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# BIG QUALI

SCALING QUALITATIVE RESEARCH

 **QUALIQUANTI**  
CREATIVE INTELLIGENCE

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## Introduction: From Qual to Big Qual

If data is the new oil for businesses, where does qualitative data fit in? How can it be produced, harvested, exploited, and refined into the fuel needed to meet the challenges of the 21<sup>st</sup> century? In a world ruled by data, by the magic of numbers, what is the place of qualitative research and human intelligence? Alongside algorithms and Artificial Intelligence, what is the place of a qualitative, creative, cultural, and empathetic approach to enlightening decision-makers?

**NB:** The commonly accepted definition “Big Qual” focuses on reaching a critical mass of respondents and exploiting verbatims. In this book, the term encompasses a larger dimension including the semiological study of words, images, and texts at scale. Documentary monitoring and literature reviews are coupled to data observation and analysis for an in-depth study and the production of comprehensive qualitative results.

### Qual to understand and inspire, quant to measure

Qualitative research involves questioning and observation methods. They are traditionally based on individual interviews and group meetings (focus groups of around ten people) with limited samples, ranging from a few to a few dozen people. They include observation in situ and documentary collection. They aim to understand a market and decipher a material, social and symbolic reality. They draw on the human sciences (ethnology, psychology, sociology, philosophy, etc.) as well as the language sciences (communication, semiology, linguistics) and general culture (history, politics, economics, art history, etc.) to give meaning and to understand the underlying motivations of consumers.

Qualitative research is often opposed to quantitative research, which is associated with the idea of measurement and correlation. These methods involve panels, barometers and surveys involving samples of several hundreds or even thousands of individuals. Their function is to generalize the results to many people, giving priority to representativeness of the population under investigation.

Quant has always been taken more seriously than qual. Marketing is synonymous with effectiveness, measurement, and quantification. Quantitative research benefits from the legitimacy of behavioral measurement studies and polls. Qualitative studies are considered interesting and intellectually enriching, but the synthetical power of a figure remains supreme.

## Qual control turned upside down by digital

With the development of IT and digital technology, qualitative research has made productivity gains at every stage. There are more and more methods of questioning, with increasing sample sizes. A qualitative study can survey communities of several dozen or even hundreds of individuals. Qualitative data is increasingly abundant, with considerable processing capacity.

**Table 1 - Qual: Three areas of digital transformation**

1/ Digitalized questioning and multiple methods	2/ Sample sizes and data collected	3/ Software-enhanced processing and analysis
<p>Synchronous and asynchronous remote and long-term interrogation tools</p> <p>New modes of interrogation (forums, chats, <i>online</i> focus groups, communities, blogs, <i>crowdsourcing</i>, mass observation)</p> <p>New ways of participating (audio, photos, drawings, self-videos, auto-ethnology, co-creation)</p>	<p>Increase in sample size (communities, forums) facilitated by proprietary panel and <i>online</i> recruitment</p> <p>New collection technologies (photos, videos, captures)</p> <p>Access to qualitative megadata (on Instagram, Pinterest, YouTube, TripAdvisor, Amazon, communities and websites)</p>	<p>Processing by software or social listening, artificial intelligence to avoid being drowned out</p> <p>Creating qualitative databases with YouTube or WordPress</p> <p>Network organization for data classification and collaborative approach to analysis</p>

This digital tsunami affects every stage, from the co-design of research (interaction with the customer via collaborative tools) to the communication of results, with video extracts overlaid.

With the ability to process large-scale data, the quality/quantity dichotomy is shrinking. The explosion of digital data is leading to new ways of seeing and analyzing the world. A new complementarity is emerging between structured data (Big Data) and unstructured data (Big Qual).

## Structured and unstructured data

Big Data deals with structured data: computer megadata that has been tagged and coded so that engines can process it.

**Table 2 - Big Data / Big Qual: two types of data**

	Structured: Big Data	Unstructured: Big Qual
Nature	Words, signs, numbers, codes, amount, date, etc.	Photos, videos, sound, text, testimonials, etc.
Treatment	Designed for machines: search engine robots	Designed for humans helped by software
Limits and strengths	No risk of interpretation But a volume of data that's hard to sort through	Includes irregularities and ambiguities But with nuance and meaning

Faced with unstructured data, Big Data will seek to structure it to exploit it. This is *data crunching*.

The challenge with unstructured data is that it is everywhere, created by everyone, escaping the logic of the tools, like a liquid that spreads. If Big Data were an iceberg, unstructured data, sometimes referred to as dark data, would be the tip of the iceberg. Unstructured data refers to any data outside any type of structure.

Big Qual is the expression we use to describe the collection and analysis of unstructured data, and to emphasize the complementary nature of Big Data. Big Qual is used<sup>1</sup> to evoke the idea of a "*large qualitative data set*" or "*big qualitative data*", qualitative samples of over 100 people, *computer-assisted qualitative data analysis software* (CAQDAS), *large-scale mixed methods*, longitudinal and iterative approaches.

Big Qual is based on a cultural, creative, and emotional vision of research, whereas Big Data favors a positivist, rationalist and behaviorist vision. The power of qualitative research lies in its ability to shed light, provide an overview, identify *insights*, project into the future, encourage optimization and build theories.

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<sup>1</sup> <https://journals.sagepub.com/doi/full/10.1177/1609406919880692>



## Big Data and Big Qual

Big Qual works with smaller quantities of data than Big Data: from a few dozen to a few hundred (for photos and videos) to a few thousand or even more for texts. The challenge for Big Qual is to achieve a relevant critical mass. The ideal corpus is large enough to appreciate nuances without being drowned out.

**Table 3 - Big Data / Big Qual: what are the differences?**

	Big Data	Big Qual
Number of data	A few thousand or a few million	A few dozen to a few thousand
Nature	Structured data from transactions, sensors, machines, collection tools, etc.	Unstructured data and data created from reality and humans
Typical applications	Scientific, health, political, financial, economic, commercial, ecological, reputational, sociological	Sociological, marketing, creative, experience review, 360° studies, search for <i>insights</i> , asset evaluation, validation of concepts, etc.
Sources and methods	Social networks, media, Open Data, Web, private and public databases of a commercial or scientific nature, clicks, browsing data, etc.	<i>Offline</i> or <i>online</i> observation, document monitoring, archives, benchmarking, monitoring, social web, forums, communities, real-life recording, open questions, use tests, creative workshop, etc.
Criteria	Volume, velocity (real time), variety, veracity, value, visualization, metadata	Critical mass, originality, relevance, sensitivity, nugget, explicatory value
Analysis	Modelling, algorithms, semantic analysis, data intelligence, prediction, sentiment analysis, indexing	Cultural analysis, creative intelligence, trends, innovation

## An agile Qual

With digital technology, the research industry has the capacity to process a mass of qualitative data. The risk is setting up long, costly projects where clients expect quick, profitable results. This is particularly true for start-ups, which operate on a continuous learning curve and optimize their offering over time in a *lean management* culture. They are looking for rapid initial contact with consumers. It implies submitting a mock-up, a simulation of the offering, a sketch, examples of the competition or an MVP (*Minimum Viable Product*) as soon as possible.

Qual *Online* favors iterative processes with affordable budgets. A forum of a dozen people combined with a few videoconference meetings remains economical and easy to organize. Big Qual has variable geometry in terms of deadlines and budgets: it ranges from large-scale studies that give a complete picture of the puzzle to rapid studies with short loops. The alternative of traditional qualitative studies is still very relevant for rapid, one-off, focused studies. One solution is to combine traditional qualitative research with a Big Qual system.

**Table 4 - Classic Qual or Big Qual?**

	<b>Classic Qual</b>	<b>Big Qual</b>
Duration	Occasional	Over time, iterative
Objective	Focused	360°, holistic
Sample size	5 to 30 people	Greater impact on part of the system
Methodology	Simple	Hybrid, interdisciplinary
Amount of data	Limited	Important
Analysis	Manual or partially assisted	Assisted, technology integration
Calendar	2 weeks to 1 month	3 weeks to 6 months
Budget	Limited	Variable geometry

## Back cover

In the age of Big Data and new technologies, every company has access to a mass of qualitative data - photos, videos, testimonials, etc. - that can be used to improve the insights from qualitative studies.

What is the value and economic interest of this qualitative data?  
How can we produce and exploit this material without drowning?

Part of the answer lies in **a new dimension of qualitative research: Big Qual**. The goal is to scale qualitative data, both in terms of the quantity and quality of the findings. This approach goes beyond traditional qualitative research in several respects:

- **larger samples** - forums, communities, *social listening*;
- **longer interrogations** - up to several weeks.
- **automated interactions enhanced by technology** - software, sensors, smartphones, video, etc.
- **expanded documentary databases.**

### What are the keys to the success of Big Qual?

- **Produce quality data on a large scale, in cooperation with the public** - provided you know how to stimulate them.
- **Analyzing this data with a human and cultural approach** when artificial intelligence is limited to identifying and classifying data.
- **Promoting assimilation of the results through inspiring deliverables.**

Trough examples, this book aims to-illustrate the transformation of qualitative research *via* digital technology and to demonstrate its full potential. Shaking up traditional research approaches, Big Qual is an effective method, accessible to everyone - marketing professionals, managers and decision-makers thinking about the future of their company and their brands - and within a limited time and budget.

