

... hybrid research

Seeking some clarity

What is hybrid quant/qual anyway?

| By Jim Bryson



snapshot

Jim Bryson uses case studies from corporate researchers to shed light on the rise in popularity of hybrid quant/qual methods.

Every couple of years, a new buzzword emerges. The industry scrambles to understand whether the newest craze is a can't-miss trend or a hyped-up fad. In the last 10 years, we have lived through the ebb and flow of online research, social media research, big data and mobile trends, among others. With each iteration, the industry buzzes with energy, new companies emerge, conference speakers hone their presentations and market researchers scamper to find ways to integrate the newest method into their proposals.

Currently, hybrid quant/qual research is all the rage. A recent survey indicated that 58 percent of corporate researchers planned to invest in new quant/qual techniques in the next 24 months. This coincides with a growing industry buzz around hybrid quant/qual research, the leading edge of a new era in research. As business-decision lead times continue to shorten and technology further improves researchers' ability to integrate different types of data, the distance between methodologies will shrink and begin to blur, creating faster, more agile research capabilities than we have ever imagined.

We hear researchers discussing hybrid quant/qual at conferences. We talk to clients who say they are using the method – or at least they want to. What is all the hype about?

Because research suppliers all seem to have their own definition of hybrid quant/qual, we decided to take that question directly to the ultimate user – the corporate researcher. We interviewed several corporate researchers by phone and in person and asked them what they considered to be hybrid quant/qual and how they see it differing from traditional research.



quirks.com/articles/2016/20160510.aspx

Why so excited?

For decades, accepted research methodology has consisted of an exploratory qualitative research phase followed by a validating quantitative phase. Isn't this a hybrid quant/qual method? If so, why are so many researchers excited about so-called "hybrid" quant/qual methods?

Our research revealed that there is no consistent definition of the term. Even so, there were some consistencies in the inconsistency.

First, to corporate researchers, hybrid quant/qual does not include the traditional phased approach, defined as focus groups followed by a survey. Hybrid quant/qual means something different. But the definition of "different" is consistently inconsistent.

Second, the term is used as a generic descriptor rather than a descriptor of a particular methodology or technology. The specific methodology any one researcher attaches to the term appears to depend entirely on their experience with any type of non-traditional mix of quantitative and qualitative techniques.

Third, hybrid quant/qual is a term that often serves as a placeholder for any mix of quantitative and qualitative research. These researchers did not make a distinction between hybrid quant/qual and hybrid qual/quant. The terms were generally interchangeable.

As just mentioned, hybrid quant/qual is a generic descriptor for research using a quantitative survey combined with any number of qualitative methods, except focus groups. Any hybrid method that included a survey with focus groups was simply traditional research design and not fitting for a 21st century buzzword.

Surprisingly, several of the corporate researchers we talked with associated hybrid quant/qual with fairly new – but successful – methods they have used to combine ethnographic and quantitative research. They use ethnographies as a qualitative technique to get deeper and more contextual information than focus groups and follow that with a quantitative survey.

We expected to find hybrid quant/qual associated with online quali-

tative since hybrid is often a term used in online method discussions. Among our respondents, that was not the case. Even so, many researchers attributed speed of completion as a primary characteristic of hybrid quant/qual research compared to traditional phased research since it merges the disciplines to eliminate delay and speed the delivery of insights to drive decisions.

So today, hybrid quant/qual appears to be a generic term that is presumed to promise faster research turnaround but its definition and execution is murky at best. We expect this murkiness to clear in the months and years ahead as technology and methods mature, become more integrated and more mainstream.

To better clarify the term, here are three case studies of different hybrid quant/qual approaches that effectively address common marketing problems.

Concept testing. A global cleaning company wanted to introduce a new cleaning product. It used a hybrid quant/qual methodology to marry its existing quantitative concept testing design with the opportunity to go deeper with follow-on qualitative. In this instance, the qualitative methodology selected consisted of 25 Webcam interviews with participants who responded positively to the concept during the survey phase.

Results: The hybrid quant/qual design yielded critical new insights in this case because the original concept was slightly misunderstood. The concept performed well in the quantitative test. However, during the follow-up IDIs, respondents asked questions about the concept that revealed a significant flaw in the design from the respondents' perspective. Based on this information, the design team tweaked the product and the concept to overcome the problem. Because this was a hybrid approach, costs were low as there were no additional recruiting costs and negligible additional incentives. Plus, the follow-on interviews were conducted concurrently with the survey so no additional research time was required for the revealing qualitative portion.

Customer satisfaction problem resolution. A major credit card

company discovered a problem with cardholder services that needed to be understood and addressed. A typical research project to address this issue would require six-to-10 weeks including an RFP, proposal, selection, design, fielding and analysis.

Since time was of the essence, six-to-10 weeks just to complete the research was simply not feasible. The research team decided to adopt a hybrid quant/qual approach using their ongoing customer satisfaction survey. From the customer satisfaction survey, a sample of customers who were dissatisfied with the service were given the opportunity to opt into an online bulletin board discussion. An additional random sample opted in to a different bulletin board discussion starting two days later than the dissatisfied group.

During the bulletin board discussion, both groups talked about the credit card service including the low-performing service in question. After a discussion of the problems, the groups identified potential solutions. Suggested solutions from each group were shared with the other group to identify the solution that resolved the problem most effectively for both groups.

Results: Within one week of launching the customer satisfaction survey, the research team had in-depth information about the service problems, had generated multiple solutions and had vetted those solutions among both a random sample of customers and a sample of dissatisfied customers. Not only was this research methodology much more budget-friendly than the traditional solution, the speed of discovery kept a significant number of cardholders from discontinuing their card.

Social media campaign effectiveness. A global auto company planned a heavy social media campaign during a major sporting event. The company wanted real-time feedback on the social media messaging but was dissatisfied by panel options that were often long-after-the-fact retrospectives.

The company selected a quant/qual hybrid methodology to obtain the needed respondents with deeper insights into the message and reveal

how the company might improve its efforts for the next event.


Immediately after the event, the brand recruited respondents directly from the Facebook page created especially for the event. Respondents clicked into a short quantitative survey and were then given the opportunity to opt into a short bulletin board discussion about the event and the brand's participation in it.

Results: The entire research project was completed within three hours of the event's conclusion. The next morning, the marketing team reviewed results and integrated the findings into their next campaign. Because of the quant/qual integration, the cost was a very small piece of the overall campaign budget and yet the ROI was significant.

Continue to grow

So what makes a hybrid study special? Hybrid studies are generally thought to be faster and less expensive than traditional phased studies. Traditional methodology consists of separate phases with separate samples and a time period between the phases when analysis is performed that informs the next phase. This method has worked well for decades. However, it is too slow and expensive for many business applications. Hybrid methods eliminate key cost-drivers and time-eaters to deliver a mix of quantitative and qualitative information faster and less expensively than traditional methods. Because of their speed and cost advantages, we expect hybrid methods to continue to grow as a common methodology in the marketer's research toolbox.

Hybrid studies as we've outlined them in this article are simply intermediaries. As Blockbuster was the intermediary between VHS and Netflix, so hybrid is the intermediary between traditional, phased research and fully integrated research.

In the future, the terms qualitative and quantitative will very likely disappear from the research lexicon. Even the term hybrid quant/qual will disappear. Researchers of the future will look back in confusion that we considered the two as separate disciplines. With hybrid quant/qual integration and the text analysis techniques on the horizon, that future of truly integrated quant/qual is not so far away. 

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