



SURVEY REPORT

The 2020 State of Qualitative Market Research

Introduction

Almost every research team fields qualitative studies.

More than **90%** of market researchers use qualitative data for tasks like new product concept analysis, attitudes and usage studies, and competitive analysis. But researchers — ever resistant to change — still prefer offline qualitative studies to digital ones. So it's little surprise researchers' favorite qualitative methodologies are traditional options like in-person focus groups and in-person interviews.

But most market researchers turn to quantitative data first.

Though it's hard to call qualitative methodologies underutilized, researchers still favor quantitative studies. They prefer quantitative data over qualitative for every market research task, and twice as many say quantitative data plays a key role in their businesses' decision making. That's why more than half of market researchers run quantitative research at least monthly, compared to just one-third who run qualitative studies monthly.

Digital tools are increasing the use of qualitative research.

Market researchers are slow to adopt new technologies — but they like that digital qualitative studies save both time and money while delivering robust samples. The result: Almost half say they're using more digital qualitative than last year, and most plan to further increase their usage. And next-generation researchers, who've used digital tools from the start, have turned into qualitative's biggest fans.

More than **90%** of market researchers use qualitative data

1/3 of market researchers run qualitative studies monthly

50% of market researchers are using more digital qualitative than last year



Nearly Every Market Researcher Collects Qualitative Data

In January 2020 we surveyed 195 market researchers to find out how they field qualitative studies and what they think of qualitative data. We found the average market researcher uses several different qualitative methodologies to support a variety of business use cases.

RESEARCHERS USE
QUALITATIVE DATA TO
SUPPORT A RANGE OF
BUSINESS GOALS

ALMOST ALL MARKET
RESEARCHERS FIELD
QUALITATIVE RESEARCH
STUDIES

RESEARCHERS STILL
FAVOR OFFLINE QUAL
STUDIES OVER DIGITAL
QUAL STUDIES

Almost all market researchers field qualitative studies.

It's tempting to think of qualitative research as underutilized — but **93%** of market researchers say they collect qualitative data. In fact, most ran at least seven qualitative studies last year. Researchers' favorite qualitative methodologies are in-person focus groups and in-person individual interviews, but plenty say they also run online discussion boards, online video interviews, and offline lifestyle immersion studies.

81%

In-person focus groups

71%

In-person individual interviews

60%

Online discussion boards

47%

Online video interviews

41%

Offline lifestyle immersion

Researchers use qualitative data to support a range of business goals.

Almost half the market researchers we surveyed turn to qualitative studies for new product concept analysis, making this their favorite qualitative use case. Other business needs commonly supported by qualitative data: attitude and usage studies, positioning and competitive analysis, product satisfaction research, and advertising effectiveness.

NEW PRODUCT CONCEPT ANALYSIS **44%**

ATTITUDES AND USAGE **42%**

POSITIONING & COMPETITIVE ANALYSIS **40%**

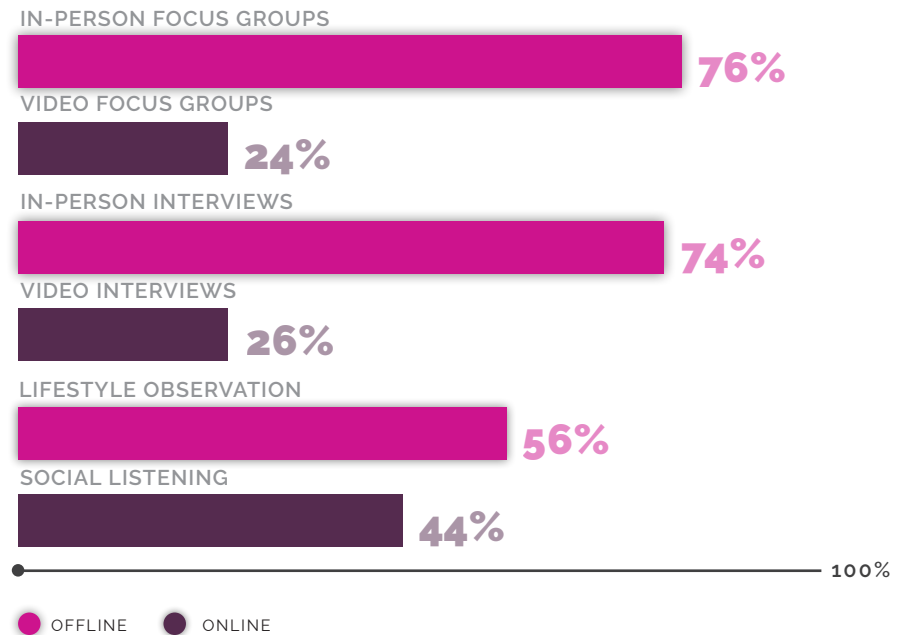
PRODUCT SATISFACTION **38%**

AD EFFECTIVENESS **37%**

Researchers still favor offline qualitative studies over digital qualitative studies.