**Daniel Bô**, HEC and SciencesCom, CEO and founder of the QualiQuanti research institute, is a pioneer of *online* panels and qualitative and quantitative research.-Author of blogs and white papers on research, he has published articles on brand content and brand culture with Dunod. With Big Qual, he offers an illustrated overview of digital methodologies and reflects on how to scale qualitative research.

## Preamble: What makes a good study?

To fully understand the philosophy behind this book, we propose to begin by defining what a "good study" is and setting out our approach to this profession.

The institutes go through various phases (preparation, fieldwork, analysis with results, deliverables, and presentation).

**Table 5 - Criteria for a relevant quality study**

	<b>Quality criteria</b>
Definition of objectives	Detailed and prioritized objectives, valid short- and long-term results, ambitious and fruitful issues
Methodology	Transparent on the different phases of the analysis, intermediate working documents, agile, progressive, hybrid, possibility of monitoring
Preparatory research	Comprehensive benchmarking, identification of best practices, taking account of the context
Consumer land	Targeted recruitment, high quality and quantity of consumer contributions (opinions, photos, videos), faithful recordings and transcriptions
Viewpoint	360° approach, on different scales, covering the whole subject (holistic), interdisciplinarity
Analysis	Depth of analysis, expertise, cultural added value, search for meaning, evolutionary, concrete, creative, human, multidimensional
Results	<i>Insights</i> , cultural insights, broadening horizons, making complexity accessible, nuances, stimulating creativity, sustainable

To achieve this, here are a few guidelines.

Cultivate a high level of long-term ambition:

- Embracing complexity. The role of an institute is to take account of multi-dimensional issues and to help people see clearly, starting from chaos.
- Think of the research business in terms of expertise and R&D, with a gradual capitalization of knowledge on complementary subjects

Moving away from positivism and the cult of numbers:

- Study reports must incorporate the emotional, cultural, and sensory aspects of reality.
- Do not limit yourself to the number of interviewees and the quantity of testimonies. It's also about covering the whole spectrum of realities, until we reach a critical mass of cases with significant diversity.

Staying agile, on a human scale:

- Ensuring quality insurance is a fascinating profession. Creativity and emotion have a real place in it.
- Guaranteeing participants and customers a rich and stimulating experience with continuous learning.
- Proposing a highly visual deliverable that facilitates the appropriation and circulation of the material collected.
- Putting in place systems that mobilize stakeholders in a collaborative and iterative approach.

Throughout the book, we will provide links to publications, *slide casts* and videos to illustrate the concepts we cover.

## Chapter 1: Understanding the impact of technology on qualitative

Qualitative research is an encounter with the field. This encounter has been revolutionized by the power of technological tools for collecting or producing data, analyzing it, classifying it, structuring it and giving it meaning. Techniques for recording reality (photo, video, audio, sensors) enrich research. Qual *online* gives access to a new form of collective intelligence and encourages long-term research.

### The explosion of qualitative data

Originating in the 1960s, qualitative studies have historically been based on in-depth interviews and face-to-face round tables. They draw on methods from psychoanalysis, ethnology, psychology, semiology, and structuralism. The French tradition gave center stage to non-directive methods, to the exploration of motivations and attitudes with the ambition of probing the unconscious, and to observation.

Large-scale qualitative studies have been around for decades, with systems of 40 interviews or 10 groups. Manually processed, they can be long and tedious, resulting in waste. Technology makes it easier to collect and process massive amounts of data.

With the advent of digital technology, the web and the widespread use of PCs and smartphones, there is a proliferation of sources and collection methods, with greater flexibility in the use of the material collected.

Today's technology provides analysts with a single screen:

- Media archives from around the world: articles, reports, polls, opinion pieces, influencer content, experts, etc.;
- Data from manufacturers and distributors: product photos, description, videos, communication, content, shelf photos, product sheet, history, etc.;
- User reviews and testimonials: photos, videos, comments, forums;
- Data from social networks: publications, tweets, photos, and videos.

To see the wealth of data available:



For a long time, consumers were selected for qualitative research based on telephone records or recruitment at the point of sale. From the 2000s onwards, panels of volunteers were developed, making it possible to select targets from all over the world. Social networks make it easier to make contact based on criteria such as interests, location and consumption.

Technological advances have made it possible to transcribe interviews automatically. Speech-to-text software has made great strides and can now be used to transcribe an interview with a high level of quality.

Advances in smartphone technology are giving consumers professional-level tools. This democratization of technology facilitates the production of enriched qualitative data. Massive ethnographic systems based on self-videos can be launched.

Data collection methods have gone digital. *Online* tools make it possible to interview 10, 20 or 100 people remotely over a period of several days, weeks or even months. They generate hundreds of pages of verbatim data, as well as photos and videos. Messaging applications such as WhatsApp can be used to run high-quality *online* forums at little or no technical cost. The same goes for video-conferencing meetings on Zoom, Teams, Meet, Gotomeeting, tools that have spread with the Covid-19 pandemic.

We have entered an era of qualitative data overload. This data can be processed with software and organized using artificial intelligence. The aim of this book is to show how to make the most of this sea of data while preserving its richness. We will look at textual data as well as photographic, audio and video data.

### ***Online* and face-to-face**

The Internet has enabled the development of qualitative *online* questioning. To fully understand the changes, here are a few observations on the differences with face-to-face interviews:

**Table 6 - *Online* / face-to-face data collection: how do they complement each other?**

<b><i>Online</i></b>	<b>On-site</b>
Written, voice and video speeches	Verbal and non-verbal speech
Limited sensory and 3D perception	Promoting the sensory dimension

Complete anonymity in the forum and no pressure from the group on the individual: uniform speaking time	Phenomena of social representation and leadership that influence the group: heterogeneity of speaking time; creative regulation of group life by the facilitator
Variable duration	Limited questioning time
One or more moderators	The key role of the presenter
Opening the geographical criterion	Restrictive geographical criterion

With digital technology, customers and moderators do not need to travel, which simplifies logistics and saves time and money. In face-to-face interviews, the interview period is generally **limited**. It is very rare and very costly to interview the same group or the same households several times. On the Internet, re-interviewing over time is natural: respondents can be approached periodically.

### Recording reality

Photo, audio, and video recording represent a cultural revolution. According to semiologist Raphaël Lellouche, too much emphasis has been placed on words as the fundamental vectors of meaning. The discursive representation we have of culture is an atavism from the Gutenberg era. In the Gutenberg era, media were symbolic. Since the mid-19<sup>e</sup> century, technical progress has enabled us to move from the symbolic to the real. All contemporary culture is thus conditioned by technical media which record the real. Meaning no longer passes solely through the medium of speech or writing, but connects directly to our physiology, to our sensory organs. We need to capture these new manifestations of culture (through the body and through machines) at the various stages of a study.

### Proof through images

Video recording has a strong impact. Employees can no longer contradict the problems identified. The video gives a much stronger sense of the facts, a concrete visualization of the context and empathy with the user than a verbatim report.

Technology now makes it possible not only to film usage but also to ask consumers to film themselves using a product (ethnological self-video). The UserTesting platform<sup>2</sup> provides tools for filming oneself and producing accounts of customer experience. This makes it possible to gain an intuition of usage by seeing it done rather than by telling it, and to appreciate the difference between what the user says and what he does. This is a goldmine for Research & Development

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<sup>2</sup> <https://www.usertesting.com/>



departments who need to visualize usage. An international survey of current research tools shows that technologies are being used in a variety of ways: video diaries<sup>3</sup> over a five-week period to assess the use of a range of shampoos over time, a study for Carlsberg<sup>4</sup> with respondents tasked to record themselves at every moment of consumption, to photograph the pubs they visit, to take pictures of the menu and to film themselves to explain their choice in the bar. Some studies use GoPro cameras to show the user's point of view:

- patients<sup>5</sup> equipped to show nurses the point of view of those they care for
- students who choose their books in the library

Research clients are looking for real-life recordings (photos, videos, audios) with a compilation of reactions and highlights.

## Forms of collective intelligence

Collective intelligence refers to the form of intelligence that human communities or organizations (companies, teams, groups) are capable of when faced with the complexity of their environment. Digital technology fosters a new form of collective intelligence: network intelligence.

In 2004, in *Collective Intelligence, the invisible revolution*<sup>6</sup>, Jean-François Noubel identified three main forms of collective intelligence.

- 1) The original collective intelligence** is that of the small group, the tribe, team sport, the commando.

The preferred medium for this type of organization is the 5 senses, including sight, hearing, and touch, to sense our neighbors and adapt our behavior. *The qualitative group* and the individual interview correspond to the original collective intelligence.

There are two limitations to this form of organization:

**Numerical limit:** these communities can only function with a limited number of individuals, who establish interpersonal relationships.

