times in advance. Editing questions in BBFGs can be quite seamless because the group is not running in real time, and unposted questions can easily be modified based on responses.

GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)

How candid are participants in online groups?

Researchers have anecdotally reported that:

- Respondents tend to share candidly and are willing to offer negative or controversial feedback (“*This ad sucks*”).
- Because of the amount of time it takes to type responses, real-time participants generally do not mince words or go on at great length, thus opinions tend to be expressed bluntly.
- Most respondents compose and post their answers before reading others’ postings allowing minority opinions to be expressed.
- In BBFGs, respondents have the luxury of taking more time to express their point of view carefully and completely.

GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)

How do spelling errors affect respondents' participation?

At the onset of the online focus group, the moderator should inform respondents that everyone makes typing errors (including the moderator) and they should not be concerned. Express and reiterate the importance of the participants' answers and the need for them to keep up with the flow and speed of the discussion, rather than their grammar or spelling. Many respondents will correct their own typing errors if they feel their answer could be misunderstood. It is the moderator's responsibility to clarify any difficult-to-understand responses that may be critical.

GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)

How can stimuli be presented in online research?

Stimuli can be presented in most of the online focus group facilities, with one of two options available:

- A whiteboard, which is a separate window usually appearing above or next to the chat stream;
- A new browser window spawned on the respondent's desktop.

Active web pages, visuals, print ads, text statements, surveys/polls, streaming video, and audio clips can be presented with both options.

When using the whiteboard for visual images, respondents may need to scroll up and down or sideways to view the entire image. When spawning a new window, respondents are taken away from the discussion. It is important to give them clear instructions about what is expected of them and how much time they will have before the moderator closes the window.

During a BBFG, live web pages pose no difficulty at all since respondents can spend as much or as little time as they choose without affecting the pace of the board or the dynamics. However, even with a BBFG it is important to provide a clear set of instructions on what participants are expected to do.

GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)

Are projective techniques possible in online groups?

Recent research has provided evidence that many projective exercises are adaptable to the online environment. Some examples of successful techniques used include:

- Sentence completion;
- Thought bubbles;
- Metaphors;
- Role-playing.

Some projective techniques that are currently challenging to use online include certain paired activities, collages and drawing exercises. However, homework assignments can incorporate a projective exercise and can be later be presented by the moderator in the group. For instance, respondents may be asked to put together a collage and scan it in and email it to the moderator some time before the group is to be held; respondents can also go to some place like Kinko's to have the stimuli scanned, or they can send the stimuli by regular mail to the moderator for scanning; the moderator presents these collages to the group for further discussion.

GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)

How can an online moderator compensate for the absence of body language and auditory clues?

Respondents in the online environment intuitively know that they cannot be seen or heard, so they develop different ways of communicating. They generally use stronger language and freely agree/disagree with each other. Participants may carefully select words to make a point or use punctuation and capitalization for emphasis. They may use tools such as "emoticons," either simple ones such as happy/sad faces, or elaborate ones built into some software platforms, to more fully express themselves. Some chat-savvy participants may use abbreviations such as "LOL" (laughing out loud) or "##!!!**&!" to express their reactions. It is key for the moderator to learn to understand how respondents express emotions in the online environment.

GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)

How do moderators minimize interruptions/distractions, or deal with non-responders and/or disruptive respondents?

It is impossible to keep a respondent from receiving interruptions when they are sitting at a keyboard and monitor in another location. In general, researchers have not found this to be a problem in real-time groups – in fact, respondents that have to step away for a minute will often excuse themselves and announce when they have returned. Respondents have the ability to scroll back to read what they have missed, then rejoin the discussion. It is unlikely that distractions will affect the group because the moderator and other group members are not typically aware of the distraction. Keeping the discussion engaging is possibly the best way to keep the attention of the respondent.

For respondents who are not participating, seem distracted, or are disruptive, the moderator can use the private chat feature (found in most platforms) to sort out the problem. If all else fails, disruptive respondents can be removed from the group. The remaining respondents will only see that the respondent is no longer there. Some may wonder what happened but in most cases participants seem unaffected.

GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)

If a dominator surfaces in an online group, what techniques can be utilized to manage their participation?

