

Integrating New Tools into the Research and Insight Mix

- Utilising Web 2.0



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30th January 2008

5th Annual
Retail Financial Services
Research and Insight 2008

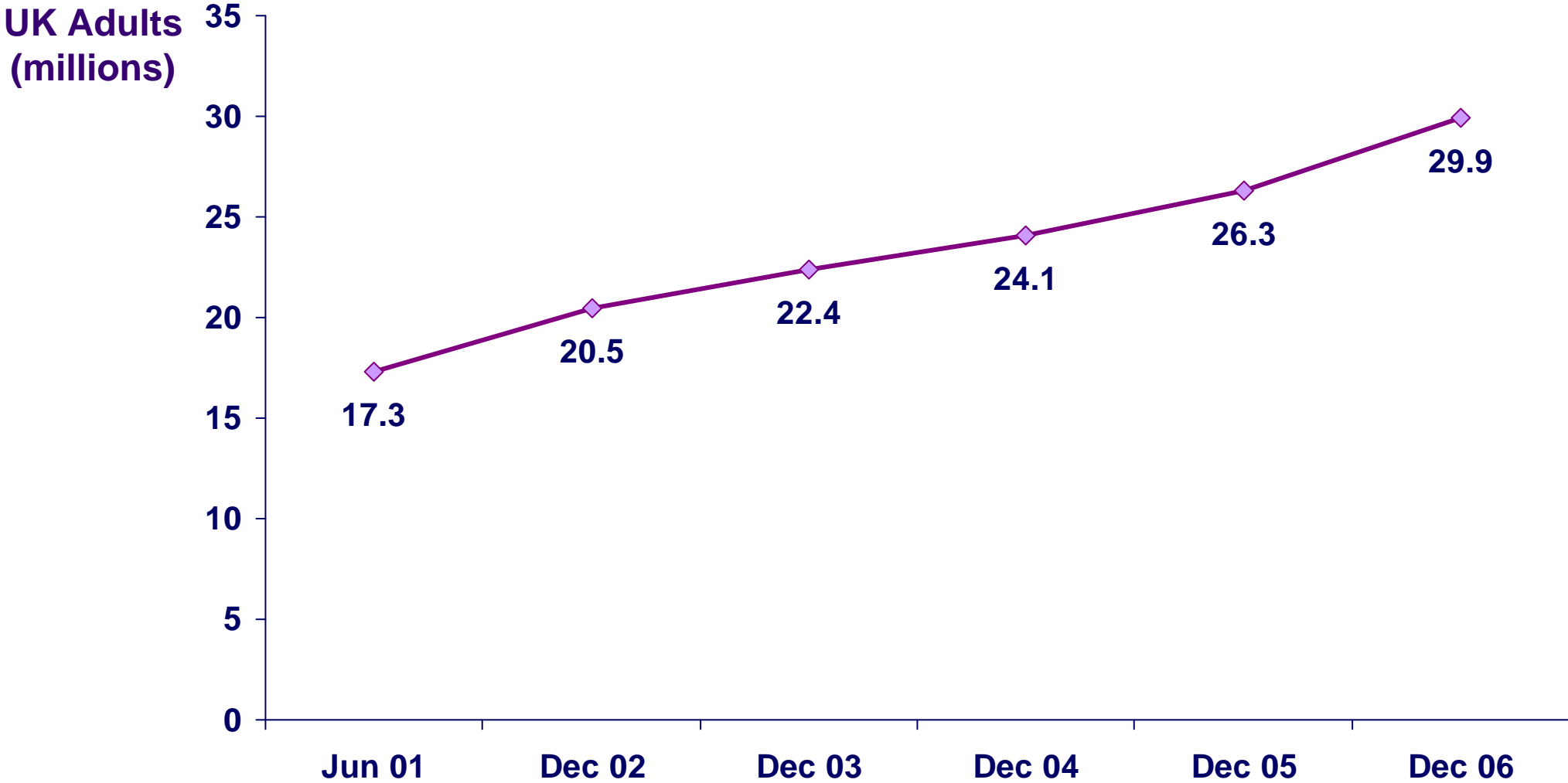


The researcher's expanding toolbox

- Technological advances and changing consumer behaviour and lifestyles in the last 30 years have been reflected in the broadening of research methodologies that are now available to the researcher:
 - telephone interviewing
 - face-to-face interviewing using laptops (CAPI)
 - SMS messaging
 - on-line interviewing
- All have achieved the status of credible, proven tools within the researcher's repertoire