While more than **70%** of market researchers run in-person focus groups and interviews, no digital qualitative methodology exceeds **60%** adoption. And when we put online and offline qualitative methods side-by-side the offline option wins every time. Why? Nearly half of our respondents say they fear losing face-to-face benefits like reading body language and pushing participants for deeper responses. And our previous surveys show market researchers often resist new technology; many likely just don't trust digital qualitative studies yet.

OFFLINE VS. ONLINE PREFERENCE



BARRIERS TO DIGITAL QUAL





But Market Researchers Still Prefer Quantitative Studies To Qualitative

It's true that nearly every marketer researcher uses qualitative research. But most still turn to quantitative data first and trust it more.

RESEARCHERS TRUST
QUANTITATIVE DATA MUCH
MORE THAN QUALITATIVE
DATA

RESEARCHERS TURN TO
QUANTITATIVE STUDIES
FIRST WHENEVER
THEY CAN

RESEARCHERS USE A LOT
MORE QUANTITATIVE
STUDIES THAN
QUALITATIVE

Researchers trust quantitative data much more than qualitative data.

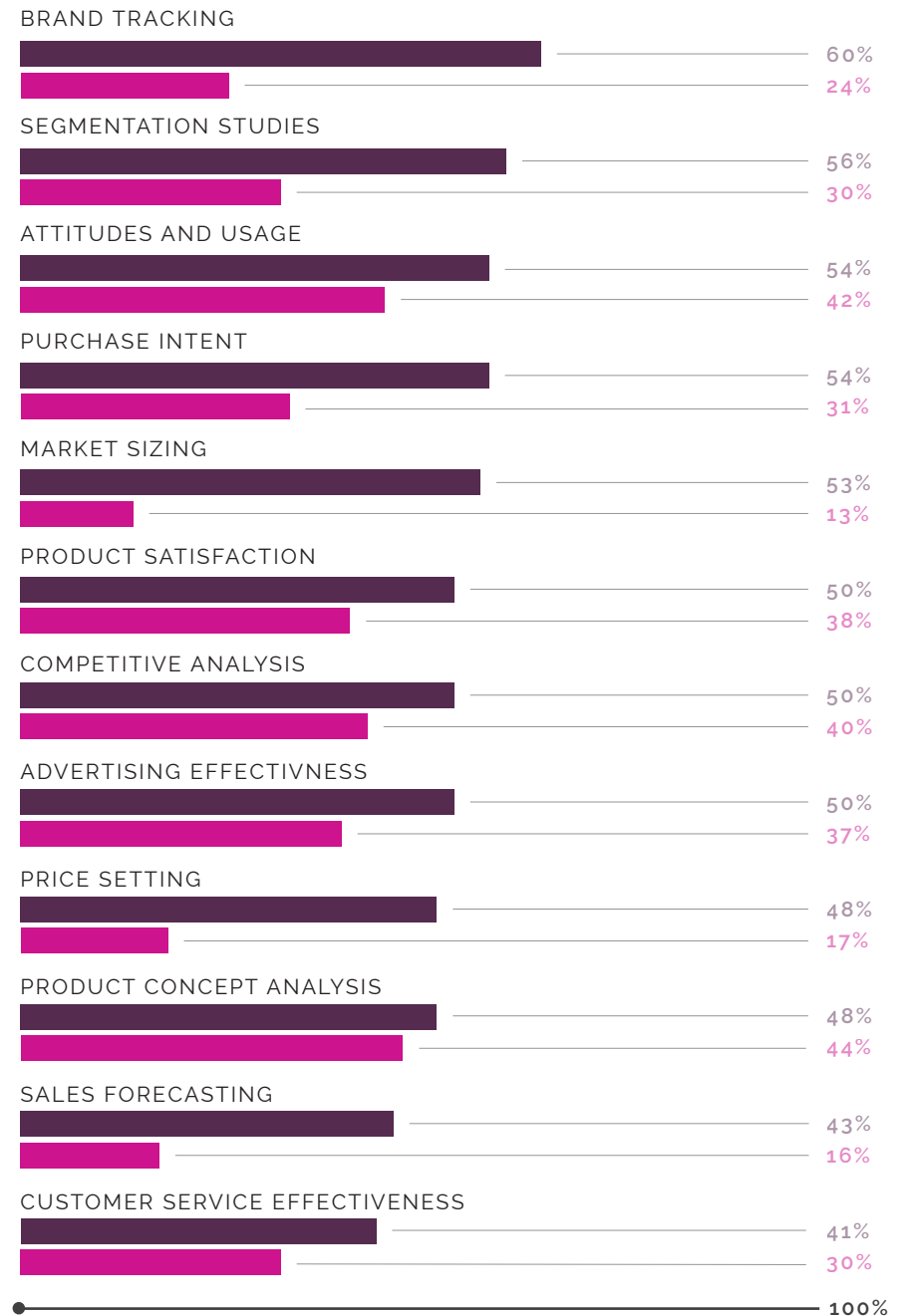
Most companies highly value quantitative research, but the same isn't true of qualitative studies. More than half of the researchers we surveyed say their companies use quantitative data to influence most of their business decisions, but only one-quarter say the same about qualitative data.

