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# VIEWS

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## The Qual Business Future Ain't What It Used to Be

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Chameleon Branding

Marrying Qualitative and Quantitative  
Techniques in a New Media World



# Marrying *Qualitative* and *Quantitative* Techniques in a New Media World

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To address concerns about conducting research among “early adopters,” one solution is to not attempt to *find* people that own the gadget, but to *create* them by recruiting “average” consumers who do not have the gadget and then placing the technology in their home or in their hands.

**C**onsumers today have more choice and control than ever before when it comes to the kind of media and content they consume, when, where and how. New devices and services — such as DVRs (digital video recorders), portable devices with video capabilities (like video iPods, cell phones, Blackberry-type PDAs and Portable Play Stations onto which you can download television shows, movies and other content), Slingboxes (that allow you to direct content from one device, like your laptop or iPod, to another, like your TV), Apple TV (that allows you to play content from your iTunes program onto your TV), and the proliferation of more, better content on the internet (from traditional programmers like TV networks, as well as user-generated content like YouTube) — are changing



the business of television, media and advertising in unprecedented ways. In this rapidly evolving media and technology environment, understanding *how* consumers adopt and use these kinds of new gadgets — and the *implications* of that adoption for media companies, television networks and their advertisers — becomes an important and challenging research endeavor.

Among many others, some of the most pressing issues at hand for clients are:

- In general, when people can control their TV-viewing using a DVR, portable devices, a Slingbox, an Apple TV device or the internet, how does that deviate from “network scheduled” viewing? Do they still watch shows close to their scheduled time or on some completely different schedule? Do any viewing patterns emerge?
- What are the practical and the underlying motivations for manipulating, or not manipulating, the TV-viewing experience? How do consumers’ attitudes towards TV in general, and specific media brands in particular, change as their options for accessing the brands’ content changes?
- What can we learn about the power of the “shared viewing experience,” such as when millions of people gather in front of TV sets to watch the Super Bowl or the season finale of *American Idol*? Does the power of the shared viewing experience also extend to daily or weekly shows? Why or why not?
- Are certain types of television content more prone to be watched in “real time,” rather than recorded on a DVR and watched at a different time? If so, what content, and what makes it more prone to real time? Who watches this kind of content?
- Are certain types of television content more likely to be watched on the internet or on portable devices than others? How does the *ability* to access a show online or on a portable device impact the viewing of that show on an actual television set? For example, do *Grey’s Anatomy* fans watch it online instead of on TV just because they can, or do they prefer to watch it on TV anyway? What kind of screen do consumers use and where — a computer screen at the office, a laptop screen while sitting on a plane, an itty-bitty iPod or cell-phone screen while commuting, a 52" HDTV set in the living rooms? Do they have a preference for any of those screens over others? Are some shows better suited for some screens and not others? Does anyone actually prefer to watch all their shows on a non-TV screen? If so, why?

- When people can, do they fast-forward over commercials? Do they do so all the time, some of the time or not really that much? Does this behavior change, depending on the commercial? Which kinds of commercials get skipped, and which don’t? Is there a relationship between the kind of show someone is watching and whether he or she skips the commercial? Is there a relationship between the placement of the commercial in a string of commercials and whether it gets watched or not? Does this behavior change over time? And, in reality, how much more or less are people actually paying attention to commercials?
- Are certain types of consumers more prone to using new devices and technologies than others? Are there any surprises here in terms of who is actually using these devices and services, and why they are using them? Among some consumers, does consuming content in non-traditional ways translate to social capital? If so, among whom, and why? What does this say for the future of traditional media and for the traditional advertising model?

The biggest challenges of this research are two-fold. First, there is the challenge of deciding what methodology would be best suited for this endeavor, with two distinct, specific goals: one, entirely subjective (the personal, one-on-one experience of a consumer with a new gadget and his or her preferred entertainment content), and the second, entirely objective (what this might mean for the business of media, television and advertising).

Until this study, little was really known, but much was assumed, about DVRs’ potential impact once the technology reached critical mass. The fear, of course, was that once DVRs entered homes, no consumers would watch commercials, network loyalty would disappear and the advertising business model would be a thing of the past.