UK adults using the internet during the last 4 weeks

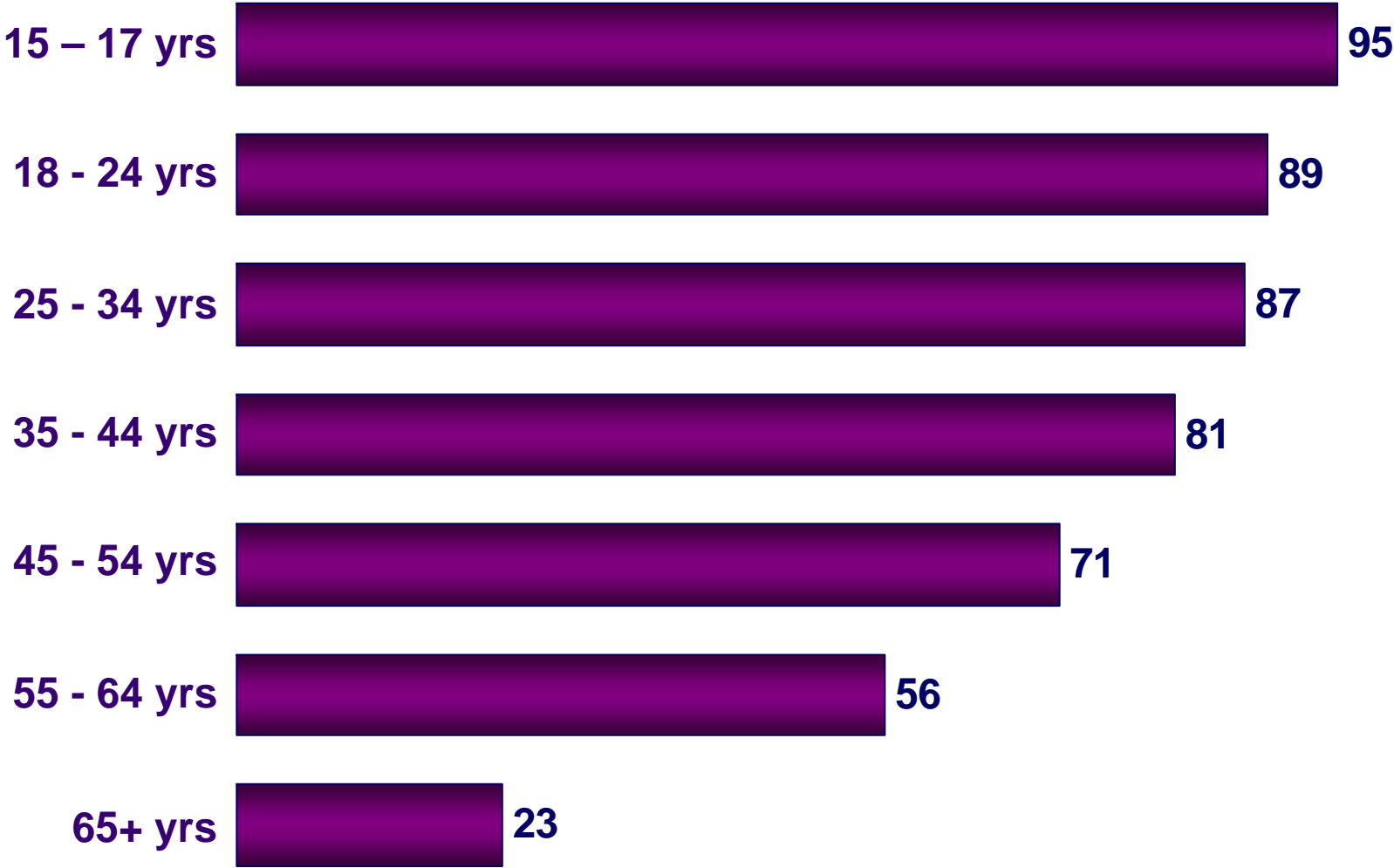


Base: Adults aged 15+ years
Source: GFK/NOP, December 2006

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% of UK adults using the internet in the last 12 months



