

Virtual vs. in-person research: In defence of a hybrid approach



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At the start of the COVID crisis, market researchers had to transition all research to virtual settings practically overnight: they responded by finding creative workarounds and experimenting with new tools, which allowed business to continue almost seamlessly. But with this success came a price. As in-person events resume and we start debating whether future meetings should take place in person, we take stock of this natural experiment to draw implications for the future.

Benefits of virtual research

Virtual qualitative research, of course, existed long before COVID turned our lives upside down. For years, researchers had relied on mobile diaries, virtual IDIs, and online communities to meet specific client objectives or circumvent geographical constraints. Then, suddenly, we had to turn to virtual research for everything. There is no question that we, as an industry, made it work, and even thrived. The virtual setting has several advantages: the pool of potential respondents is broader, costs are lower, and travel is not required, lessening the environmental impact. The virtual model is serviceable for most, if not all, research purposes, especially if we consider the range of tools available to users – although some flexibility is arguably lost when it comes to interactive and creative tasks.

From a fieldwork standpoint, virtual research is a seductive solution: the lack of geographical constraints is particularly appealing for small universes, where we might otherwise see the same respondents repeatedly in key cities. Overall, virtual fieldwork logistics are considerably simpler, technical challenges notwithstanding. As we move into the new normal, we may also find that respondents now require higher incentives or compensation for travel costs to take part in in-person research. Whether respondents are willing to go back to the facility at all, and if so when, is likely to vary by country. In many cases, these benefits will, with good reason, continue to tip the balance towards virtual research.

The added value of in-person research

And yet, in-person research has advantages that go far beyond getting a better read of the respondent's body language. Being in the same room allows for a wider range of creative tasks and projective techniques that can help overcome rationalisation. Stimulus materials can be used in a more flexible way. Having the option of moving around the room and engaging in dynamic work can also help with going beyond the obvious. While we can use virtual research to obtain the information we need on a basic level, meeting with people in person gives us a chance to build deeper rapport, to make a human connection that cannot exist in the same way using only virtual channels. This is especially true when it comes to focus groups: ensuring engagement from all participants is much more demanding online – a challenge that is likely to persist at least until high-quality virtual reality becomes widely available. In some instances, such as when testing large devices, a virtual approach might simply not be feasible; in other cases, for instance in patient research,

limiting the respondent pool to the digitally literate who can take part virtually would result in a biased perspective.

The impact of this decision is not limited to the research outputs. We have found it also affects project dynamics, including the degree to which both clients and researchers get to take time out from their day-to-day responsibilities to focus on the project without interruptions and fully engage with the research. Spending time with the client in person at an offsite location, researchers can collect high-quality feedback and comments that help them refine the materials and contextualise findings in a way that is difficult to replicate online. Important ideas often emerge from these informal discussions between interviews. These add significant value to the project and the analysis. Central locations days have long served as a team building exercise for both the client and the research team: for example, they often represent an opportunity for global clients to meet local affiliates and get their buy-in. In contrast, fully focusing on online discussions as a passive listener is challenging for most stakeholders, and the richness of informal exchanges cannot be replicated.

Capturing the best of both worlds

Fortunately, it does not need to be an “either / or” proposition. There are multiple hybrid options along the continuum from purely virtual to solely in-person that allow researchers to select the optimal combination of channels for each business issue, technique, and client. Research facilities nowadays are well prepared for hybrid approaches. At a high level, we recommend virtual-only research in small universes where geographic constraints need to be avoided, and to clients whose business we know well and who fully trust our decisions. To clients who want to be hands-on and engage with the project, new clients, and those testing large devices, we recommend an in-person component. A single, hybrid central location day featuring a combination of in-person and remote interviews, with the rest of the interviews conducted online, can already provide many of the benefits of offsite, in-person research, while avoiding most of the drawbacks. If even that is too challenging, there are still significant benefits to taking the time to attend a virtual central location day away from the office, even if all the respondents are remote.

Custom combinations of virtual and in-person engagements that make the most of each approach to meet client and project needs while addressing practical constraints will become a marker of successful research in the new era. Close collaboration with clients and fieldwork colleagues will be key to achieving this.