If a dominator surfaces, the online moderator has several options:

- Send a private message to the dominator;
- Point out to the group the need for all opinions;
- Probe for the specific reasons behind individuals' agreement to determine if participants are simply agreeing with the dominator;
- Ask for a response from a non-dominator in the group, then let that single response serve as a starting point for further discussion;
- Ask the dominating respondent to be removed from the group, and block his/her further access to the group if needed. (This should be used ONLY as a last resort.)

GENERAL ONLINE MODERATION QUESTIONS (BULLETIN BOARD & REAL-TIME GROUPS)

What duty does a moderator have to disclose his or her race, ethnicity and/or gender to respondents in the context of an on-line study?

In any research project, it is the responsibility of the researcher to ensure that the research is conducted in a way that does not deliberately harm or disrespect respondents. That said, it is the responsibility of the moderator in each study to consider the circumstances and make a decision about whether or not to reveal his or her personal characteristics, depending upon factors such as the topic being discussed, the nature of the questions being asked, the demographics of the respondents, etc. As with face-to-face research, a moderator may choose not to reveal information regarding his or her personal background or characteristics and/or may decline to answer specific questions from respondents on these topics. While the decision in each case is left to the moderator, the prevailing view is that it is unethical to lie about one's personal characteristics (gender, race, etc.). Identifying oneself simply as "moderator," however, would not be considered deceptive.

SPECIFIC QUESTIONS ABOUT BULLETIN BOARD FOCUS GROUPS

How long is a typical bulletin board discussion group?

The most common duration of a BBFG is 3-5 days. However, in some instances a BBFG can last 7 days or more. For instance, getting input on product usage over time may extend the study over weeks or even months.

SPECIFIC QUESTIONS ABOUT BULLETIN BOARD FOCUS GROUPS

How can interaction between respondents in a BBFG discussion be maximized?

Due to the large amount of text that may be generated in a BBFG discussion, respondents may not take the time to read all of the responses posted by other participants. Instead, respondents may choose to answer only the moderator's daily questions. This can effectively turn the group into a set of simultaneous one-on-one interviews without any interaction among participants. If the objective of the BBFG includes interaction between respondents, moderators may need to be creative in stimulating interaction among participants if they are not self-motivated to do so. Here a few techniques which moderators have found helpful:

- Directing respondents who are not interacting to a particular posting(s) with language like "David, why don't you tell Susan how you feel about..."
- Avoiding closed-ended questions or questions that require brief answers – the idea here is to generate dialog interesting enough for others to comment on.
- Avoiding verbal cues that could be interpreted as a closing to a thread.
- Telling respondents at the outset that their participation requirements include interaction with other respondents, and reminding them of this requirement during the life of the bulletin board, as necessary.
- Posting encouragement such as: "In the question above, what one or two ideas by your fellow participants did you find most interesting, and what makes those most interesting to you?"

SPECIFIC QUESTIONS ABOUT BULLETIN BOARD FOCUS GROUPS

What are some ways to keep attrition rates down for a BBFG?

Because message boards last for several days (or longer), there are increased chances for respondents to drop out over the course of the discussion. To maintain high levels of involvement by all participants through the entire BBFG, the researcher can do any of the following:

- Clearly define expectations for respondents' participation before the onset of the group;
- Keep the topic lively with thought-provoking questions; craft questions that encourage discussion of diverse opinions, and, when appropriate, include use of projective techniques, free association and/or problem solving;
- Send email reminders and/or a tickler of "Today's Topic" to remind respondents of their promise to log on daily;
- Provide follow-up probes several times a day – this helps to emphasize the moderator's presence;
- Encourage all opinions and express appreciation for participation especially at the end of each day;
- If the feature is available, send email notification to respondents when their posting has received a reply – this may be effective in getting BBFG respondents to return frequently and read others' postings.

SPECIFIC QUESTIONS ABOUT REAL-TIME ONLINE GROUPS

How long is a typical real-time focus group?

Online focus groups generally run 90-120 minutes. Respondents are reading from a computer screen continuously and tend to get fatigued if the session is much longer. Fatigue sets in for moderator and observers as well. However, when respondents are highly involved in the topic they sometimes want to stay even beyond the promised time. Scheduling groups with a 30-minute break in between groups will help if a group runs overtime. This extra time will also allow the moderator a short break and give the project team a chance to do a quick debrief.

