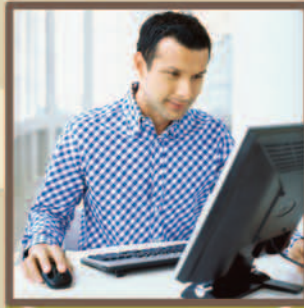


By Isaac Rogers

20120 Research ▪ Nashville, TN

isaacr@2020research.com

Five Tips for Better GLOBAL ONLINE QUALITATIVE



We live in a global economy and think on a global scale.

Other cultures, countries and places beyond our physical reach affect our everyday business decisions. As anyone can attest, the research world is a different place than it was ten years ago. Not only have the Fortune 500's needs for "global" research accelerated, but even smaller brands are looking for a global view on their customers.

Historically, only large, global research firms attempted multi-country qualitative studies. Their worldwide staff and infrastructure allowed them to effectively scope and simultaneously execute a study across multiple countries. Smaller agencies and independent consultants simply did not have the capabilities to meet such demands.

Today, all firms — from the largest research agencies to the smallest independent research shops — have access to powerful tools that allow for easier and faster global research. With online qualitative research platforms, you can now engage participants scattered across the globe without ever leaving the comfort of your office.

While the technology to host multi-national online qualitative projects has advanced, many researchers without global experience still struggle with the logistics and setup required to kick off their first global study. Here are five key tips to help you successfully conduct online qualitative research on a global scale.

#1. Line up your resources.

One of the most daunting aspects of global research is managing a small team of dispersed researchers, fieldwork companies and technology providers. How do you find the resources needed for larger global projects, such as separate moderators and fieldwork agencies for each region?

In-Country Moderators

Two of our favorite recommendations for identifying an in-country researcher are the "Find A Researcher" system on QRCA.org and professional groups on LinkedIn. The QRCA tool is a focused way to identify experienced research consultants, as it allows you to search the QRCA network using several filters — for example, moderators located

in certain geographies and with certain industry experiences. LinkedIn is also a great resource but takes a little more searching. You would be surprised at how many people are in your extended network just by searching for "Moderator France" or "Qualitative Research Russia."

Managing Fieldwork

We often recommend looking for researchers who can both moderate/analyze and manage the in-country fieldwork. This will allow you to have a single point of contact for each country. Your in-country researchers will almost always be your best bet for identifying the best fieldwork firms.

Make sure you line up resources BEFORE the study begins, and communicate the research calendar clearly. There have been many cases where a researcher thought she knew someone in Germany, only to find out that he was on vacation or sick. It is a good idea to keep your global team up to speed on any potential timing changes, since your partners are likely managing their own local projects as well as assisting with your global study.

#2. Stay organized.

While time zones may seem like a small detail, it is one that is often overlooked. Managing a project across various time zones around the world can make even the best researcher want to pull out his hair. One of our most recommended tools is www.thetimezoneconverter.com. It is simple, effective and free to use.

Now that you have timing covered, how do you keep everyone on task and on target? Basecamp (www.basecamp.com) is a brilliant project-management tool that works well for managing a global team. In a few short minutes, you can set up a "team" of remote workers and assign each person a series of tasks to complete. As your global fieldwork partners update those tasks, everyone sees real-time status updates through the online portal. It even creates a shared calendar for everyone involved, and it handles file versions and updates exceptionally well; this is a huge benefit for the ever-changing screener or discussion guide.

It never hurts to double-check your cultural knowledge before dealing with international partners. A fantastic resource is www.culturecrossing.net. This website acts as a cultural knowledge base of business and social norms. With just a few clicks, you can review the basics of communication style, business norms and workplace expectations in a particular country or region. While no resource can capture every regional nuance, this tool does a great job of making the information easy to review and use.

#3. Stay in touch.

It can be tempting to rely on email to keep up with your team; however, sometimes it is best to communicate person to person. Many cultural nuances or research misunderstandings can be negated by conversation. While most of us have used Skype to keep in touch with family and friends, few think to use it to execute great global research. We often recommend that researchers invest in the Skype To Go feature to make international calls to fieldwork partners. It is cheap, easy and even works from your mobile device. Google offers a competing product in Google Hangouts (previously named Google Talk). While much less well known, it offers competitive rates for international calling.

