



Hints and tips for setting up online groups and depth interviews

- *Groups and depths are more productive if you connect with the participants before and after.*
- *Decide if you are going to use general video conferencing software or an insight platform designed for research. Chat based interviews are an option when video might be difficult to organise.*
- *Check practical limitations: what devices respondents have, the quality of their internet connection, their degree of comfort with using software*
- *Brief clients on what to expect and how you will interact with them (or not!) during the research*

Connecting with participants before and after

Building rapport and trust – connection before content

There is a fast, almost nonconscious, judgment we make when first meeting someone we don't know. It goes back to the evolutionary pressures we faced in the past. [We evolved social cognition as a method of survival](#). We must decide the other person's apparent intent – are they friend or foe? Are they warm, friendly, trustworthy? And are they competent to do what they say they are going to do? Because some of the non-verbal and body language cues are missing in online interactions it takes longer to do this and build the trust that is required for effective qualitative research.

One of the conclusions of academic research in [using Skype as an interviewing tool](#) was that it was very helpful to have some email communication with participants prior to the interview. Any qualitative researcher who has done repeat groups with the same participants can testify what a joy it is to go into an interview knowing all the "getting to know you" part is over and being able to settle down to work quickly.

It is worth the extra effort to:

- Use email, chat, or a forum to get to know the people you are going to interview
- Give them a pre-task: telling you about themselves or related to the topic

Following up after the interview or group

Compared with face to face, there will be limitations on the type of projective techniques you can use and the degree of depth you can reach. It also may be harder to create and check interpretations as you go; there is less spontaneous interaction between participants and the moderator needs to spend more energy on overtly managing turn-taking in the group.

When setting up the research, ask if it will be OK to contact respondents for a few follow up questions

- This can be done asynchronously, email, chat, in a forum
- It will enable you to clarify any issues that emerge during analysis
- It will help check that recommendations are useful
- Many academic researchers do this as a matter of course to ensure their research is robust

Choice of Software

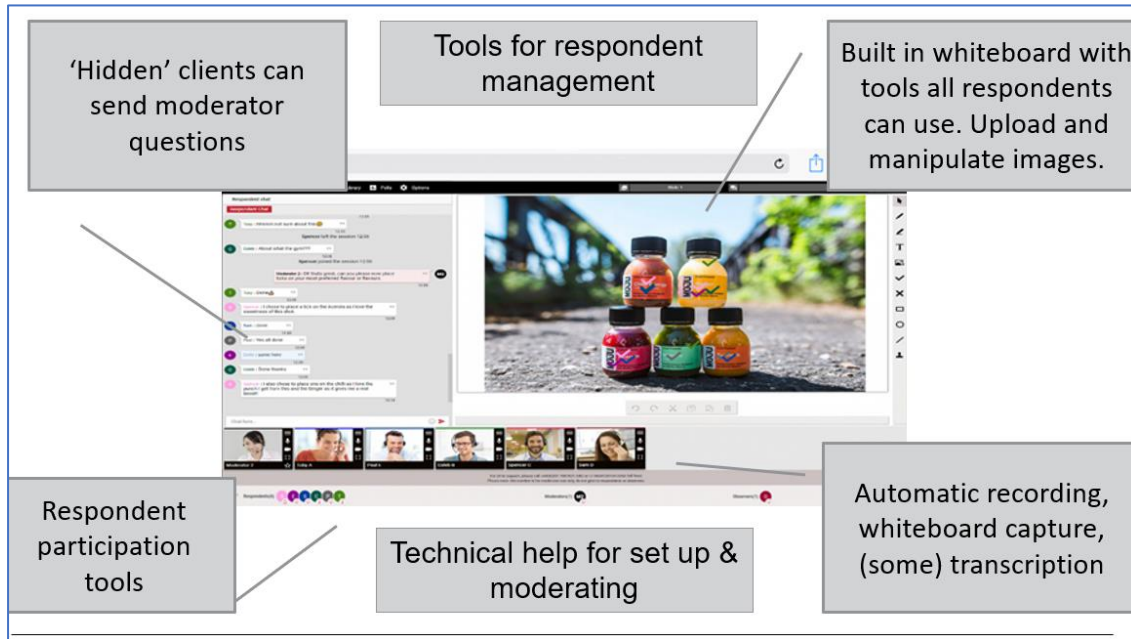
Online videoconferencing solutions such as Zoom, Teams or Skype are a good option if you don't have the need or money to use a research platform. Ideally

- You should be fully familiar with it
- Check out how to record and where the recording will be saved
- A whiteboard is a useful feature for using techniques
- It should be easy for participants to enter and use.