53% say quantitative research results are "highly valued - most business decisions are influenced by this"

27% said the same of qualitative research results

Researchers turn to quantitative studies first whenever they can.

Most market researchers think quantitative research can handle almost any use case but see clear limitations to qualitative research. At least **41%** of the researchers we surveyed use quantitative data for every use case we asked about; no more than **44%** of them use qualitative data for any use case. In fact, researchers prefer to use quantitative studies rather than qualitative studies for every possible market research task. And fewer than **20%** turn to qualitative data for use cases like market sizing and price setting.



● QUANTITATIVE ● QUALITATIVE

The result: Researchers use a lot more quantitative studies than qualitative.

Greater trust and greater mindshare leads to greater usage. More than half the researchers we surveyed say they run quantitative studies at least once each month. By comparison, only one-third field qualitative research at least monthly.



51% run **12+**
quant studies
per year



33% run **12+**
qual studies
per year



Market Researchers Are Warming To The Advantages of Digital Qualitative Studies

In an industry with long tenures — and where practitioners are saddled with mundane tasks — it's no surprise that practitioners take time to accept new technologies and methodologies. But digital qualitative research is starting to break through this resistance.

RESEARCHERS SEE THE POTENTIAL OF
DIGITAL QUALITATIVE METHODOLOGIES

MARKET RESEARCHERS ARE STARTING TO
USE MORE DIGITAL QUALITATIVE STUDIES

Researchers see the potential of digital qualitative methodologies.

While some market researchers still don't field digital qualitative studies, most understand the value they provide. More than half of the researchers we surveyed say digital qualitative studies deliver advantages in speed and timeliness. Many also see benefits in cost and efficiency, as well as in recruiting a large and high-quality sample.