Source: GFK/NOP, December 2006



Overcoming resistance to change

- There is an inherent conservatism in many market sectors regarding the adoption of new research methodologies
 - not all sectors are 'leading edge'
 - concerns regarding reliability and representativeness of data
 - continuous tracking studies tend to mitigate against the use of new approaches
 - many potential users adopt a 'wait and see' attitude
- Each method has its benefits and drawbacks and it is the duty of the researcher to recognise these and take them into account when selecting the relevant approach
- BUT: no method is totally infallible and without potential drawbacks



On-line Research: Shifting perceptions

- In its infancy, on-line research was viewed with some suspicion by many researchers
- Initial concerns focussed upon the relatively small numbers of potential respondents who (at the time) were available on-line, and the degree to which their views were representative of the population as a whole
- Consequently, many of the early on-line studies were conducted among niche, rather than mass-market, audiences
- These concerns echoed many of the reservations that had been held regarding telephone interviewing 20 years previously
- However, the explosive increase in the on-line population has now placed internet based research into the mainstream



On-line research: Benefits vs. Drawbacks

Benefits

- Speed
- Cost effective
- Can access minority audiences
- Relevant to contemporary lifestyles
- Accuracy of questionnaire filters
- Allows use of interactive prompts - m-pegs, j-pegs, etc.

Drawbacks

- Representativeness of response
- Under-representation of some sub-groups within the population
- Data quality: flatlining/respondent fatigue
- No interviewer to clarify responses / probe for further detail
- Over-use of panels for minority audiences
- Emergence of 'professional' on-line respondents ?



On-line research: Some words of caution

- On-line research should be treated in the same way as any other form of fieldwork methodology: it is necessary to recognise its strengths and weaknesses
- An on-line approach is not the solution to every problem
- The emergence of on-line communities has raised consumer expectations as to the role that the internet can perform in their lives:
 - an integral part of their social networking
 - allows the exchange of views and debate
 - has a 'fun factor' that engages users
- Accordingly innovative research tools and technologies are needed to ensure respondents are engaged and motivated by allowing visual and interactive experiences to become an integral part of surveys