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<sup>3</sup> <https://www.mustard-research.com/case-studies/mustard-helped-tangle-teezer-launch-new-products/#1491298731152-18e3c6da-2c2707e5-61e8eddf-af78>

<sup>4</sup> <https://www.mustard-research.com/case-studies/mustard-helped-carlsberg>

<sup>5</sup> <https://www.nursingsimulation.org/article/S1876-1399%2821%2900063-3/fulltext>

<sup>6</sup> [https://testconso.typepad.com/Intelligence\\_Collective\\_Revolution\\_Invisible\\_JFNoubel.pdf](https://testconso.typepad.com/Intelligence_Collective_Revolution_Invisible_JFNoubel.pdf)

**Spatial limits:** people need to be close together, so that they can see the whole picture (*holoptism*) and match their behavior to that of others.

**2) Pyramidal collective intelligence.** To overcome the two major limitations of the original collective intelligence, hierarchical organization of the pyramidal type has become the norm. When it comes to building, planning, cultivating, transporting, manufacturing, and coordinating many individuals and spatially dispersed activities, self-regulation is impossible. You need a leader who makes decisions and people who defer to him.

The preferred medium for this form of pyramidal collective intelligence is writing. This type of pyramidal collective intelligence is common and powerful: companies, administrations, governments, and armies all operate on this model. It requires:

- Division of labor, specialization of tasks
- Authority: by divine right, by descent, by merit, by expertise, by legality, by diplomas...
- Norms and standards: they ensure the objectification, circulation, and interoperability of knowledge within the group.

**Quantitative face-to-face surveys** correspond to pyramid intelligence, with a division of labor and a logic of splitting up and standardizing questions. As for those who collect the results, they do not have a detailed vision, which disappears when the results are aggregated.

Pyramid-based collective intelligence has its limits, because unlike the original, evolutionary collective intelligence, the pyramid-based hierarchy is cumbersome and demonstrates its inability to adapt to the shifting, unpredictable ground of complexity.

**3) Swarm intelligence.** This form of collective intelligence is found in certain animal colonies. How can thousands or even millions of individuals, individually limited like birds, fish, bees or penguins, organize themselves into groups with a collective intelligence and incredible capacity for resistance and adaptation.

## **The Internet and global intelligence**

Developments in technology and the emergence of the collaborative Internet point to a new form of collective human intelligence - global intelligence. The emergence of wikis (such as Wikipedia) and free software are examples of collaborative work, where many individuals scattered across the planet work together. The contributors position themselves in an invisible architecture, without a hierarchical structure, in a democratic way.

Let's look at how *online* longitudinal qualitative research works in terms of global intelligence.

- With communities or forums, qualitative is ***freed from physical spaces (invisible architecture)***. There is no fixed organization in time and space (like a round table).
- Everyone in the group can ***acquire a vision of the project as a whole (holoptism)***
- **The long-term** nature of Qual *online* means that the community can be seen as an ***evolving organism***
- *Online* self-administered data collection makes it possible for a ***large number of people to work together in depth and creatively.***

Seen in this light, *online* research opens a new stage in collective intelligence. It's a new way of conceiving research, better adapted to complexity, fully collaborative, reducing the asymmetry between interviewer and interviewee.

### The gift of time

One of the key characteristics of *online* qualitative research is that it can take place over time. A Qual *online* forum or community takes place over time and operates as an evolving, iterative process.

**Table 7 - Face-to-face versus *online* forums**

The group, face-to-face interview	The Qual <i>online</i> forum
Encourages expression and reaction, everything done on the fly; once the group has finished, you can no longer participate.	Allows for spontaneous reactions, but also for reflection and distance: time for maturation
Separating the spheres of questioning and use	Possibility of interviewing respondents in their sphere of use

## Giving missions

*Online* qualitative research allows us to carry out assignments and test products in several stages. For example, in the case of a study on television viewing in the morning, individuals can be questioned about their daily viewing habits, before being asked to watch a show the following day. On D+1, they can react during the day to the show they saw in the morning, before watching another show on D+2, and so on. In this way, it is possible to follow the programming daily over the course of a week, without separating the sphere of use from the one of questioning.

## Towards participatory research

The timeframe is also very useful for innovation-oriented studies, where participants are required to accompany the research and development process. An online forum can react as and when concepts, products and communications are developed, keeping pace with the company. It's a three-way relationship, then, with the customer in the background. This requires a great deal of responsiveness on the part of the moderator.

By enabling a series of back-and-forth exchanges, *online* qualitative research marks the entry of research into the era of participation. Qual *online* is establishing itself as a multi-directional method of interviewing. It replaces the traditional one-way interviewer/interviewee relationship with a multiplicity of relationships with interviewees and those around them.

When all is said and done, the system generates a huge amount of data (150 to 400 pages of verbatims for a forum, hundreds of photos), which poses the challenge of dealing with the overabundance.

## GDPR and security requirements

Managing panels with nominative databases and collecting data online is a responsibility in terms of cyber security. In early 2021, hackers attacked a survey institute and demanded ransom. Every precaution must be taken to ensure the security of panelists' personal details and information. File transfers must use secure procedures and key data must be destroyed after use or stored in electronic safes. To prevent fraudulent access attempts, passwords must be used systematically, ideally with two-factor authentication. Every precaution must be taken to protect confidential data. Only the team working directly on the study has access to relevant information.

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Originally, qualitative research was mainly based on focus groups or interviews. These face-to-face meetings last a few hours and take place in physical locations, often equipped with one-way glass so that the customer can observe discreetly. Digital technology frees us from these physical and time constraints. It encourages the creation of virtual communities of consumers that can last several weeks and that can be followed virtually. Technology also encourages new ways for consumers to express themselves through text, audio, or video.

These new forms of questioning raise questions about the conditions for effective participation. First and foremost, consumers need to be selected and stimulated.

## Chapter 2: Encouraging consumer input

Qualitative research relies on the active participation of the public, who works to feed the research. Let's look at how these participants are motivated, depending on the questioning channel, and what are the keys to qualitative selection.

### The consumer's job

Qualitative studies are partly based on data produced by consumers (testimonials written in a forum or suggestion box, opinions, accounts of experiences, photos or videos, DIY tips, recipes, etc.).

These data are the result of what Marie-Anne Dujarier calls "The work of the consumer", in a work on the sociology of work. The author distinguishes two forms of consumer work:

- **Directed self-production** where the consumer is **forced to work**: outsourcing certain tasks to consumers, with the emphasis on saving time, autonomy (self-service at the petrol station, assembling Ikea furniture) and purchasing power.
- **Collaborative co-production** is when the individual is **encouraged to participate**: his or her contribution ranges from capturing data to creating works. This form of work is similar to participation in research.

Consumer contributions to brand initiatives can be categorized as follows:

- **depending on the stage of product development**: upstream, by participating in product design; downstream, by prescribing the product, promoting it or even providing after-sales service;
- **depending on the nature of the contribution and the degree of creativity required**: information, data, testimonials, tips, ideas or inventions, personal productions, works of art.

**Table 8 - Consumer work: types of contribution**

Coproductio				
↓ Information (data, profiling)	↓ Behavior (testimonials, accounts of product or human experiences)	↓ Inventions (new recipe, new concept, ideas box)	↓ Personal productions (photos, videos, amateurs)	↓ Works



Contribution to Creation

### Cooperation with interviewees

The marketing research sector in France takes the willingness of interviewees to participate in surveys for granted. It is true that we are fortunate to have a population that readily expresses itself in open-ended questions.

However, the fall in response rates for certain target groups, and the rise of a certain disaffection with surveys, raises the question of what motivates respondents to reply. The participation of interviewees cannot be limited in the long term to simple "nonchalant cooperation", as the academic Alain Garrigou puts it<sup>7</sup>. We need to aim for a partnership in which everyone benefits. A major challenge lies in renewing the population and getting respondents involved. We need to examine the levers of motivation to preserve this valuable source.

**Table 9 - Why take part in a study?**

	Motivations	Brakes
Feeling useful	Being consulted and getting things done	Too closed questioning
Comfort	Schedules, duration, contact,	Intrusive or disturbing questioning
Interest in the subject of the study	Learning, discovering ideas and tips, receiving feedback	Boring experience Boring questioning

<sup>7</sup> L'Ivresse des sondages, Paris, La Découverte, 2006

Share	Exchanging with others, comparing practices	No return
Incentive	Receiving a reward or symbolic gratification	Feeling used, lack of recognition

## Employee participation

As well as consumer surveys, there are also employee surveys: weekly, monthly, or annual social barometers to identify HR projects and commitment drivers, surveys on well-being and quality of life at work, support for transformation, surveys to keep in touch through teleworking, co-creation of the company project and raison d'être.

Employee surveys require a great deal of explanation upstream and feedback downstream. They involve large-scale and very open consultations, as well as co-creation workshops. The purpose of these workshops is to unite teams, co-construct solutions, accelerate the stages of transformation and explore the areas of unique social responsibility.

### A bit of theory

#### ***The importance of emotion***

Research in the cognitive sciences has highlighted the major role played by emotions and memory in the functioning of the brain. Since Descartes, reason and emotion have been regarded as opposites, the latter even being subordinate to the former: barring temporary disorders, it is reason that governs us. Even theories of left-brain/right-brain complementarity have always postulated the separation of reason and emotion.