Insight platforms are apps, forums, forms of video conferencing and online tools designed specifically for market research. Advantages of using these are:

- Built in tools for handling participant data
- Technical help
- Fully functional whiteboards and tools for specific research functions, such as concept testing and product development
- Automatic recording including screenshots of visual exercises
- Some tools for analysis (they vary)
- Easy multi-method research e.g., start with an online diary, hold a video focus group or series of depths, follow up with an evaluation of concepts

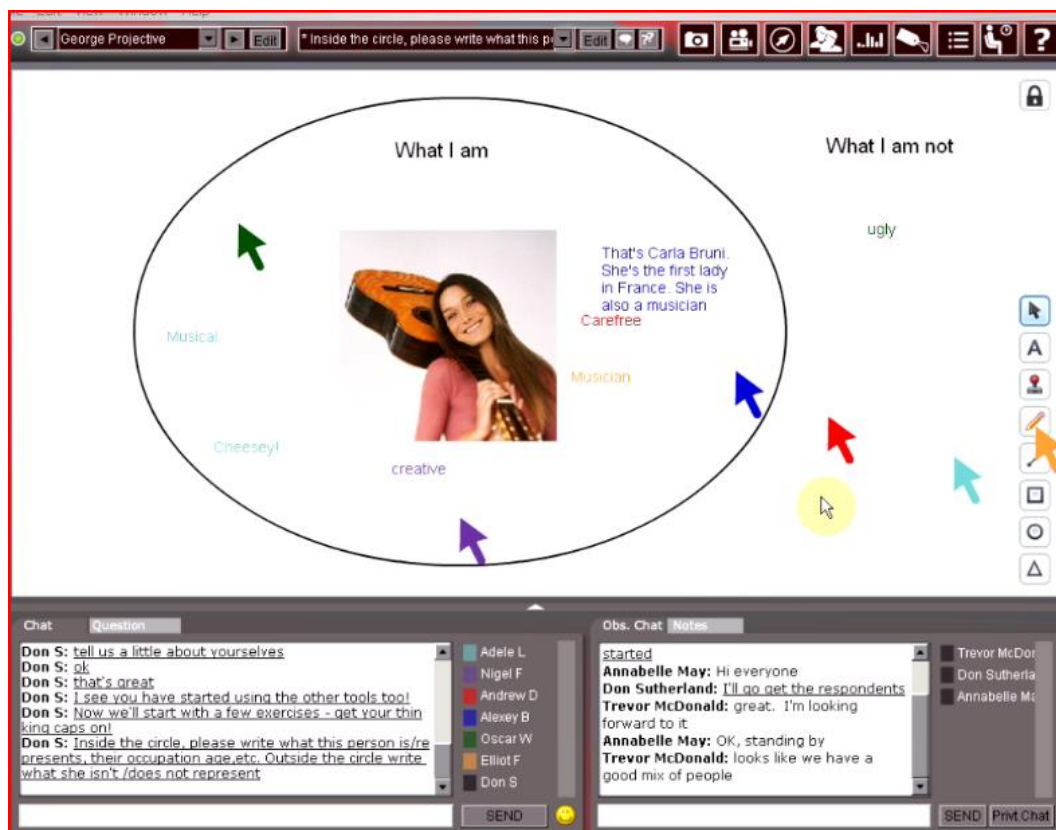
The disadvantages are a need to familiarise yourself with the platform - and there will be usage charges.



[Insightplatforms.com](https://insightplatforms.com) is an independent directory of platforms and apps specifically for researchers. Many platforms offer both synchronous and asynchronous tools in one package. Some combine qualitative and quantitative methods.

Chat based interviews on insight platforms

These are useful for participants who may have connectivity issues with video, or simply prefer the greater sense of anonymity. They require more preparation and a different style of moderation.



Synchronous Chat based interviews or groups

- Get to know the platform first, play with it, run a group or two on the subject with colleagues – most platforms should not charge you for familiarisation.
- See section on recruitment. Some insight platforms can do a connectivity check at recruitment and will offer tech support if you need it.
- Ask people to arrive 5-10 mins in the waiting room to sort out any technical issues and have a warm-up chat. You can use this time for some re-screening.
- You will have to type out a discussion guide IN FULL prior to the group and upload it. You can then send questions to the group quickly and easily. However, make your questions quite informal and don't make them sound like a questionnaire. Throw in the odd joke. Just because its written doesn't mean it has to be serious. You can edit and change the order of the questions although this will distract your attention for a bit. Make sure instructions for exercises are full and clear.
- Educate any clients in what to expect and how to behave. They will use any fallow periods while respondents are typing to send you notes or questions (more distraction) so it's best to ask just one client rep to communicate with the moderator and then not to expect an instant response.
- Consider a co-moderator to help with and client group management
- To avoid respondents getting bored or checking their Facebook, create visual exercises on the whiteboard. You will get more engagement overall (left brain and right brain working together). Allow a few minutes at the start to get respondents used to the tools they have for participating, so have some play exercises at the start.
- Tell people 'spillink mistiks dint mater' because you will still be able to understand. You don't want slow typing skills.
- Don't try to cover too much. Typing takes more time than talking so you may cover up to a third less, but you will have an immediate written and visual record.
- Check out at what points you may need individual responses (e.g., after looking at stimulus) and how to get them on the platform you are using. OR else agree that nobody starts typing their response to a stimulus until you give a signal.