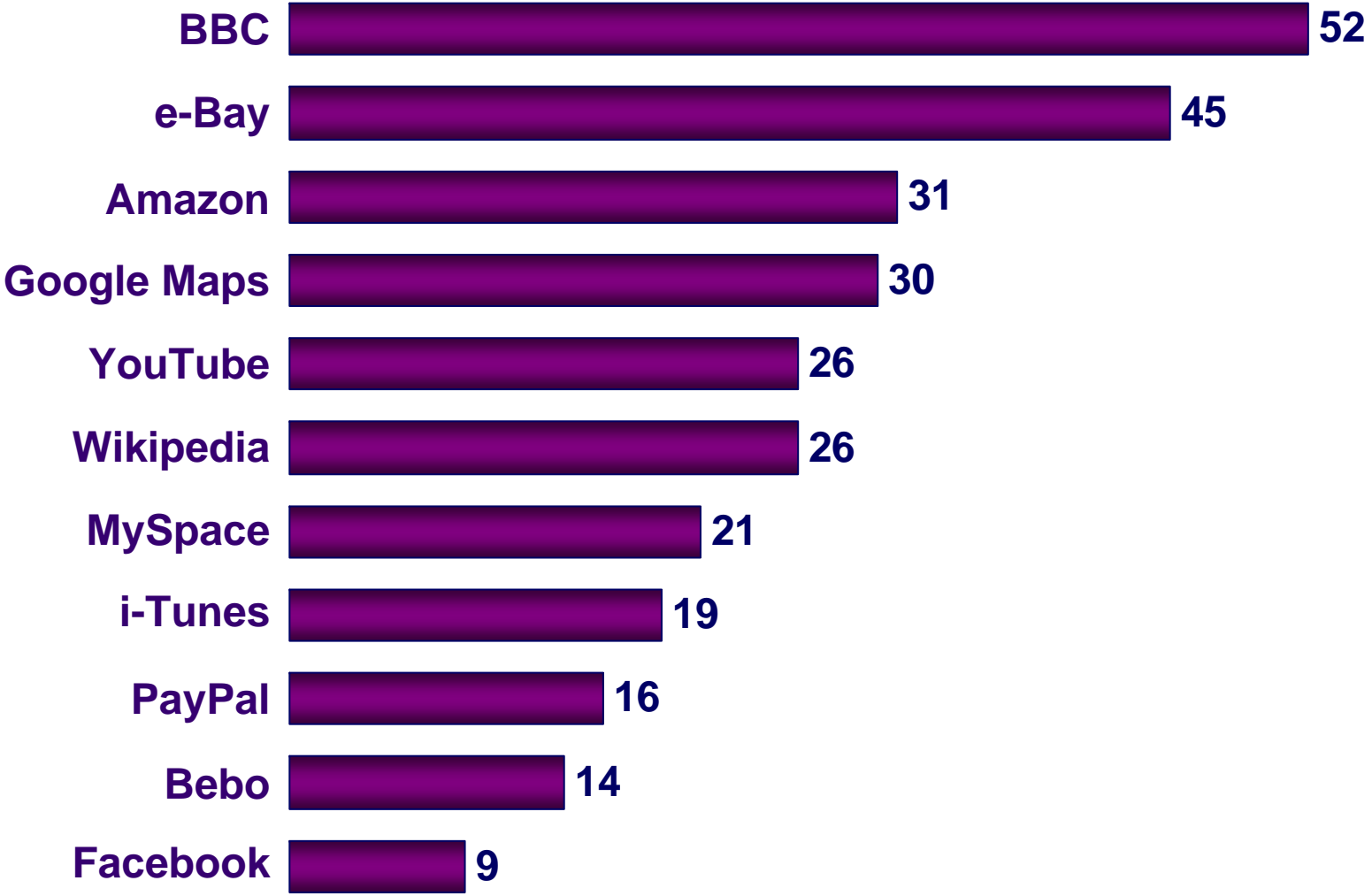


Web 2.0

- A term first used in 2004 by O'Reilly Media
- Consumers are actively involved in their on-line experience by contributing their own content, rather than simply downloading what is already available
- This has been reflected in the emergence of social network sites: MySpace, Facebook, YouTube, Wikipedia, etc.
- These are not niche sites for minority groups: their rapidly-increasing levels of use reflects the extent to which social network sites are now reaching all sectors of the population
- The business potential and value of these networking sites is reflected by recent takeovers:
 - MySpace: \$580 million (by News Corp, July 2005)
 - YouTube: \$1.65 billion (by Google, October 2007)



Sites visited by UK internet users in the last 12 months



Source: Gfk/NOP, December 2006



Web 2.0: The possibilities

- Web 2.0 affords many new possibilities for researchers:
 - blogs
 - ongoing interaction with respondents
 - the sharing of individual experiences
- These are consistent with respondents' motivations for participating in research:
 - they want to express their opinion
 - they want to believe that their opinion can influence decisions
 - they prefer to express their opinions in their own terms, rather than within the confines of a structured questionnaire



Web 2.0: The potential drawbacks

- Amid the hype and publicity, it should be recognised that, as with all other research methodologies, there are some drawbacks regarding these methodologies:
 - avoid the ‘Emperor’s New Clothes’ syndrome
- Issues of quantity vs. quality
- Blogs can generate huge volumes of raw material, but:
 - how can this be analysed effectively and efficiently?
 - it may offer little or no insight
 - it may be of poor or questionable quality