The discoveries popularized by Professor Damasio (*Descartes' Mistake, Spinoza Was Right*), have shown that the opposite is true: not only are emotion and reason not opposed, but our behavior is above all guided by our emotions, which are the foundation of our reason.

This research confirms the need for surveys to capture consumers' emotional reactions. Standardized quantitative surveys where the interviewee simply has to tick a few boxes elicit little emotion. Yet emotion stimulates brain activity, enabling more accurate, more committed and more predictive responses. Open-ended questions have the merit of encouraging an emotional state by inviting interviewees to associate themselves with their feelings.



## Identification, selection, and recruitment of interviewees

One of the keys to the success of research is the ability to identify and recruit suitable profiles. There is a lot of talk about the risk of professionalizing consumers with black sheep who would turn them into a source of income. Of course, we need to be vigilant and know how to weed out profiles attracted primarily by the incentive. Above all, you need to have the resources to reach the right, motivated consumers.

Experience shows that core target consumers are more interesting to interview than occasional consumers or non-consumers. By regularly renewing their act of consumption, core target consumers are more aware of their perceptions and motivations and are in a better position to criticize. The key is to be able to select them.

### Recruitment in two stages

For recruitment to be successful, it is often necessary to consider quantitative requirements (contacting many potential participants) and qualitative requirements (selecting interesting and useful profiles) while respecting economic constraints. The Internet is a very interesting channel for meeting these requirements. When we created the TestConso.fr panel in 2000, we wanted to control recruitment and no longer depend on a traditional selection process. Very early on, we identified a screening/phoning system that has become the norm.

The ideal solution is to work in two stages:

- **A semi-open online survey** to select the most interesting profiles.
- **A telephone selection** based on the quality of the participants' speeches, identified through an in-depth telephone dialogue to ensure the relevance of the respondents (targeting, effective availability, ability to express oneself, etc.).

This pre-recruitment survey method has several advantages, as it enables to:

- contact participants quickly and set up a group in two days if necessary.
- reach rare targets effortlessly using panel information and surveys designed to interest the potential target.
- concentrate one's energy on listening to people who are available and interested, rather than looking for and convincing participants.
- offer an incentive in the low range to avoid regulars and ensure that motivation is linked to the subject rather than to remuneration.
- dialogue with the client on the reality of the profiles and choose the participants with full knowledge of the facts.

The recruitment survey is not intended to be representative, but it is an interesting stage to analyze:

- A detailed analysis of the recruitment process helps to place the profiles chosen in relation to those rejected.
- The recruitment phase can be likened to a preliminary survey.

Having your own panel is a key advantage, even for qualitative fields. It allows you to gain in quality, speed, and efficiency, thanks to the decisive advantage of the recruitment survey.

## **Face-to-face in the field**

Digital recruitment offers major advantages in terms of productivity, cost, and margin of error. It's easy to replace the wrong person online. Face-to-face recruiting has all the advantages of a human relationship, mobilizing all the sensory channels, the non-verbal and unconscious dimensions. Having received training in NLP (Neuro-Linguistic Programming), I've been made aware of the subtleties of human interaction: congruence, cognitive processes, internal states, external behaviors. Interacting well with another individual means observing and synchronizing, considering the words used, breathing, voice and the sensory channels favored. To use certain facilitation and human interaction techniques, face-to-face meetings are essential.

We can also see that qualitative researchers who are used to face-to-face contact are often frustrated with having to go 100% digital. Traditional qualitative researchers have a sensitivity and empathy that thrives on a physical, human relationship with consumers.

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Research should be a rich and stimulating experience for interviewees. This requires a human interviewing process, emotional involvement and an incentive that is at least symbolic. Recruitment is made easier by digital tools, which can be used to identify a pool of volunteers who match the criteria. All that remains is to carry out the final selection by phone, to ensure that it is of the highest quality.

*Online* qualitative research began in France around 2006 with the democratization of the internet. They have coexisted with face-to-face research until becoming essential in 2020 with the pandemic. Methods have diversified, drawing inspiration from virtual forms of interaction (forum, blog, chat, videoconference, webinar, community) and available software.

## Chapter 3: Using *online* qualitative data collection tools

Digital technology is transforming the way we gather qualitative data. It loses in psychological depth, but gains in observational power, productivity, and the ability to record realities on the ground.

Qualitative methods date back to the pre-computer era. The main medium for gathering information was the spoken word, the story. Consumers were interviewed by human science specialists who led interviews or round tables. This gave rise to sessions that could last half a day or even a weekend, with mime exercises, dreaming aloud, fights and even psychodramas.

*Online* methods completely change the role of the moderator. Responsibility for expression is shifted to the interviewee. The challenge is to get them to participate by asking open-ended questions and producing photos and videos. Some software, such as Klaxoon, have features that encourage creativity and group dynamics. But most contributions are based on self-administration.

### **Self-administered *online***

With self-administration, the interviewee answers questions independently and without assistance. Self-administration avoids the bias associated with the influence of an interviewer but requires questions that are easy to understand.

The absence of an interlocutor encourages them to put into words or signs what they would have expressed non-verbally (laughter, intonation, facial expressions, etc.). With voice recognition software, speech can be automatically transcribed into text.

With video, the smartphone and digital technology, the self-administer is broadening his or her techniques of expression and moving towards autoethnography: voice or dictated response, screen capture, annotated image, story or commented video, self-video. It is omnipresent in *online* Qual.

## International qualitative methodologies

GreenBook<sup>8</sup> is an American organization that surveys institutes and sponsors around the world about their practices and publishes the GRIT Report (*Green Research Industry Trends Report*) every year. The *Insight Practice Edition* focuses on tools and methods. Here is the 2020 edition:



The 2020 sample is made up of 274 buyers and 769 institutes, with more than 60% from North America, 20% from Europe and 10% from Asia-Pacific. 92% of research players use quantitative tools and 85% qualitative methods.

The GRIT report points to the adoption of new methods with increasing use of the smartphone (dedicated mobile data collection studies, mobile qualitative, mobile ethnography) alongside social network analysis and Big Data.

Greenbook highlights the shift from qualitative to digital from 2020.

Hereunder are the details of the methodologies used in 2020 according to GreenBook. The digital will dominate, but face-to-face and telephone contacts will continue.

**Table 10 - GRIT What qualitative methods in the USA in 2020?**

	Regular use	Occasional use	Total
Semi-structured interviews with webcam	41%	33%	74%
Online focus groups with webcam	40%	34%	74%
Online communities	35%	36%	71%
In-depth telephone interviews	31%	32%	63%
Face-to-face focus groups	31%	38%	69%

<sup>8</sup> <https://www.greenbook.org/mr/grit/usage-of-established-methodologies-top-quantitative-and-qualitative-research-methods/>

In-depth face-to-face interviews	29%	38%	67%
Mobile surveys (daily newspapers, image collection, etc.)	28%	40%	58%
Forum Qual <i>online</i> ( <i>bulletin board</i> )	18%	37%	55%
Interviews and observations at the point of sale	16%	37%	53%
Written focus groups in chat	14%	32%	46%
Semi-structured <i>online</i> chat interviews	11%	27%	38%
Blog watch	11%	28%	39%
Telephone focus groups	8%	17%	25%
Automated interviews thanks to Artificial Intelligence	5%	17%	22%

### **Online qualitative surveys**

Established in the United States in 1998, the market for online qualitative research has gradually expanded in France.

The year 2020 has seen the widespread use of *online* qualitative research, including for in-person consumer meetings, which are now being transformed into video conferences. Among the various online qualitative methodologies, we can distinguish individual, collective, and mixed methods. In face-to-face interviews, there is a clear separation between individual questioning (interviews, observation) and collective questioning (group meetings).

Digital technology makes it possible to compare respondents' answers with those of others and to alternate or mix approaches:

**Table 11 - Qual *online*: individual and collective?**

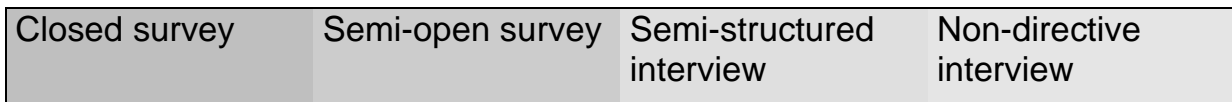
Individual methods	Mixed methods	Group methods
Semi-open online survey	Interactive suggestion box	Focus group chat

Interview by e-mail, messenger, or chat	Consumption log via blog or mobile app	Focus group with webcam or video
Webcam or video interview	<i>Online</i> qualitative forum	Virtual creative workshop
	<i>Online</i> communities	

In the *online* qualitative landscape, we include semi-open surveys, whereas most institutes consider surveys to be a quantitative method.



There is a continuum running from "Qual" to "Quant". The survey can be seen as a structured semi-structured interview.