SPECIFIC QUESTIONS ABOUT REAL-TIME ONLINE GROUPS

How can a moderator maintain active respondent participation throughout a real-time online group?

The moderator can do several things to generate enthusiasm and encourage participation. These include:

- Animated waiting room conversations;
- Interesting warm-up exercises;
- Making use of the stimuli presentation area, and varying the visual stimuli;
- Use of humor, encouragement, emoticons, and punctuation;
- Relevant subject matter and engaging exercises;
- Directed inquiries to specific individuals.

Enthusiasm and participation varies from respondent to respondent. Some moderators use a screening question and/or waiting room discussion to gauge a potential respondent's affinity for the topic as well as their ease of communicating online.

SPECIFIC QUESTIONS ABOUT REAL-TIME ONLINE GROUPS

With real-time groups, what can be expected regarding respondents' posting speed and how can the moderator best manage the flow?

Posting rates vary during a group because of respondent typing skills, the length of responses, server refresh rates, and connection speed. Because of the lag, it is not always necessary to see all posts before moving along; in fact, waiting for all to post may actually slow down the group. Some online moderators use a guideline of waiting for at least two-thirds of the responses before moving on to the next question or probe. Respondents should be given enough time to read others' postings and any moderator probes before the moderator posts the next question. Moderators establish a rhythm in the group that will suggest when to move to the next question.

SPECIFIC QUESTIONS ABOUT REAL-TIME ONLINE GROUPS

How can the moderator encourage respondents to read others' posts and maximize interaction in a real-time focus group?

The moderator can do several things to encourage interaction:

- Set expectations in the upfront Ground Rules;
- Acknowledge postings by individuals;
- Ask probing questions such as “What do you all think about...?”
- Ask follow-up questions;
- Immediately acknowledge compliant behavior, particularly early in the group;
- Leverage relationships developed in the Waiting Room.

It is impossible to tell if respondents have read all other respondent postings, but it is safe to assume that they have read a good portion of them if they are agreeing/disagreeing with others or adding to other participants' comments.

SPECIFIC QUESTIONS ABOUT REAL-TIME ONLINE GROUPS

What special skills are needed for moderating real-time online focus groups?

Experienced online moderators advise novice online moderators to pay attention to the following:

- Extra thought should be put into writing the discussion guide to eliminate potential misinterpretation of the questions; pre-testing the questions helps to make sure questions are being interpreted as intended;
- Probing questions should be phrased to encourage responses from all respondents;
- Good keyboard skills are crucial if the moderator intends to conduct the group personally. However, concerns about typing speed can be alleviated by hiring a keyboard assistant;
- Some familiarity with chat room culture/slang can be helpful, such as “k” for okay, “brb” for be right back, “LOL” for laughing out loud;
- Comfort with and ability to multi-task is crucial, since the moderator will often need to communicate with clients and/or technical support staff while simultaneously conducting the group;
- There are always potential technical complications and moderators need to understand what actions to take (e.g. everyone, including the moderator is bumped off the Internet);
- Creating a strong relationship with the technical assistant prior to the groups.

ANALYSIS QUESTIONS

Are special analysis techniques needed for online groups?

No. Generally speaking, the qualitative researcher will call upon the same analytical processing skills s/he always uses.

Transcript use in analysis will vary from researcher to researcher depending on preferences and client needs or expectations. With transcripts from online discussions, the “speaker” of every comment is included in the transcript, enabling analysis by individual respondents.

In addition, transcripts are generated immediately and can be reviewed while the group is fresh in the researcher's mind, which some find helpful. BBFGs usually generate a large amount of text, which may require additional reading and analysis time as compared to real-time or face-to-face groups. For some studies, it may be appropriate for a researcher to summarize findings for the group each day or at the conclusion of a particular topic; this can also help those respondents who do not dutifully read all posts by other respondents.

CLIENT MANAGEMENT QUESTIONS

Can clients view or observe the group? To what extent can clients communicate with the moderator?

In most virtual facilities, a virtual observation room makes it possible for clients to remain “behind the mirror” while observing the research. In some facilities, clients can chat with other clients and can send private messages to the moderator, unseen by respondents. Because clients can overuse their ability to send messages to the moderator, it is important to establish protocol with clients regarding private messaging during a real-time online session. Using an assistant or designating a lead person to filter client probes can be helpful. This approach will help to limit distractions to the moderator while retaining the ability to respond to clients and keep the research on track. Given the reduced sensitivity to time, filtering is less important during BBFGs.