Case Study I: Mortgage Applications Monitor



Objectives of the mortgage applications monitor

- Our client required a detailed evaluation of how mortgage applications are processed, from initial application to the release of funds
- Conventional post-transaction fieldwork approaches would be ineffective in this instance:
 - post-event 'halo' would distort recall
 - difficulty in recalling the exact details of an extended application process
 - consequent loss of the granularity of the data
- This study employed weekly feedback from a panel of consumers who were recruited from lists supplied by the client
- All respondents had initiated the mortgage application process within a defined 5 day timeframe (designated as week 0)
- Respondents were incentivised for each weekly interaction, and also received a bonus if they had provided feedback throughout the full application process



Research content

- Given the need to maintain respondent involvement and to avoid declining response rates during the 10 wave fieldwork period, it was imperative that a concise questionnaire design was employed:
 - 5 minutes maximum
 - comprised pre-coded rating scale questions on key dimensions
 - overall rating
 - advocacy
 - communications/updates
 - etc.
 - Followed by a verbatim assessment of the previous week within the mortgage application process: what had pleased/displeased them during this time?



What methodology?

- Initially, the monitor was conducted by telephone interviews
- This was effective, allowing tight control of the interviewing schedule, with the opportunity to arrange appointments for the following week
- However, some concerns emerged that the quality of the verbatim feedback was modest, and was possibly being tempered by the presence of the interviewer
- Accordingly, a blog-based approach was introduced for the most recent wave of the project (Autumn 2007)



Client concerns !

- Initial reservations were expressed by the client regarding the suggestion to switch fieldwork methodology
 - internal resistance to any change in the fieldwork methodology
 - impact upon comparability of data?
- However, recognition that each wave of the research programme is effectively a stand-alone exercise overcame these concerns: in practice there is little wave-on-wave comparison of data
- Concerns were also expressed regarding the volume / nature of the verbatim feedback:
 - no interviewer to probe for detail, or to clarify responses
 - a 'free-for-all'
 - potential logistical difficulties in the analysis of the verbatim material
- Would response rates be maintained?



The Results

- Following the initial phase of the on-line approach, it appears that any initial reservations were not justified.
- Response rates (already high) were maintained
- Significant increase in the volume of the verbatim data from respondents, with no apparent loss of quality and insight.
- Clear evidence from the verbatim data that respondents are taking advantage of the new methodology to access their responses from previous weeks, so the verbatims are now being made with reference to a broader context, rather than within a vacuum
- No evidence of any meaningful difference in the ratings and scoring patterns for the pre-coded questions.



Application Progression?

'Application progression' continues it's upward trend, though with more noticeable growth in Week 6

Q11. For each statement that I read out, please give a score between 1 and 10, where a score of 10 means that you think that it totally applies to your own experience of applying for this mortgage, and where a score of 1 means that you think that it does not apply at all.