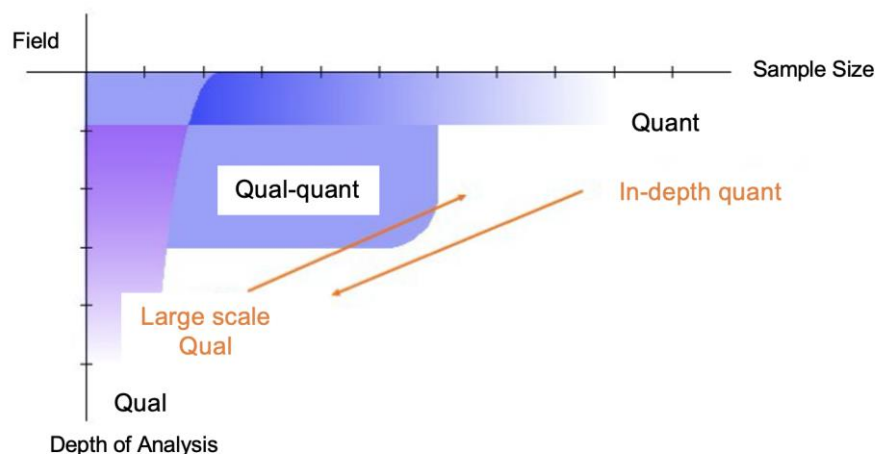
The use of semi-open surveys opens the field of large-scale Qual and in-depth Quant. It's a Qual-Quant approach.

### Qual-Quant, the 3<sup>rd</sup> way

To illustrate the Qual-Quant approach, we are using a mining metaphor. Let's think of a subject of study as a piece of ground that needs to be probed:

- The qualitative approach (groups, interviews) involves digging deep into a small area.
- The quantitative approach, on the other hand, involves covering a large population with close-ended questions, covering the ground at a shallow level.

**Table 12 - Qual-Quant approach: in depth and on a large scale**



There is a third way, Qual-Quant, which involves digging deep into a large area. This third approach is facilitated by information technology and the Internet, which make it possible to collect and process unstructured data at a massive scale. It's as if we could move the soil over a large area and exploit this mass. This 3<sup>rd</sup> way, both in depth and on a large scale, can take different forms.

### **Large-scale *Online* qualitative research**

The most obvious form of large-scale Qual consists in interviewing populations of a hundred or so people with open-ended questions. The advantage of such an investigation is that it saturates the field of possibilities to understand and prioritize perceptions. Experience has shown that with 100 to 200 targeted responses, the range of reactions can be inventoried, and the subject covered. Beyond this sample size, the contribution of information becomes marginal.

In a study for the Gulli television channel<sup>9</sup> on the relationship between children and screens in 2008, we asked around thirty parents to photograph their children in front of screens and to answer a few open-ended questions. We suggested situations to be photographed (in front of the television, a computer, console, tablet, etc.) and asked them to comment on the photos. This survey generated over 80 photos with comments. It brought to light the different types of posture children adopt when faced with screens (sleeper, watcher, cocoon), revealed the immersive power of screens and the low degree to which screens can be adapted to children.

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<sup>9</sup> [https://testconso.typepad.com/semiologie/files/qualiquanti\\_gulli\\_enfants\\_et\\_crans\\_2\\_.pdf](https://testconso.typepad.com/semiologie/files/qualiquanti_gulli_enfants_et_crans_2_.pdf)



**Table 13 - Linking Qual and Qual-Quant**

Qual groups	The Qual-Quant survey
Focus Group	Individual interviews
Limited numbers: 20 to 30 people for 2 to 3 groups	Larger workforces 100 to 300 people
Face-to-face (oral presentation, interaction with the presenter, non-verbal communication, sensorial reactions)	Self-administered (written moderation, absence of influence from the interviewer and between interviewees, spontaneity)
Local interrogation (2 or 3 sites)	National survey (online)
Exploratory questioning (ability to improvise, creativity, looking for ways to optimize)	Structured questioning for systematic analysis
Focus on core target + other targets	Targeting a wider audience

### ***Crowdsourcing, anyone's creativity***

*Crowdsourcing* is another large-scale use of Qual. It consists of soliciting more or less expert profiles to gather mass data. This could be consumers from all over the world, a network of students or trend experts who will be invited to share their findings. The challenge is to generate ideas and harness the creative power of the crowd to extract valuable insights. The aim is to produce a wealth of original ideas.

*Crowdsourcing* can be used to address a wide range of issues:

- identify innovative locations
- visualize visited places
- get consumers to work on a benchmark
- enriching ideas



With *crowdsourcing*, you mobilize the strength, diversity, powers of observation and creativity of a network of volunteers.

## **Online qualitative research formats**

### **Section 1.01      1. Queries by blog and then by mobile application**

This methodology corresponds to the need to follow an individual over time. Before the advent of the Internet, interviewees produced a handwritten consumer diary or logbook. Sometimes they were given a disposable camera to collect images.

In recent years, there has been a surge in the number of diary or journaling applications designed to organize digital memories.

These free or paid applications (Keep, Evernote, Day One, Journey, Momento, Everyday, Daylio, Grid Diary, 365 &) allow you to keep track of your daily life (drawings, photos, videos, geotagged thoughts, moods, activities, food, travel, goals, hobbies, etc.) in complete confidentiality.

Research institutes have followed this practice and created tools to enter the lives of consumers. Ipsos<sup>10</sup> has created a proprietary AppLife application<sup>11</sup> for exploratory research (mobile diaries on the daily use of a product) and for gathering feedback *in situ* (at home, in the workplace or at the point of sale).

Smartphone applications such as Indemo, OvertheShoulder, Civicom and Touchstone Research make it easier to produce and transmit feedback.

### **Section 1.02      2. Internet interviews**

The methodology of individual interviews via the Internet has developed considerably since its inception. For a long time, telephone interviews were the most suitable means of remote interviewing. It offers a high quality of exchange and great flexibility. Initially, *online* interviewing consisted of conducting a written interview live (via a *chat room*) or asynchronously with a list of questions sent by email.

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<sup>10</sup> <https://www.ipsos.com/en/mobile>

<sup>11</sup> <https://www.ipsos.com/en/applife>

What changed with the arrival of videoconferencing software such as Zoom, Teams or Gotomeeting was the addition of the webcam. We were finally able to interact visually with the interviewee, using all the non-verbal elements, and ask them to show us their environment. Another major advantage is the ability to show material to interviewees remotely.

**Section 1.03      3. Online focus: from chat to videoconferencing**

Online focus groups have also evolved considerably. This began around 2005 with group meetings facilitated over the Internet using specialized *chat* software (virtual lounges). In these *chat* meetings, it is the moderator who controls the mechanisms and logic of the discussion. Selected Internet users join the virtual "meeting room" and type in their answers to the questions asked by the moderator. The moderator has prepared his or her questions and reminders and can react very quickly by prompting an individual or the whole group.

Videoconferencing has transformed online consumer meetings. The first advantage is that participants can be brought together without space constraints.

The other advantage of videoconferencing is all the interaction software tools. These can be used to integrate "*whiteboard*" modules where participants react to visual material and express themselves by circling, selecting, and arranging the elements being tested according to their preferences (cf. logo testing, print and web advertising, etc.).

**Table 14 - Consumer meetings: in person or by videoconference?**

	Meeting room	Videoconference meeting
Duration	2h30 to 4h	1h30 to 2h30
Number	7 to 10 participants	5 to 12 participants
Benefits	Group dynamics, non-verbal language, synchronization of participants, physical or projected stimuli Room with one-way glass for monitoring	Flexibility of organization, ubiquity for national or international sites, stimuli via everyone's screen Virtual monitoring by customers and employees
Disadvantages	Unique location, travel constraints, position of participants in the space which can condition relationships	Technical connection problems, inability to touch products, background noise (cicadas singing, noisy surroundings)

Participation	Audio, physical, non-verbal, flip chart	Audio, webcam, chat, screen sharing, whiteboard
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Videoconference meetings require you to limit the number of people speaking, as it is more difficult to get the message across. With a microphone that only accepts one person at a time, overlapping must be avoided.