Check with your technology platform provider about pre-session client calls and debriefs. Often, your webcam focus group providers can open up a "debrief line" or client dry run at quite competitive rates; not only does this simplify your technology needs, but it also exposes everyone on the research team to the platform before the study goes live.

#4. Be smart about execution.

Planning and logistics often eat up a huge percentage of the research calendar for a global project, which can leave researchers sprinting for the finish line after all the fieldwork has begun. While it can be tempting to allow your in-country resources to execute fieldwork as quickly as possible, a few tricks can smooth out the process and ensure a greater level of success.

✓ *Test your research design.*

We cannot stress enough the concept of a “test market.” With multi-phase global projects, you can easily build in iterative learning. First, launch your easiest or least risky country as a “test run” of the design. Launching in your home country might make the most sense. Allow your global partners to observe this discussion, and bring everyone together towards the end to review learning and insights. This ensures a couple of things: first, that your in-country moderators have a shared expectation of quality, based on your example, and second, that any kinks in the discussion guide or process can be observed and fixed for other markets.

Set proper expectations.

Make sure that your clients enter into the project with proper expectations. Developed markets like the U.S., Canada and western Europe have plentiful access to the internet, meaning great-quality video streams for live focus groups or high-quality photos from smartphones. In more developing markets, average consumers might not have access to such luxuries, so at times their technical capabilities might limit how they participate. Your in-country fieldwork teams can usually help you understand the local-market capabilities of their participants.

Consider data protection and security.

Do not enter into a research design that assumes that what you will get to know about your participants will be equal across the globe. In countries like Germany and the U.K., you may not have access to as many demographic data points or contact details as you would in countries such as the U.S. and Aus-

tralia. Other regions’ views on personal data protection and security should be a clear consideration when discussing the research objectives with global research partners. If personal information or background data is critical to your project, ensure that information will be available in all markets or that you understand the variations ahead of time. This is especially crucial if your screening process relies heavily on multiple demographic factors.

#5. Have a strong finish.

Translations are often a huge and potentially costly component of running a global online qualitative project. Whether your project is an online discussion (which typically includes 1,000+ verbatims) or an online webcam interview (which includes both transcription and translation), these costs should not be ignored.

If you have not pre-arranged translations with your in-country resources, consider your technology providers for guidance. Today’s online research tools often include built-in transcription/translation capabilities, which are often faster and cheaper than third-party suppliers. You are often presented with a few options, including the ones below.

Machine Translation

This type of translation technology uses sophisticated computer processing to quickly translate content. While this level of translation is fast and cost effective, it is often far from perfect. As participants make typos or use slang or uncommon terminology, the translations become less accurate. Translation fidelity will be high on moderator questions and probes

because your in-country moderators will likely compose their questions with special attention to detail, grammar and sentence structure (making this a great way to keep tabs on your global team). This translation capability should rarely be used for analysis; instead, it is a great way to observe the research occurring in other languages in real time.

Human-Audited Translation

This type of translation comes in a number of varieties, but we normally see human-audited translations sold in one of two categories: general translation or specialist. General translation covers 90% of market research needs, as it relies on the everyday language most native speakers use. Most third-party translation companies, tools like QualTranslate™ and other embedded services often offer this level of translation as a default. Specialist translations are often industry specific, like medical, IT or accounting. Due to the specialized terms in these industries, you need specialized resources. These translations typically cost much more per word (as much as twice as costly) and often take many days to complete.

No matter the type of translation you decide to use, do not wait until the end of the project to figure it out. Be upfront with your clients at the beginning of the research design about how long it may take to deliver final analysis. If you do not build in time for translation, you may be scrambling at the end of your project to deliver.

Final Thoughts

With today’s technology tools and a lot of planning, global projects are now well within reach for most market research consultants. Without a doubt, developing local-market partnerships for moderation, fieldwork and analysis is the most challenging aspect of multi-country research; however, once your resources are in place, having the right tools in your toolkit can give you truly global capabilities. It is an exciting time for qualitative research, as old boundaries are being redrawn, allowing independent researchers and smaller firms to compete on a global scale. 📌

It is an exciting time for qualitative research, as old boundaries are being redrawn, allowing independent researchers and smaller firms to compete on a global scale.