CLIENT MANAGEMENT QUESTIONS

How can I prepare my client for their first online group?

Clients' first-time experiences will be more satisfying and productive if the consultant can prepare them for what to expect, for example by providing a demonstration some time before the actual group. Included in client preparation should be an explanation that real-time online focus group discussions can be fast and that clients will need to stay focused to keep up.

In addition, to prepare clients it helps to highlight for them some of the differences they will experience compared to other types of groups:

- All respondents answer nearly all questions;
- Respondents in real-time online groups typically post their answers before seeing others' postings;
- All key client personnel can be involved since there is no limit to the number of clients that can observe;
- Instant messaging can make communication with the moderator simpler and more immediate (to stay focused on the respondents, the moderator should consider assigning a gatekeeper and/or limiting observer communications to the moderator during the group);
- If necessary, telephone contact between the moderator and client is possible.

FINANCIAL CONSIDERATION QUESTIONS

What are the cost components of an online qualitative project?

The cost to a client for either real-time or bulletin board online focus group research will have the same components as other qualitative research approaches: study design, recruitment, facility rental, moderation, incentives, analysis and report writing. There is no travel cost or time for moderator or observers. Also, transcripts of sessions are typically included in the rental cost. Of course, recruitment costs will be partially driven by the number of recruited respondents, which can vary by methodology as well as unique project specifications.

BBFGs can generate substantial information, and it is prudent to consider the additional time that may be required to read through and analyze this data when pricing a BBFG.

GUIDELINES FROM OTHER RESEARCH ORGANIZATIONS

Have any organizations developed policies and guidelines for online qualitative research?

While QRCA has not adopted a formal online research policy or set of guidelines, several other industry organizations have such policies posted on their Web sites. The links that follow will direct you to those policies so that you can explore them on your own. The policies or guidelines developed by these organizations relate to the designing and executing of what they consider to be ethical and legal research. While all of these guidelines cover the realm of online research, several tend to be more geared toward quantitative, rather than qualitative, research. We recommend that you acquaint yourself with these policies and determine what aspects are relevant to you.

Keep in mind that the QRCA has a Code of Ethics and a Guide to Professional Qualitative Research Practices. These guidelines, where appropriate, still apply.

Council of American Survey Research Organizations (CASRO)

<http://www.casro.org/faq.cfm>

This document takes the form of an FAQ (Frequently Asked Questions) about online market research, and functions more as a “how-to” than the other documents listed here. It is geared more toward individuals and companies conducting quantitative research, but there are some points about qualitative research. Additionally, some more technical questions about recruiting, cookies, servers and so forth are addressed. CASRO also incorporates some elements of online research into their Code of Standards and Ethics for Survey Research at <http://www.casro.org/codeofstandards.cfm>. If either of these links has expired, please visit the CASRO home page at <http://www.casro.org>.

World Association of Opinion and Marketing Research Professionals (ESOMAR)

http://www.esomar.nl/guidelines/internet_guidelines.htm

This comprehensive document contains guidelines for respondent protection. As such, topics include respondents’ rights to anonymity, privacy policies, data security, as well as guidelines on interviewing young people.* Note that this document is co-written with the Advertising Research Foundation (ARF), and is endorsed by the International Chamber of Commerce (ICC) and the World Federation of Advertisers (WFA). If this link expires, please visit the ESOMAR home page at <http://www.esomar.nl>.

* Please note that laws regarding interviewing children online vary by country. For the US only, see COPPA resources. For other countries, check your local laws.

American Marketing Association (AMA)

www.marketingpower.com

MarketingPower is the online portal from the AMA. There is a “Best Practices” area of the site that contains articles about best practices in a variety of marketing areas, including market research. Currently, there are two articles about the best practices for online research, although the site requires users to register (for free) before reading those articles.

Interactive Marketing Research Organization (IMRO)

<http://www.imro.org/code.htm>

This organization is specific to Internet research, and therefore their only Code of Ethics covers interactivity. Topics covered include sampling and recruiting for both qualitative and quantitative research. Also includes a link to a helpful summary of the 1998 Children’s Online Privacy Protection Act (COPPA). If this link expires, please visit the main IMRO home page at <http://www.imro.org>.