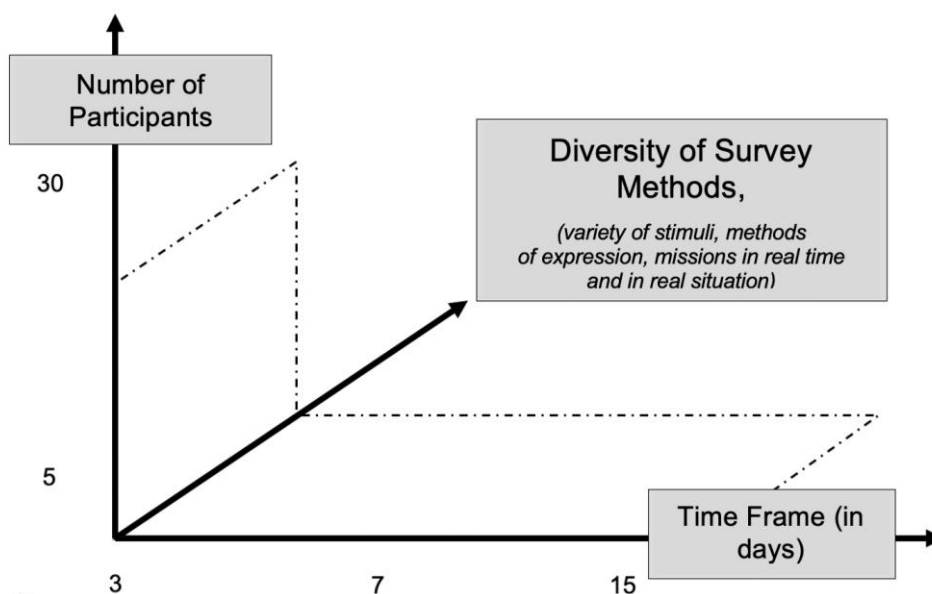
Videoconference meetings are an opportunity to rethink the use of focus groups. It is interesting to:

- hold meetings after a forum phase, when participants have had the opportunity to express themselves individually and are familiar with the subject.
- organize several successive videoconferences with the same participants (which would be difficult or very costly in the physical world)
- conceive the meeting in terms of the stimuli to be presented.

#### **Section 1.04 4. Bulletin board or online qualitative forum**

*Bulletin* board methodology, which first appeared in the United States in 1998, has established itself as the most in-depth and comprehensive online qualitative research technique. It is also known as a Qual *online* forum. Many research institutes use the term *online* community, even if it involves 10 to 30 participants.

**Table 15 - *Online* forum: variable geometry methodology**



The method used consists of an asynchronous dialogue via the Internet between a moderator and the participants, using different modalities. Depending on the situation, the interviewees can answer the questions:

- without seeing other people's answers;
- accessing the other answers only after having answered them themselves;
- seeing the other answers straight away.

The Qual *online* forum makes it possible to organize real group discussions, where participants can see and react to each other's answers, as well as individual phases where they are assured that their answers remain confidential.

Face-to-face group	<i>Online</i> forum
In-room entertainment, isolated in a neutral room with one-way mirror	Immersive animation (natural context) with missions and meetings
Close injection of stimuli (over 2 to 4 hours)	Progressive injection of stimuli and subjects over several days
Collective dynamics	Individual and collective relaunch procedures
Presenter very present (speaks 1/3 of the time for a 3-hour group)	More say for participants

Working over time and the flexibility of questioning mean that the questioning has to be scripted in such a way that participants alternate between periods of reflection and more playful breathing space, periods of individual questioning and periods of group discussion.

Since the *online* qualitative forum is asynchronous and self-administered, the questioning must be well mastered beforehand, even if adjustments can be made as the fieldwork progresses. This involves:

- controlling the number of open questions per questioning session (5 to 15) and the response time per participant (30 to 45 minutes)
- encouraging wide-ranging questions at the outset, encourage extended answers and avoid overly methodical or academic lists of reactions
- showing that the answers are used to enrich the questioning from one day to the next

The founding principle of the Qual *online* forum is the time frame participants must answer the questions asked. Each respondent spends 30 minutes to 1 hour a day answering, from their own terminal (computer, mobile, tablet) and at their own pace.

**Table 16 - Type of study and time spent by consumers**

<b>Type of study</b>	<b>Expression time</b>	<b>Total time</b>	<b>Mode</b>
<b>Focus groups</b>	2 groups of 3 hours	6 hours	collective
<b>Individual face-to-face interviews</b>	12 people X 1 hour	12 hours	individual
<b>Individual telephone interviews</b>	20 people X 1 hour	20 hours	individual
<b>Online forum</b>	12 people X 9 days X 45 min/day	72 hours	Individual and collective
<b>Survey with 12 open questions</b>	300 people X 15 min	75 hours	individual

In addition to time of availability, the online forum offers another advantage: participants can respond whenever they wish. This flexibility makes the methodology particularly suitable for surveys requiring the participation of very active people.

## A bit of theory

### ***The Qual online forum, the new frontier of qualitative research?***

Beyond its most directly operational aspects, the forum is shifting the traditional categories and boundaries of qualitative research. Let's look at the main changes brought about by the Qual online forum.

- **It establishes a new relationship with time**
- **It blurs the boundaries between individual interviews and focus groups**
- **It inaugurates a hybrid mode of expression, between the written and the spoken word, between text and image.**

**Table10 - Interviewees' expression: oral or written?**

	<b>ORAL</b>	<b>WRITTEN</b>
<b>Function</b>	Spontaneous and informal expression	Official and more solemn expression, conservation, distancing and reflection
<b>Disadvantages</b>	Words fly away and are forgotten	Writings are binding on their authors (annoying or inhibiting)

### **Section 1.05      4.1 Applications of the Qual online forum**

The characteristics of the forum make it particularly suitable for certain uses.

- Query close to user experience
- Evolving interaction between pollster and respondents

Here are a few examples of *bulletin board* and *online* forum applications that we have tested at QualiQuanti:

- evaluation of all points of contact for a brand or product (360°);
- study of an extremely large corpus, with almost a hundred examples to be viewed over ten days;
- study of the imaginary world of a brand, using projective methods such as virtual collage (selection of images or photos from a database);
- advertising communication test with progressive evaluation of the uses of the category, the perception of the product, the brand, the current communication, the competitive context, etc.

## **Section 1.06      4.2 Creative forum facilitation techniques**

The *online* forum opens a very wide range of facilitation techniques. Here are a few examples suggested by Claire-Marie Lévêque from Happenability.

The moderator can give the participants tasks based on creative techniques and ask them to produce:

- reports, a mock article, a situation under pressure to project themselves into problem solving;
- mood boards using images found on the web;
- draw pictures of their vision of their neighborhood and present them to others;
- a one-page storyboard or comic strip, or a story about how a product is used.

These recreational activities, with no demands on the formal quality of the finished product, create emulation and bounce-back among the participants.

To diversify participation methods, respondents can play or even compete. It is possible to organize synchronous meetings within an asynchronous system, either in chat mode or videoconference mode.

## **Section 1.07      4.3 Measuring intensity in small samples**

Qual *online* software offers flash survey modules. These surveys generate interest, purchase intention or satisfaction scores for a small number of individuals.

The intensity of an experience is just as predictive of success as the number of people interested. The high satisfaction score, revealing a level of enthusiasm, is more informative than the total of "average satisfaction + high satisfaction". Intensity is assessed on both small and large samples.

**Table 17 - Small and large samples: which measure?**

	Small sample	Large sample
Sample	12 to 50 individuals per qualitative survey	100 to 2000 individuals per survey
Example	Test of 200 20-second videos with 12 people	Test of 50 umbrella designs with 300 people
Questioning time	2 to 10 hours over several days or weeks	5 to 20 minutes
Measurement on a scale	Intensity measurement	Coverage measurement + intensity measurement
Open feedback	Systematics	Partial
Benefits	Compare and rank many objects. Combine scoring and feedback.	See how many are members, who is a member

**Section 1.08      5. Qual online software**

After using the American Qualboard software, which, along with itracks, was one of the few available in the early days of *online* Qual, the profession saw a multitude of solutions flourish: Kernwert, SoQual, Krealinks, Dialogmaker, LiveLoop, Incling, VisionsLive, Recollective, FocusVision and Collabito.

In this book, we will look at three solutions that we have tried out: Krealinks, WhatsApp and Bilendi Discuss.

Krealinks is a platform available in more than 150 countries with a full range of *online* exchange tools (*bulletin board*, communities, online meetings, etc.) which exists since 2009.

WhatsApp is a mass-market application for private discussion groups that can also be used to host forums.

Bilendi Discuss is a tool where participants choose the response channel that suits them best, including SMS, email, Messenger, WhatsApp, Slack or LinkedIn Message in the near future.



**Section 1.09      6. Online communities, from 20 to 20,000 participants**

An *online* community is a public or private social network that consumers join to discuss a brand, products, or services. A community can last from a few days (short-term or pop-up community) to several months (long-term community) or even several years. Community members are regularly involved in synchronous or asynchronous activities.

**Table 18 - The *online* community: closed or open?**

Closed community	Open Community
50 to 2000 people	1000 to 50,000 people (no limit)
All members are active and must participate regularly in the various surveys conducted on the platform.	Wears the brand colors and has inactive members
Moving towards an <i>online</i> forum	Moving towards a proprietary panel: <a href="https://voicebox.curo-group.co.uk/auth/sign_in">https://voicebox.curo-group.co.uk/auth/sign_in</a>

Participants receive regular tasks (at least one a week) The community is led by discussion "facilitators" who create a certain familiarity and habits.

**Section 1.10      6.1 The objectives of an online learning community**

The study communities meet several objectives that will evolve as the methodology develops and its mastery is perfected.

Here are the main objectives identified:

- Get immediate and rapid feedback on a product, customer service, sales support, advertising, recruitment campaign, the company's corporate image, etc. It's a tool dedicated to all the company's departments: R&D, Sales, Product Marketing, Customer Relations, HR, General Management, which facilitates decision-making in real time;
- Helping the creation and ideation process: the creative power of brainstorming to develop concepts: new services, new uses, new ideas;
- provide a natural public relations tool for viral marketing: we recruit the core target and *early adopters* to create buzz.