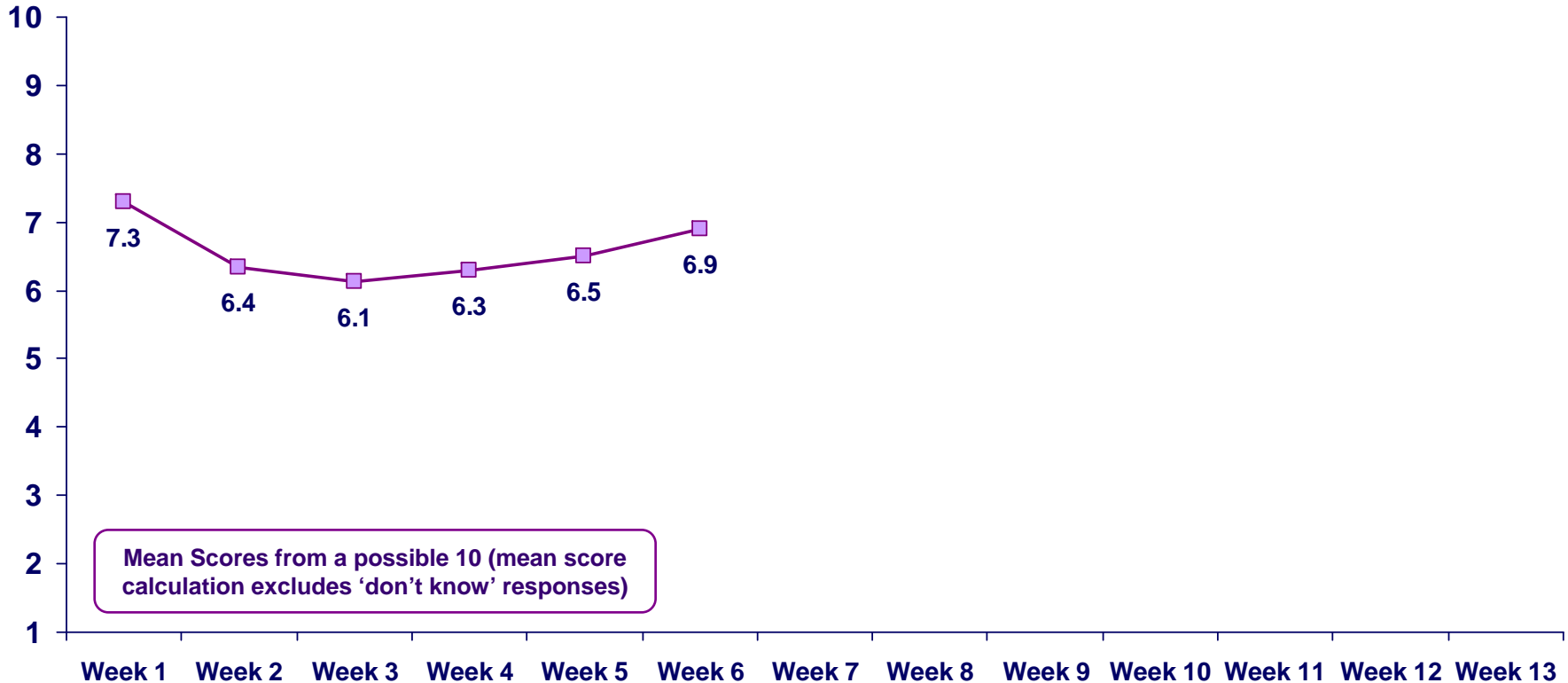
My mortgage application is proceeding at the speed that I hoped it would

Totally Applies To Me

Weekly Ranking

- Wk 1 - 5th
- Wk 2 - 7th
- Wk 3 - 6th
- Wk 4 - 5th
- Wk 5 - 5th
- Wk 6 - 5th
- Wk 7 -
- Wk 8 -
- Wk 9 -
- Wk 10 -
- Wk 11 -
- Wk 12 -
- Wk 13 -

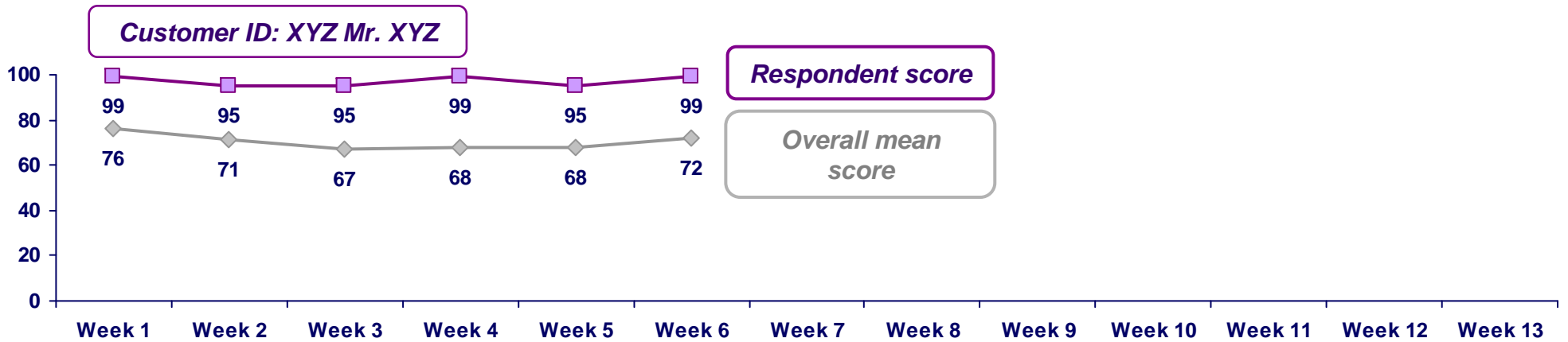
Does Not Apply To Me



Most satisfied customers: Week 6 case study I 5

WEEK 6

Q10. How would you describe your overall feelings towards your XYZ mortgage application at the present time? Please give a score between 1 and 100 (100=totally satisfied, 1=totally dissatisfied)