- Decide how emotions are to be communicated (CAPS!! Emoticons / Drawings on the whiteboard) and make sure respondents know how to do these things from the start.

BE AWARE

- Answers to questions may come in out of sequence. Although you can encourage some discussion between respondents themselves the price you pay for that will be more comments out of sequence.
- In many platforms you can't see the whole sequence (sometimes you can switch to another view to do so). But if the answers you want to look at are two pages back it won't be easy. Like an in-person group, keep a note of anything you might want to come back to later.
- Moderating the group is as all-encompassing as a face-to-face group – you will be checking the topic guide for the next question, maybe re-ordering it, reading the dialogue stream, thinking of, and writing probes, keeping an eye on participation levels. So don't take on too much – it can be quite tiring.
- Respondents are going to be typing their responses to a question all at the same time, which does limit opportunities for them to influence each other and for dominant respondents. However some will edit their answer based on what they see appearing.
- Because they are so spontaneous, online groups are good at capturing immediate reactions but are less effective at reflective tasks, or more complex issues that may require more thinking time. (Bulletin boards/forums do this very well though).

Consider using a board or a form (asynchronous – where people answer questions and do tasks in their own time), either instead of, or combined with online interviews and groups.

All the admin is in one place

They make pre- and post-contact much easier

Respondents can upload images and videos

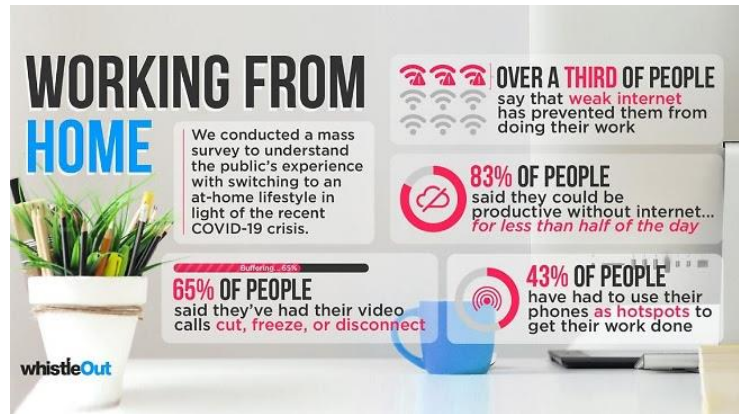
Respondents can undertake tasks and visits and report on them

You get more of a longitudinal view

Recruitment for online research

Ask the recruitment agency to additionally screen participants to discover:

- Their familiarity with an online environment and video conferencing tools
- What devices they can use to get online. Be clear it's a video interview and tablet or laptop are preferable to mobile phone. (Unless you want them to move the camera around.)
- Whether they have issues with broadband. These are more common than you might think.
- Keep an eye on recruitment quality – check participants are who they say they are.



Contact participants prior to the interview

- Avoid technical issues on the day; check microphones, headsets etc
 - Send hints and tips about logging on (if required)
 - Ask them to have pen and paper handy or anything else for exercises
 - A useful tip is to SMS participants shortly before the group or interview as a reminder. People can forget if they don't physically have to go anywhere.
- Pay attention to Data Protection. Depending upon where servers are based you may be deemed to be exporting personally identifiable information. Skype, Face Time, WhatsApp, and Google Hangouts have their own terms and conditions, which may include technically having access to call details or content. If unsure, The Market Research Society has extensive resources on Data Protection.

Manage Client Expectations

- Explain that you can still do effective depth interviews or groups online but there are adaptations. You may need to use different tools or exercises. You might have fewer respondents and shorter groups.
- If clients want to 'sit in', clear with respondents first, have client cameras off and agree at what points they may ask any questions.
- Avoid clients sending notes and questions through the chat function unless you have a closed channel for doing so.
- Consider having the clients take part in the group and ask their own questions after a certain point (and with some training on not being leading.)