Is Qual Evolving to Extinction?

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utilizing their interpersonal skills and techniques in face-to-face settings now find themselves behind the technology curve and fearful that they will be shut out by young digital natives. The neat, comfortable market of qualitative focus groups has become a chaotic menagerie of mushrooming methods that sometimes seem impossible to fully comprehend, much less execute.

Focus groups are not dead; they have simply been relegated to also-ran status. No researcher can now blindly equate qualitative research and focus groups. Today's qualitative landscape is highly fragmented, chaotic and confusing. Researchers must be well-versed in many methods and able to adapt different approaches to different scenarios.

This openness to new approaches and methods is the central theme of ESOMAR's Qualitative Conference in Vienna in mid-November. There, researchers will be exposed to new thinking that will help them navigate the rapidly changing qualitative landscape.

In this newly hectic world, Ray Poynter asks, "How do we define what qual is?" It is no longer sufficient to say that qualitative research is simply "focus groups." Nor, is it adequate to define it as "the why behind the what."

We know that qualitative research is evolving. But, is it thriving or dying?

If we take a narrower, more traditional view that qualitative is defined largely by the methods of face-to-face focus groups or interviews, particularly those held in a qualitative facility, then the case can be easily made that qualitative is dying.

However, qualitative research is actually evolving to a more nuanced profession. The blunt instrument of "focus group facility" research is being replaced by a methodological scalpel that cuts with precision and forethought, requiring significant multi-disciplinary expertise. As research designs become more customized and present more contextual understanding, qualitative research will become even more insightful and useful to decision-makers.

From this influx of tools and capabilities is emerging a research profession with far greater capability to provide understanding and insights than ever before. "Voice of the Consumer," "Actions of the Consumer" and even "Emotions of the Consumer" are becoming more evident and better understood. So, researchers have the opportunity to become more valued partners in the corporate decision-making hierarchy because they hold the keys to understanding and success. Qualitative research will thrive in the near-to-intermediate term because it is providing an ever-increasing value to the marketer in terms of actionable insights.

However, qualitative research *as a discipline* is in a long-term decline. In ten years, qualitative research, as an independent profession, will be much smaller than it is today. There are two primary macro forces driving this trend.

First is the advance of technology to deliver more quickly information that meets a minimum threshold of quality and insight. Qualitative research has traditionally been slow, difficult and expensive. Technology is changing that. Focused technology can deliver qualitative information for tactical decisions significantly faster than the typical qualitative researcher. Many qualitative researchers currently work on tactical research for which they will not be needed in a few more years.

Second, text analytics is blurring the line between qualitative and quantitative research. As text analytics improve, the need for human interpretation decreases. Today's text analytics on research is generally inadequate to meet the need. However, analytics improvement will eventually lead to a corresponding decline in the need for human analysts.

Both trends are propelling us toward truly Integrated Research where much qualitative research can be executed, not as a separate discipline, but as an expected skill set for any seasoned researcher. Much of today's phased research featuring a qualitative phase followed by a quantitative phase will be fused into a single research phase with a single researcher/analyst. That researcher/analyst will use the technology at his/her disposal to conduct the research and analysis. The qualitative researcher as we define him/her today will no longer be needed for this work. So, the size of the qualitative profession will contract.

While the above scenario will shrink the profession, the remaining qualitative professionals will be even more skilled and important than they are today. These will be the qualitative experts who are proficient in deep, strategic customer studies that mine insights and apply them to strategic decisions that drive the business. These "qualitative insights consultants" will be even more highly accomplished and highly valued than most qualitative researchers are today.

So, we return to our question, "Is qualitative research thriving or dying?" The answer is an unequivocal, "Yes." The profession is more exciting than ever and is delivering more insights in more ways than before. Technological capabilities will cause a decline in the number of qualitative researchers, but the profession's value will increase. Qualitative research is not evolving to extinction, just to a different place. It will never look the same again.

If you're interested in attending Global Qualitative 2014 from 16 November in Venice, Italy you can find more information and register at **esomar.org/events-and-awards**

About Jim Bryson

Jim Bryson is a Programme Committee member for ESOMAR Global Qualitative 2014 and Founder and CEO of 20|20 Research, a firm that provides both in-person and online global qualitative research software and services. A 28-year veteran of the market research industry, he sits on the Marketing Research Association Board of Directors, has served three terms as President of Qualitative Research Consultants Association and was recently named 2013 Market Research Executive of the Year by Research Business Report

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