The second challenge lies in strategizing how to find consumers to study. Despite the “hype,” actual penetration of many of these new technologies is still quite low. Finding consumers who own these devices is much like searching for needles in a haystack, and once those consumers are identified, it is likely that they fall in the “early adopter” category. While research among this population of consumers could be eye-opening, it can also be misleading. Early adopters tend to be much more “hard core” and intense about using their new toys than average consumers might be when the technology reaches critical mass. Thus, research among early adopters must be viewed as *just that*, not as any kind of indication of what might really happen on a greater scale.


### Combining Research Methodologies

One solution to the first challenge is to design a research initiative that combines qualitative (ethnographic) research with quantitative (survey) research. In the ethnographic phase, researchers develop an in-depth understanding of consumers’ relationships to their devices, an

understanding developed through observation and intimate dialogue between researcher and subject. In the quantitative phase, the learnings from the ethnographic research are applied to the design and implementation of a survey that will measure and predict the impact of large-scale distribution of the device in question.

Ethnography is particularly well suited for research work on consumers and their media tools. It can:

- Provide an understanding of how consumers actually interact with their media tools and media brands, and how these impact everyday activities, opinions and behaviors (not just what consumers say about them)
- Provide the contextual information about family dynamics, household organization and socio-cultural realities that influence how media-related decisions are made and why
- Enable research on a technology by actually placing it in a subject’s home or context
- Study hard-to-quantify or yet-to-be-mainstream audiences
- Uncover counterintuitive findings, and identify burgeoning trends



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- Debunk myths and assumptions that stem from misinterpreted survey findings

To address the concerns about conducting research among early adopters, one solution is to not attempt to *find* people that own the gadget, but to *create* them, for the qualitative phase. Recruiting “average” consumers who do not have the gadgets and placing the technology in their home or in their hands over the course of the study provides two advantages. One, because these subjects are not early adopters, their usage and attitudes would be much more in line with what we would expect from the average consumer once the gadget reaches critical mass. Two, by placing the technology with the consumers at the onset of the study and observing the relationship evolve over time, we gain important information and insight about what happens during the “honeymoon” period and then beyond, as consumers get used to having the gadget at their disposal.

Ethnography reveals not only what consumers do, but when, how and why they do it. Over time, the ethnographers can document changes in behaviors — changes that evolve naturally as the novelty of the technology wears off, as the circumstances

for using the technology change, as the subjects become involved in other activities (work, school, social events, sports, holidays, vacations, etc.) and as the television season shifts. This ethnographic phase provides clients with invaluable insights and a depth of understanding that simply cannot be obtained by any other research technique.

Like any other research methodology, successful ethnographic research requires that attention be paid to certain core research concepts and practices, including: a sound research hypothesis and design; a defined research population; an understanding of how the parameters established for the research population may impact the findings; and a robust-enough sample size to be able to conduct a comparative analysis.

Successful ethnographic research also requires an investment in time and resources, including:

- Trained ethnographers who are skilled in the practice of participant-observation, not just in-home interviewers
- Consistent research over time to allow participants to get comfortable, and thus more genuine, with the ethnographers (not just one or two visits)

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With multiple ethnographers assigned to a rather extensive pool of about 100 households, we find commonalities, themes and patterns related to technology behaviors and attitudes that surface in the field notes. These patterns play a valuable role in the next — quantitative — phase of the project by providing the frame of reference around which a survey questionnaire will be developed.

### **A Case Study**

For example, for one study in 2003 for a major television network on the adoption and impact of DVRs, 100 households were recruited to participate in a six-month study, and new DVRs were placed in each home. Prior to participating in the study, these households did not own DVRs.

In 2003, DVR penetration was very low, but already the media and advertising world were extremely concerned about how the device would forever change their businesses. Until this study was conducted, little was really known, but much was assumed, about the potential impact of DVRs once the technology reached critical mass in American homes. The fear, of course, was that once DVRs entered homes, no consumers would watch commercials, network loyalty would disappear and the advertising business model would be a thing of the past. Observational research would provide the insights needed to be able to shape the language for discussion and future research on DVRs, including influencing the framework for a major tracking-survey program on DVR usage that we later implemented for the same client.

