

# The Evolution of Digital Qualitative Recruiting

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*As time and cost pressures drive more researchers to seek faster and cheaper routes for qualitative recruiting, new technologies have recently emerged to fill the demand. Real-time recruiting tools, virtual intercept technologies and even mobile location-based recruiting now provide ways for marketers to better identify and interview respondents quickly and effectively. In fact, early projects/studies have proven to be quite promising.*

Traditional qualitative recruiting is a labour -and time- intensive process, both for the respondent as well as the fieldwork agency. The seemingly simple act of organising a typical research interview is fraught with complexity that's rarely appreciated. We start with our search, looking for needles in the proverbial haystack, sorted from thousands of records from ever-expanding qualitative recruitment databases. We filter potential consumers through a complex phone screening process, asking them to accurately recall specific information about their most recent purchases or describe in great detail their daily habits and practices. Buy toothpaste too frequently? Sorry, you don't qualify. Recently received a raise at work? Sorry, that quota group is full.

Finally, each of these potential respondents must be able to travel to a local facility and spend several hours at a specific time of day next week.

Understandably, the number of consumers willing to undergo this process is shrinking, making the already difficult work of qualitative recruiting that much harder. As the task of enlisting respondents grows more arduous for fieldwork agencies, researchers and end-clients are simultaneously seeking faster turn-around times and decreased project budgets.

The advent of online qualitative platforms provided the industry some much-needed relief. Some of the complexity of recruiting could be alleviated, as respondents can take part in research projects at their convenience, not just ours. Many consumers who could never be coaxed to attend a face-to-face focus group are willing to participate online. As we can now “bring the research to them,” the potential respondent pool has deepened immensely.

However, even with a deeper pool of participants eligible for online qualitative, the sheer labor component involved with traditional telephone recruiting remains a constant; telephone screening takes tremendous fieldwork resources.

Many end-clients are perplexed by the fact that recruiting to online qualitative projects can be just as costly and can take just as much time as traditional face-to-face recruiting. “*But this is online— shouldn’t it be faster and cheaper?*” is a line we hear often. The driving force behind this trend is the radically more complex specifications and massively longer screeners now used in online qualitative as compared to those seen in face-to-face. When the frame of reference shifts from a single focus group city to an entire national population, there is a strong tendency to layer in complex quotas, toss in an algorithm and sprinkle in a few more screener questions to the mix. This level of specificity drives up the cost and extends timelines dramatically.

For traditional qualitative recruiting, the old (and often quoted) adage rings true; Speed, Cost, Quality: pick two.

### **The Evolution of Digital Qualitative Recruiting**

Unsatisfied with the existing qualitative recruiting options, researchers, fieldwork providers and end clients experimented with new digital recruiting methodologies. These approaches have taken many forms, but all aim to reduce or eliminate the cost and time associated with telephone-based screening processes.

#### **Virtual Intercepts**

The term “virtual intercepts” has been borrowed from an existing qualitative approach: the face-to-face participant intercept interview. While not as common a practice as it once was, this simple and effective approach provided a great way to bypass the traditional recruiting process. In shopping centers everywhere, market researchers camped out in food courts and heavily trafficked areas, boldly approaching a potential respondent and offering a cash incentive in exchange for a few minutes of the participant’s time.

The face-to-face intercept approach had a variety of unique advantages. First, we are ***bringing the research directly to the participant***, rather than requiring them to visit us. This allowed us to side-step the tricky process of finding the right respondents who also happened to have nothing planned for next Thursday. Second, we are engaging the respondent ***closer to the point of purchase or experience***. By setting up shop in a mall or near a grocery store, we can capture consumer feedback minutes after they experienced our brand, advertising or in-store encounter.

So what is the modern-day equivalent of a “mall intercept”? Try online — social media, popular media and e-commerce websites, and surveys. With a few of the new digital intercept technologies, we can embed pop-up or in-experience ways to grab the attention of a consumer and invite them to an online

qualitative research project. Using these new technologies, we can closely replicate the benefits of a face-to-face intercept online; hence— a “virtual intercept.”