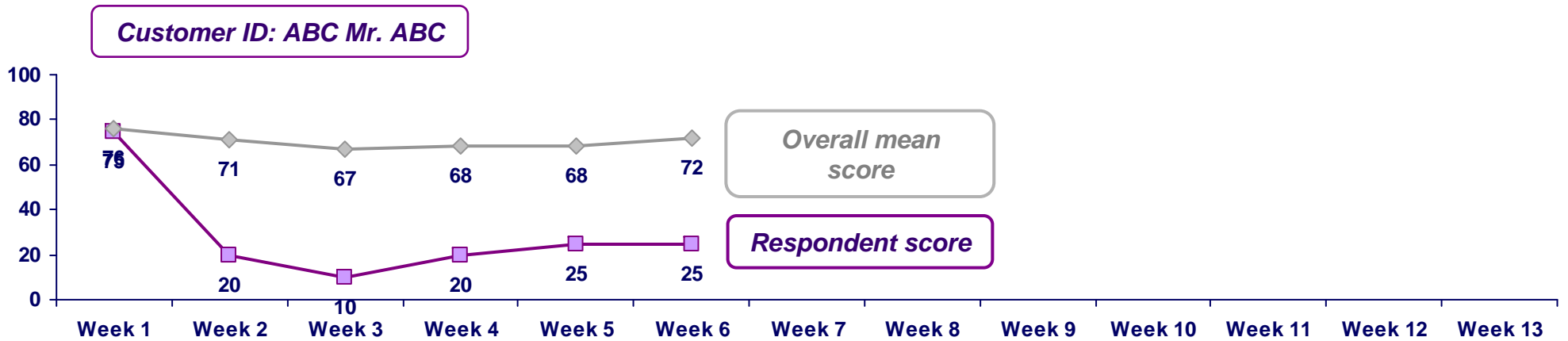
| | |
|---------|--|
| WEEK 1 | <i>"My manager XYZ has been very good, she reacted very quickly when I asked for one detail she emailed me straight away. She has been very good, very proactive."</i> |
| WEEK 2 | <i>"XYZ is quite good at her job, in that she tells me all the information that I need to know."</i> |
| WEEK 3 | <i>"Well I changed the amount I wanted to borrow and I received a reply within half an hour. That was fantastic."</i> |
| WEEK 4 | <i>"I am pleased with the speed of the bank getting back to me."</i> |
| WEEK 5 | <i>"Nothing has happened this week" but service has "matched expectations" and all service metrics were awarded at least 9 out of 10."</i> |
| WEEK 6 | <i>"The fact that they called me at the right time. The time that they said they would."</i> |
| WEEK 7 | <i>To be completed</i> |
| WEEK 8 | <i>To be completed</i> |
| WEEK 9 | <i>To be completed</i> |
| WEEK 10 | <i>To be completed</i> |



Least satisfied customers: Week 6 case study 33

WEEK 6

Q10. How would you describe your overall feelings towards your XYZ mortgage application at the present time? Please give a score between 1 and 100 (100=totally satisfied, 1=totally dissatisfied)



| | |
|----------------|--|
| WEEK 1 | <i>"How efficient one guy was originally. He phoned back when he said he would. It was ABC in the Cardiff branch at ABC. He just did everything he said he would."</i> |
| WEEK 2 | <i>"No one is ever available to help me. No one ever phoned back when they said they were going to."</i> |
| WEEK 3 | <i>"No-one is dealing with our calls. No-one called to tell us that there was some missing information. They are passing our calls from one person to another, and they are giving us different advice."</i> |
| WEEK 4 | <i>"The fact that they never phone us, never get back in touch when they say they are going to and being very helpful when we did call back."</i> |
| WEEK 5 | <i>"ABC not answering information, not being able to give information out, there has just been all sorts. The amount of time taken in the process."</i> |
| WEEK 6 | <i>"Nothing" and "definitely would not" recommend</i> |
| WEEK 7 | <i>To be completed</i> |
| WEEK 8 | <i>To be completed</i> |
| WEEK 9 | <i>To be completed</i> |
| WEEK 10 | <i>To be completed</i> |