A team of eight experienced ethnographers conducted the fieldwork in a series of four to five household visits over the course of the six-month project. Each was assigned to between 10 and 14 homes. The households were also encouraged to keep viewing diaries to track their usage of linear (real-time) TV, compared to usage of the DVR.

The ethnography revealed some counter-intuitive findings about how household dynamics influenced DVR usage; how DVRs influenced household dynamics (particularly as it aided in conflict resolution); how the DVR influenced TV-related behaviors (i.e., not having to rush home to watch TV, participating in other activities

and channel surfing); who uses, and who does not use, the DVR the most in each home; and the fact that DVRs are not for everyone. We also learned that the impact on commercial viewing was not as substantial as originally thought. Importantly, while commercial skipping was certainly perceived as a side benefit to having a DVR, it was not the main, motivating factor for using it.

Although the ethnographers worked independently of each other, when the field notes were coded and analyzed, similarities in attitudes and usage towards the DVR were found that translated into six distinct segments or “user categories.” These user categories were then carried through in the quantitative phase. Consumers in 1,000 DVR households were interviewed and segmented into these categories based on their reported attitudes and usage, allowing the client to fully understand not only the “how” and “why” of people’s behaviors, but also to be able to statistically quantify how many consumers actually behave in similar ways.

Revisiting the ethnographic phase of the research endeavor over time is vital. Technologies proliferate, devices improve and services change on a rapid continuum. Similarly, consumers’ relationships to their gadgets and the content they offer are in constant flux.

### **Additional Considerations**

The quantitative phase of this kind of research program is important because it provides strategically valuable information that helps a company anticipate and make changes to its business model once usage of the gadgets becomes widespread. Yet, the low incidence of ownership of many of these new devices creates challenges when also attempting to conduct quantitative research, which can prove costly in most cases and virtually impossible in others.

Sometimes, a little creativity is in order. In the case of the aforementioned DVR study, a

pre-existing sample frame was in place that included 100 cable systems across the United States. From prior research using this sample frame, there was a prediction of incidence of DVR households in this sample, which allowed for the successful identification of 1,000 DVR households to complete the survey (this included homes with DVRs from their cable company, homes with DVRs from satellite companies and homes with DVRs bought at retail, like a TiVo, for example). As penetration of this technology has grown over time, it has gotten progressively easier to find consumers for subsequent waves of the survey.


If finding a large population of consumers who have and use the device in question is simply not possible, it is important to remember that *penetration* and *market potential* for the device are important aspects of anticipating its future impact. A survey of consumers overall, not just those with the gadget, may work in this case. What do consumers know about this device? Have they previously ever heard of it? What do consumers think of the idea of having this device? Are they planning on purchasing it? Why or why not?

This initial quantitative survey may yield a small proportion of consumers who already have the device (which may include early adopters), among whom the behaviors identified in the ethnographic phase could be measured across a larger population. The larger proportion of consumers would not have the device, but the survey would assess their current proclivity for such a device and how close they might be to actually purchasing it.

Ideally, the initial quantitative phase would evolve into a quantitative tracking program, like the DVR research did, to measure the growth in the device's penetration over time and to yield new insights about consumer usage and adoption as the device gains popularity and loses its "caché."

Revisiting the ethnographic phase of the research endeavor over time is equally important. Technologies proliferate, devices improve and services change on

a rapid continuum. Similarly, consumers' relationships to their gadgets and the content they offer are in constant flux. For media companies, television networks and other content creators — and the advertisers that rely on them to reach consumers — an investment in continued, in-depth research is essential to truly understand how these profound changes impact their bottom line.

Qualitative research provides context for the quantitative research, filling in the story, revealing the nuances beyond the black and white and illustrating the faces behind the numbers. Quantitative research supports and supplements qualitative findings, providing those important numbers that make the business case many clients require to be able to justify major, strategic business decisions. Especially in today's complicated and quickly evolving media and technology environment, these two techniques together can offer researchers and their clients the tools they need to address even the most complex research challenges. 

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