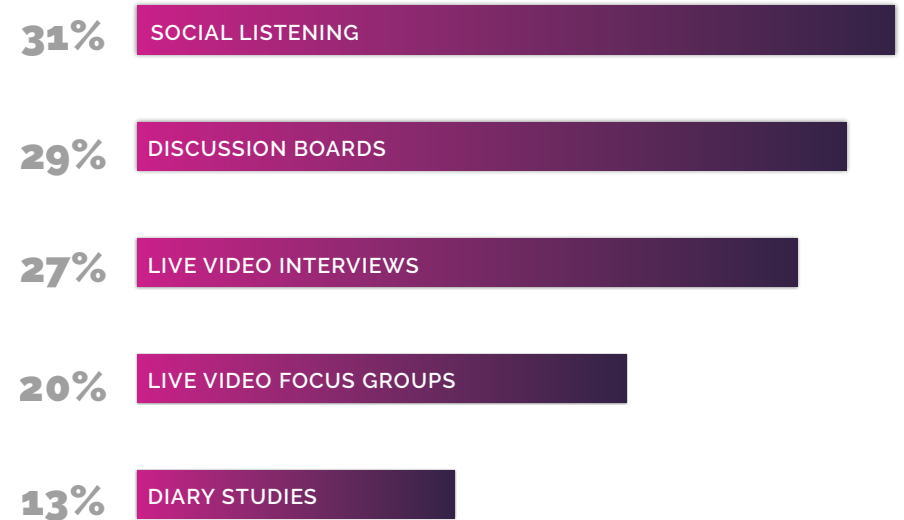
BENEFITS



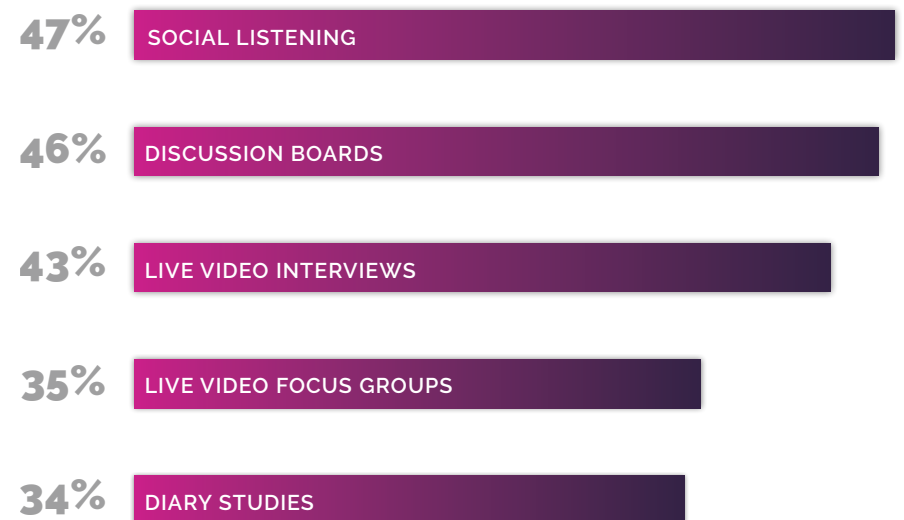
Market researchers are starting to use more digital qualitative studies.

Almost half of researchers say they're running more digital qualitative now than last year. Net usage of almost every digital qualitative methodology is up, especially social listening and live online video interviews. And the majority of researchers plan to further increase their use of digital qualitative research. The types of studies they're most interested in for the future: Social listening and discussion boards.

INCREASED USE OF DIGITAL QUALITATIVE LAST YEAR



PLAN TO INCREASE USE OF DIGITAL QUAL THIS YEAR



CONCLUSION

Digital Benefits Will Drive Greater Adoption of Qualitative Research Overall

The advantages of digital aren't just generating higher use of digital qualitative studies; they're improving perceptions and use of qualitative research as a whole.

NEXT-GENERATION
RESEARCHERS TRUST AND
USE QUALITATIVE METHODS
MORE

DIGITAL IS CHANGING HOW
MARKET RESEARCHERS
THINK OF QUALITATIVE
DATA

FUEL CYCLE DRIVE THE
ADOPTION OF DIGITAL
QUALITATIVE

Next-generation researchers trust and use qualitative methods more.

Market researchers with five or fewer years of experience are about **40%** more likely than average to use qualitative studies for key business needs like new product concept analysis, attitudes and usage research, and product satisfaction studies. Overall, **42%** of less-tenured researchers run qualitative studies at least monthly compared to just **33%** of veteran researchers.

Digital is changing how market researchers think of qualitative data.

Veteran researchers still prefer offline qualitative studies, trusting their own intuition and ability to read faces and body language. But less-tenured researchers who've used digital tools from the start don't carry this bias. Those with five or fewer years experience see qualitative data as easier and cheaper to collect than more-tenured researchers accustomed to in-person methodologies — and value the extra time they have to work on more meaningful tasks like storytelling and recommendations.

58%

use qualitative research for attitudes and usage vs. **42%** overall

64%

of those with 5 or fewer years tenure use qualitative research for new product concept vs. **44%** overall

53%

use qualitative for product stat studies vs. **38%** overall



Fuel Cycle Drives the Adoption of Digital Qualitative Research

Solutions like the ones offered by Fuel Cycle and its partners play a lead role in driving the adoption of digital qualitative research among the new wave of professionals in the industry. FC Live, our proprietary digital interview and focus group software was designed in collaboration with expert researchers to ensure that data quality was not compromised by the increased convenience integral to the tool. Researchers are running out of excuses not to try implementing this kind of technology.

Researchers looking to provide greater value by introducing new and improved methods into their organizations rely on Fuel Cycle to meet their goals every day. Learn how Fuel Cycle's digital qualitative research solutions can boost your team's business value and impact potential.

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