Case Study 2: On-Line Focus Groups



On-Line focus groups: Benefits

- No travel required (for both moderator and respondents)
- Simultaneous client viewing is possible
- Can include respondents from different locations within the same group
- Can recruit groups based on minorities without geographical restrictions
- Can play audio/video clips and also show other web-based stimuli
- Can engage with the contemporary social networking generation 'on their terms'
- Provides instant transcripts!



On-line focus groups: Possible approaches

- Possible approaches include:
 - on-line groups
 - moderated e-mail groups
 - bulletin board groups
- All are proven approaches that are text-based. A moderator keys in prompts and stimulus, and participants respond to these by keying in their responses
- The moderated e-mail and bulletin board groups do not require all participants to be on-line simultaneously: extended timeframes (typically several days) can be used. Participants dial in on a regular basis, review the most recent prompts and discussions and respond accordingly
- On-line groups come closest to the ‘conventional’ view of the logistics of a group discussion: all participants and the moderator are on-line at the same time



The role of the moderator

- For those used to conducting groups face-to-face, on-line groups can be a strangely detached experience
- Normal group dynamics do not apply – respondents do not interact in the same way as they would if meeting face-to-face
- Moderator therefore has to work hard to ensure all participants feel engaged and participate fully
- Moderator paranoia – are they all paying attention, is anyone there?
- Difficult to make the assessments of respondents that are possible face-to-face: a verbose respondent may not necessarily be a dominant character. Similarly, a respondent who says little is not necessarily a withdrawn character, just may be more considered in their assessments



Client Concerns!

- Our client commissioned research to refine the specification of a new bank account
- Had some initial misgivings about conducting qualitative research on-line, using any of the possible approaches:
 - loss of interaction between group members and the moderator?
 - loss of more subtle, non-verbal respondent cues
 - do all participants engage in the process?
- Furthermore, timing issues meant that the client was resistant to any approach which did not replicate the 'traditional' approach for group discussions: ie - wanted all respondents to participate simultaneously
- The client also wanted to 'observe' the groups first-hand, at a designated time



Logistics

- The recruitment process was virtually identical to that employed for face-to-face groups, but with relevant questions asked to confirm access to e-mail, software used, etc.
- Some element of respondent briefing was deemed to be necessary: but caution was exercised to ensure respondents were not 'sanitised' prior to the group taking place
- The discussion guide was designed to:
 - be concise
 - be simple and not over-ambitious
 - allow revision/reiteration during the course of the group
- Moderator-client dynamics are different to conventional groups: the client is able to suggest prompts/clarification that would not be possible face-to-face
- Therefore, clear delineation of the respective roles of the client and the moderator was required to ensure that this did not cause any problems!



Lessons Learned

- Although recruitment is obviously critical, the specification of on-line groups can be more flexible than conventional groups.
- Demographic criteria that may be employed to assist group dynamics are less relevant when the respondents cannot see each other.
- The discussion guide must be concise – otherwise the group will over-run and disintegrate
- Similarly, avoid the temptation to use too many prompts – they can disrupt the smooth running of the group.
- It is critical that the moderator has an assistant to administer the prompts etc – it is not possible to moderate 100% effectively while also performing admin duties
- Similarly, the assistant can liaise with the client, if the groups are being observed. Imagine there is a virtual ‘screen’ between the moderator and the client – avoid the temptation for the client to engage directly with the moderator, if possible
- If the client is viewing remotely, this can cause problems – it is more effective if the client is present with the moderator / assistant.

