

EBOOK

Accelerated change: **Online focus groups are now mainstream**



Overview

In a matter of weeks, the COVID-19 global pandemic changed the daily lives of billions of people around the world as cities, states, and countries, shut down normal operations and billions of people sheltered in place in their homes. Even as restrictions loosen, many offices and schools remain closed. This change, as we now know, is not a short-term blip whereby everything returns to 'normal' after a few months. Rather, the pandemic has set in motion a series of big and small shifts in the way we live our lives.

At this stage, the majority of the lasting changes are far from recognizable; they are seeds only beginning to germinate. However, there is an extremely visible one—the shift in video. There are many facets to this:

Shift in media video:

The rapid shutdown quickly impacted media video in terms of broadcast quality and production, think The Daily Show, Late Night with Jimmy Kimmel, and The Tonight Show all coming live from the presenter's home with varying degrees of quality and finesse. There is also a dramatic uptick in streaming services. Disney+, for example, nearly exceeded its five-year goal in just 5 months, obtaining 50 million subscribers by May 2020.

Shift in user-generated video:

In November 2019, The Verge reported a slowdown in growth for the young social media platform TikTok (at 1.5 billion downloads in under four years, perhaps this was inevitable). However, there are now reports that downloads of the app increased by 27% from February to March (and now stands at 2 billion) as everyone from Gen Z to Boomers tries their hand at one of the various trends circulating on the app, ranging from #BoredintheHouse to #HappyAtHome (of course recent US legislation may rapidly curtail activity.) This is but one platform, while user-generated video is far from new, the pace rapidly accelerated in 2020.



Shift in video communication:

The most notable shift, however, is in how people are now communicating with one another. In this sense, video is not just having its day; it has entered a whole new realm. Take Zoom for example. At the beginning of 2020, it was a reasonably sized player in the B2B world for webinars and video meetings. Even from the early days of the pandemic, it emerged as a leading connector of people for family bonding time, book clubs, and even memorial gatherings. According to reports, the platform's daily users has skyrocketed from 10 million to 200 million from December 2019 to March 2020. The surge in video calling isn't limited to Zoom. Within the workplace usage of Microsoft Teams and Google Meet has grown. In a bid to maintain connections with friends and family, people have also flocked to other video calling options, from WhatsApp and Skype to Houseparty and Marco Polo.

What is most striking about the shift in video is that it is not just the digital natives driving the trend, it is occurring across all the generations. People previously adverse to being in front of the camera are now welcoming it as a way to virtually embrace each other and connect in the most meaningful way available during this time of social distancing.

This is welcome news for research. With the initial global shelter in place orders and subsequent social distancing requirements, in-person research has all but ground to a halt. For some, at least initially, this meant that the research went on hold, while others, keen to understand the impact of COVID-19 on their customers and implications for their brands, went online.

Shift to online qualitative:

While online focus group and interviewing has been feasible for well over a decade, adoption has been slow. This is illustrated in the results of the annual Forsta "How Do You Research" study, where pre-2020 levels for online focus groups and interviews were 18% and 28% respectively. In 2020, these numbers leap to 48% and 47%. In the words of one participant, 'traditional research has gone online.'



In depth interviews

71% (2019)
73% (2020) ↑+2% YOY



Focus groups

63% (2019)
62% (2020) ↓-1% YOY



In depth interviews via webcam

28% (2019)
47% (2020) ↑+19% YOY



Focus groups via webcam

18% (2019)
48% (2020) ↑+30% YOY

For some the shift has been challenging, adapting changes in recruiting, technology, and how to run groups that work well in the online environment. Others have been quicker to embrace the shift and found that thinking creatively in dealing with the lack of in-person has led to positive results in the online environment.

We are doing focus mini groups, more than 4 participants plus moderator is impossible.

It has made us get more creative in how we interview consumers since we cannot travel, but I have been pleasantly surprised by how much can be done via [online] platforms.

We've gone more digital, which has both made personal connection with participants harder, BUT made research more nimble and we've had some great online groups.

We have moved all focus groups online rather than having them in person. This has required a new set of skills (online moderation, changes to the recruitment process, working with online group providers) which took time to get to grips with but now works pretty well, as far as technology/internet connections allow.

While in-person qualitative will inevitably return over time and will remain an important approach for collecting specific types of data (such as taste tests), online qualitative will not drop back to pre-2020 levels. The virtual floodgates are open. Once-a-upon-a time video calling was a futuristic, uncomfortable idea. Now it is the norm. This means research participants' are less daunted by the prospect of joining a virtual group while researchers, previously reticent to try online as in-person was a known entity in terms of delivering the rich insights sought, are diving in, exploring the possibilities and finding out their needs.

The most powerful element that can be used by any business leader is authentically understanding, engaging and connecting with their customer. Not just the voice of the customer through a set of data points, but their mind, their true perspective completely. Why they do what they do. How they think, feel, and act. Qualitative research helps us get even closer to people's lives, delivering much needed richness. In today's unexpected world, understanding people and uncovering their truths, has never been more central to business in meeting their customers' needs.





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