## Case Study

### **Some examples of online communities**

The "Stars Insight community" is an online community developed by TNS for Mercedes-Benz (Germany). It brings together 500 participants a year who are questioned on marketing issues relating to the German automotive industry. The community platform includes questionnaires, online forums and focus groups, creative competitions and a free expression zone.

Since 2018, Béatrice Maccario from Krealinks has seen a rise in requests for "*long term communities*" or "*Insight communities*" of 100 to 500 people, with the need to be able to conduct both qualitative and quantitative research over a long period. It cites a number of examples, including a community of several thousand members for Zalando, which is present in various European markets, a Generali France community that enables the brand to interact with its customers, and a community of several thousand '*movie lovers*' in the United States for a subsidiary of NBC Universal.

### **Section 1.11      6.2 Online communities versus ad hoc panels**

**Table 19 - Participation: panel or study community?**

<b>Ad hoc panel</b>	<b>Study community</b>
Each individual is isolated	Each individual is "in society"
Panel members are free to accept or decline invitations.	Each member of the community is (more or less) obliged to participate whenever they are asked
There is no systematic interaction between panel members	There is systematic interaction between members of the community
A member is a "panelist"	A member is a "co-researcher"

### **Section 1.12      6.3 Consultation platforms**

Some players are setting up consultation systems for very large populations. The public broadcasting companies embarked on this approach in 2018 and again in 2020. In 2018, more than 120,000 listeners and viewers produced more than 400,000 comments. By the end of 2020, just over 20,000 people had contributed and over 200,000 comments had been generated. The process carried out with

OpinionWay involved opening an account and filling in a profile. Subscribers were asked 21 open-ended questions, with no obligation and the option of answering several times. The aim was to understand their relationship with public broadcasting and their expectations in terms of content and formats.

The range of online questioning tools is vast and variable: individual or collective, involving tens or thousands of participants. Practical experience shows the value of using a combination of methods depending on requirements.

As well as interviewing consumers, the web is a vast library of data that can be used for qualitative research. Documentary research is a family of studies in its own right within qualitative research.

## Chapter 4: Successful document exploration

Marketing research is benefiting from an increase in web-based data. Technological resources make it easy to create bespoke databases on WordPress or YouTube. To understand developments, it is useful to monitor experiential innovations, new products and services, editorial formats, sociological behavior, and micro-cultures.

### A mountain of qualitative data

The digital world and the web provide easy access to a wealth of data: articles, newsletters, influencers, studies, testimonials, product information, photos, videos, social media, etc. Numerous tools facilitate this monitoring: Crawler, Pocket, Inoreader, Google alerts, Panda, Feedly, Netvibes, etc. The Anglo-Saxons call this documentary work "*desk research*". There is a wide range of free and paid sources: trade associations, specialist press, databases, off-the-shelf studies, etc.

But monitoring is not limited to collecting information via your computer. You have to go out into the field, observe where products are sold and consumed, buy them, taste them, live and collect experiences.

Software can be used to extract the available material. This software is best suited to capturing textual content. We will first look at the potential of visual data before returning to textual content in the chapter on *social listening*.

### The proper use of qualitative data

For quantitative data, the focus is on the representativeness of the samples. The aim is to be able to reproduce proportions to simulate a defined population. For qualitative data, the aim is to cover and illustrate different types of situations. Experience shows that a critical mass of cases is needed to understand a phenomenon.

To build up an interesting body of documentation, you need to pursue several objectives simultaneously:

- to cover the different facets of the universe;
- to look for innovative, original and inspiring examples that stand out from the crowd;
- to identify examples that question the norm and foreshadow new uses;
- to look at all the dimensions of the universe (name, visual identity, design, arguments, communication, instructions for use, composition);

- to focus on the sub-family to which the client wishes to belong.

To understand a world, you need to bring together several dozen to several hundred examples. This is the prerequisite for drawing up an overview, identifying rules and anticipating developments. This saturation technique based on a large corpus analyzed in depth also makes it possible to become the benchmark for the subject in question.

## Case Study

### ***Overview of plant-based meat substitutes***

For example, to understand the phenomenon of plant-based food products, it is useful to review several dozen or even hundreds of dry and fresh products. This allows us to identify five product families, ranging from meat substitutes (which imitate the codes, shapes and textures of meat) to plant-based alternatives:

- vegetarian meat substitutes: steak, burger, escalope, sausage, nuggets, ham
- vegetable-based cooking aids: minced meat, bacon, matchsticks, sliced vegetables
- vegetable-based ready meals: pan-fried dishes, lasagna, ravioli, polenta, bowls, dahl, curry, falafels, etc.
- vegetable cakes: galettes, fried, croquets
- raw plant products: tofu, seitan and tempeh

This scan will help you to understand these paradoxical products, which are both healthy and industrial. They are made up of valuable ingredients (cereals, pulses, vegetables, seeds and oilseeds, spices, dried fruit) but are processed. They cover a wide range of consumption occasions, but are presented as specialized products. By flirting with dietary specialization and special diets, they remain on the fringes of our habits. Their taste and qualities are uneven, with both good and bad surprises.

## The macroscope for deciphering complex environments

Joël de Rosnay's book *Macroscope, Towards a Global Vision*, published in 1975, defends the idea of a systemic analysis adapted to the observation of complex environments.

**Table 20 - Processing qualitative data: multiplication and reduction**

<b>Data multiplication: telescope</b>	<b>Data reduction: microscope</b>
Observation of hundreds of examples	Focus on significant examples
A body of work that seeks to cover all aspects of reality	Consideration of all the facets of an object
Get an overview, identify good practice	Carry out a very detailed analysis, looking at all dimensions
Requires effort to collect, classify and ensure completeness	Requires analysis and in-depth study
Global vision of the system and encyclopedic knowledge	A detailed understanding of cells and their mechanisms

## Hyperwatch or width and depth of analysis

This two-way approach, known as hyperwatch, has been theorized by phenomenology. We speak of "eidetic" variation to imply that a phenomenon emerges when one or more of its dimensions are varied. Essence is never fully realized in a single incarnation. It is by observing variations that we can acquire a good knowledge of the object and identify its elements of strength. The method involves analyzing a phenomenon by observing a cloud of similar manifestations.

### Case Study

#### ***The dynamics of reality TV***

Here are some of the results of a study carried out when reality TV first appeared, based on an analysis of around thirty shows.

The novelty of reality TV lies in the status given to the anonymous:

- in terms of role: anonymous people make the show;
- in terms of profile: they are ordinary people;
- in terms of treatment: over a period of several weeks.

International reality TV shows the recurrence of a number of decisive factors:

- a tendency to mix genres (fiction, games, reality, interactivity);
- the emphasis on the lived experience of the protagonists and on expressing their feelings about this experience;
- a focus on the group rather than the individual. In reality TV shows, the relationship between the participants becomes essential;
- shows that take place over time, so that you can get to know the anonymous people and follow their development;
- shows that are interactive with the audience (viewers influence the course of the show).

The more or less exhaustive combination of the mechanisms described above produces novel television effects for the viewer:

- the cumulative benefits of listening ;
- an ambiguous and impure register, as in real life;
- content plasticity ;
- promoting experience and intimacy.

## **Producing clean data**

There are various ways of compiling a document search:

- using available data: via search engines and reference sites or with freelance databases
- by producing original data thanks to the research team and consumers.

Some content, such as advertising, is only accessible temporarily. Video recording has the advantage of guaranteeing the preservation of the medium. For proprietary material, all you need to do is take screen captures (photo or video captures), photograph or film the real thing.

In April-May 2020, during the first confinement, two hundred restaurants forced to switch to takeaway sales were scrutinized<sup>12</sup> with the aim of highlighting the sector's adaptation in terms of offerings, recipes, packaging, space planning, communication, prices, and opening times. The idea was to compare, to look at the Facebook and Instagram accounts, to order, to test the dishes, to audit the menus and the physical and digital tools. The most instructive thing was to order the different formulas and experience them together. We were able to organize lunches with menus from several restaurants. These experiences enabled us to appreciate the packaging, the chefs' explanations and little words, the quantities offered, the visual rendering and the suitability of the dishes for reheated and remote consumption.

Here is an article on the key results:



## **Creating structured databases**

The risk with documentary research is that you will be swamped by the sheer number of examples. There are various ways of finding your way through the mass of qualitative data:

- Produce a series of PowerPoint files with key images of the situation observed, classified according to different criteria
- set videos available via YouTube or Vimeo to confidential mode, with tags to make them easier to find
- create a database on WordPress to build an observatory on a given subject

## **Thirty years of documentary analysis**

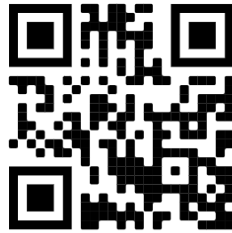
QualiQuanti's research work has led us to carry out several hundred documentary surveys. Each study began with the creation of an observatory made up of a multitude of examples.