These new virtual intercept technologies are easy-to-use, embeddable in a variety of online sites and experiences and can redirect respondents to either real-time online focus groups and interviews or asynchronous discussions and communities.

In a recent project, we linked a client’s social media presence to an online real-time webcam interview. The client was interested in understanding consumer responses to a new ad concept. Rather than applying traditional qualitative recruiting methods, the client desired a faster and easier way to engage their customers. With a virtual intercept link, a simple URL was placed on the client’s Facebook page, targeted to those consumers who follow their brand’s online presence. After clicking the link, consumers were presented a short online screening survey; those that passed the screener were brought directly into a real-time webcam interview with the moderator.

During the interview, the respondents were exposed to the new ad campaign, gathered feedback, thanked for their time and quickly ushered out of the live session, making room for the next qualified participant. The whole process took less than 20 minutes, but provided the end-client exactly the type of quick feedback they sought. In a short 4-hour window, the moderator interviewed 15+ consumers. The respondent was paid a small honorarium that was a fraction of the incentive normally paid respondents because the process was so simple and unobtrusive.

A common use for this virtual intercept technology is to link a customer satisfaction survey to an online multi-day qualitative discussion. For example, customers who voice “extremely dissatisfied” responses in a satisfaction survey are then invited to share their opinions in an online forum where a live moderator will hear their concerns and communicate their frustrations to the company. Customers who opt-in to the online discussion might be asked to upload a picture of their broken product/device, or record a webcam answer showing the company just how frustrated they are with the level of service provided.

Virtual intercept techniques are dramatically reducing fieldwork cost and time requirements and opening up whole new areas of research. As more researchers see the benefit of non-traditional recruiting approaches, entirely new opportunities are opened to engage consumers and gather new insights for end clients.

### **Mobile Location-based Recruiting**

Many a phone screener includes the question “How long has it been since you visited a (insert retail store here)?” Consumers must then recall the last time they visited that store and answer a battery of questions about the experience—all based on memory from days or weeks ago.

But what if you could recruit a respondent for a research project as they stand in that exact store aisle? What if those respondents were then available for a quick qualitative interview, or perhaps a more in-depth online post-shopping trip conversation when they get back home? With mobile-enabled research panels, this is a reality.

As more and more panel and recruiting providers are including geolocation in their respondent software, researchers can now push a notification or text message to respondents when they walk into a shopping center or pull up to the auto dealer showroom. On today’s smartphones, we can tap into a variety of

location-based data. Almost all smartphones are capable of broadcasting their precise location to within about 50 meters. Once a respondent enters the target location (called a geo-fence), the notice is broadcast and the participant can join an online webcam-based interview in a matter of seconds. The use of in-store transmitters, such as Apple's iBeacon, provide even greater precision, allowing us to trigger recruiting notices within just 1-2 meters of a specific item in a store.

If these technologies sound like nothing more than theoretical concepts— they aren't. In fact, we've already executed several successful geolocation-triggered projects, recruiting respondents at grocery stores across the U.S. for both real-time and asynchronous online research projects.

### **The Future of Qualitative Fieldwork**

Though challenging, phone-based qualitative recruiting still provides the most proven and reliable method for recruiting to online qualitative research. However, new and emerging high-tech methodologies allow us to circumvent traditional approaches and deliver a low-cost, high-quality recruit with near real-time results. This allows us to turn projects around faster, reduce overall project costs dramatically and even conduct our interviews closer to the desired point of consumer experience.

As these technologies develop from their current niche uses to more widespread application, they will add a whole new set of options to our current fieldwork capabilities. The world of telephone qualitative recruiting will never go away, but these new tools will add a host of options to how we approach qualitative fieldwork.

And today, for many cutting-edge qualitative researchers, these new recruiting methods are already helping to solve the problem of "Cost, Quality, Speed"—pick all three.

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