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<sup>12</sup> <https://www.qualiquanti.fr/restaurateurs-mieux-vendre-a-empporter>



On brand content, a database of over 7,000 cases has been created at <http://veillebrandcontent.fr/> :



Each case is described, with photos and links to the operation. Cases are listed not only by sector, but also by genre (podcast, consumer, short film, events), by brand and by theme. This observatory makes it possible to carry out *ad hoc* analyses in a very short space of time. In particular, a decoder of brand content in the insurance sector, with over 350 examples, has been developed.

All the work mentioned above should help you to achieve one objective: to be able to go round the world of a subject in a few minutes by browsing through structured documentary material. Reviewing, analyzing, and comparing a large mass of qualitative data gives you a concrete and detailed understanding of the subject. It gives you the super-power to understand the phenomenon in all its dimensions and to glimpse operating rules, areas for innovation and improvement, and developments.

## **Knowledge management**

Thirty years of research and document monitoring have enabled us to build up a body of expertise that complements and enriches our work on brands, media, advertising, *retail*, and locations. We have built bridges between teleshopping, advertorial, *native advertising*, and product content. All these modes of communication are based on a pragmatic relationship with the product, on putting it into a situation of use alongside more contemplative advertising. Research into brand content has benefited from work on advertising intrusion and editorial. To understand how brands become media, it is useful to have analyzed how media work. Reviewing the different communication techniques provides a map and enables us to think about the future of advertising.

To maximize the power of qualitative research, it is useful to implement a *knowledge management* approach. The principle is to identify, analyze, organize, store, and share knowledge within an organization.

## Testing a multitude of stimuli

One way of generating added value is to get consumers to react to the corpus. Methodologies such as the *online* forum make it possible to progressively test dozens or even hundreds of stimuli over a period of 15 days to 3 weeks. This encourages comparisons and enables lessons to be learned. Every effort must be made to facilitate access to the cases (video links, playlists, audio content, multi-visual aids, presentation sheets, example books, products sent by post) and feedback by coding the stimuli. Videoconferencing is also very well suited to the presentation of stimuli, as each participant can see the different examples in full screen mode, and the presenter can switch easily from one stimulus to another.

These multiple case injections are highly productive. By eliciting enlightened feedback, they help to situate the different facets of the universe under consideration. Having tested several corpora, we have come to the conclusion that this approach provides a concrete understanding of what works and illustrates the results and recommendations.

Based on this kind of documentation, we can get reactions from consumers as well as experts. The ideal is to be able to enrich the monitoring work with a semiological analysis phase that draws all the lessons from the accumulated material.

## Chapter 5: Extending the analysis with semiology and culture

At the heart of qualitative research, semiology provides concepts for understanding and analyzing. Semiological analysis is useful for understanding a sector and deciphering a brand's entire universe, its brand culture. It is this type of analysis that maximizes the power of Qual. From chaos, it offers an in-depth reading of the data.

Semiological and cultural analysis draws on all the human sciences: semiotics (the science of organizing signs and discourse), semantics, symbolism, pragmatics, ethnology, aesthetics, sociology, and anthropology. All the hermeneutic disciplines that help us understand meaning are relevant: linguistics, but also art history and philosophy. The "*cultural studies*" research movement on everyday cultures is helping us to rethink our practices. Semiotics goes far beyond the application of abstract analytical grids such as Julien Greimas' semiotic square. It is a mobilization of culture to give the right perspectives and relief to conceptualization.

Semiological analysis is a historical analysis that reveals the social meaning of brands based on the cultural history of the products. Pastis, for example, derives from the ban on absinthe, which had disastrous effects. Semiological analysis also sheds light on cultural history, the history of representations and technical developments.

## Case Study

### ***The cultural history of champagne***

Champagne, a sparkling wine dates to the 18<sup>th</sup> century whereas the tradition of still wine goes back to antiquity. Historically, it was subject to the advent of the closed bottle: for wine to sparkle, glass technology had to make it possible to manufacture bottles that were strong enough (until then, the glass decanters used were so fragile they had to be fitted with a metal frame) and a strong closing technique (the cork stopper) to preserve the wine but also give it new properties such as effervescence. From the outset, champagne has been an innovation, a brutal and scandalous revolution that took place against the backdrop of the sexual and intellectual freedom of the Age of Enlightenment. The revolutionary nature of champagne stems in particular from its foam, its effervescence: until then, drinking wine that foamed seemed an absolute heresy. Until the eighteenth century, beer was what frothy wine was, a popular beverage that was in no way a symbol of exceptionality, nor was it appropriate for the meals of the king and his court champagne has three fundamental characteristics that distinguish it from other alcoholic beverages such as wine or beer.

It has a euphoric effect on the mind. It is an inspiring, harmonious and expressive euphoria that awakens all the senses and clears the mind. The clarity of white wine and its sparkle are associated with lightness of spirit. It is opposed to drunkenness, confusion and vulgarity. This theme of inspiration is often repeated in champagne advertising.

## **Deciphering brand culture**

Brand culture is a holistic way of looking at a brand. Through its products and services, but also through the places where it is embodied, its style, its values, its ethics, its history, its people, its experiences.... In short, everything. Because a brand is a cultural universe, a composition, a construction over time. The objective for a brand? To create a legible whole that can be understood intuitively. Those who shape it must be attentive to words, colors, materials, light, and sound. In short, to the environment in which the brand will operate. The challenge? Finding a semantic consistency that translates into an ability to communicate meaning to the consumer. The brand manager thus becomes a narrator, an architect, or even an orchestra conductor to find harmony; an artistic director to ensure consistency and renewal. What about the consumer? The consumer sees all the facets of the brand, detects its coherence but also its dissonance. They get involved, buying a product but also a little piece of their world.

The systematic analysis of a brand universe (brand culture audit) is applied by considering all the facets of a brand universe.

## Quantitative content analysis

In 2015, for a study on pop-up stores, a survey of around fifty cases in photos and videos was first provided by the client, the property company Klépierre. This research was supplemented by *online* monitoring and visits to locations that were filmed and photographed. This work yielded 308 cases created by 250 brands and led to an analysis of the sector breakdown. Of the cases identified, 23% related to fashion and luxury goods, 12% to food and 11% to multimedia products and services. Other sectors such as alcoholic and non-alcoholic beverages, cosmetics, and distribution each accounted for between 8% and 5%.

This study on pop-up stores, which combines monitoring, semiological decoding and qualitative research, was the subject of a white paper<sup>13</sup> published by Klépierre:



It includes a historical analysis of the origins of pop-up stores and an analysis of the characteristics of pop-ups (functions, duration, locations, relationship to space, public perception, conditions for success, creative potential). The book is peppered with examples and illustrated with numerous photos.

## Semiological and cultural analysis

Semiological and cultural analysis consists of identifying and describing each of the components of a product or communication, highlighting its structure and the way it is put together. In this way, we can gain a better understanding of how they work and situate them in their competitive and cultural environment...

This is done to clarify all the dimensions of form, style, content, and relationship with the consumer of which the object is composed, as well as the affinities and differences with competing products. Analysis by issue helps to structure understanding, to overcome prejudices and to detect points which are sometimes implicitly perceived, but which require a clear and problematized formulation.

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<sup>13</sup> <https://www.qualiquanti.com/wp-content/uploads/2019/03/Livre-Blanc-Pop-up-Store.pdf>

In the case of packaging, the logic of form, color coding and signage, the relationship between container and content, the expression of the organic composition of the product in the packaging, the coherence of the formal expression of the brands, etc. will be examined. In the case of a magazine, we will be looking at how the relationship with the reader is constructed, the newspaper's value system, the organization of meaning, reading paths, editorial style, etc.

The analysis is even more effective because the semiologist is supplied with the results of consumer research, food for thought and elements for comparison. It's a unique experience that allows marketing teams to take full ownership of the diagnosis and solutions.

### **Live semiological analysis**

Research institutes often carry out semiotic analyses in their offices and deliver the results to their clients in the form of finalized reports. Just as it is interesting for a client to attend group meetings, taking part in content analyses allows them to experience the research first-hand. We use the name *semio-live* for live semiotic analysis in the presence of the client.

The live semiotics approach combines several advantages:

- **interactive advantage** of direct answers to questions by broadening the analyst's perspective with questions he or she hadn't thought of
- **economic advantage**: an analysis can be organized quickly once the corpus is available, with immediate initial results and at a limited cost. Depending on requirements, the session can be followed by further analysis and a detailed report.
- **creative edge**: a creative, solution-oriented analysis.
- **pedagogical advantage**: taking part in the session by following the analysis process helps you to take ownership of the results.

### **The *screencast*, live deciphering**

The principle of analyzing a corpus by an expert and recording the session on video is part of the new panoply of digital Qual. This is the *screencast* technique, which combines digital video recording of the screen display and the microphone. It's also highly effective for cross-cultural analysis.

Clients appreciate being able to review these analysis sessions.

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We have seen the power of semiology in drawing lessons and uncovering the grammar of a brand or a universe. It's the best way to give meaning to a mass of qualitative data by including a historical and physiological perspective. The deliverable benefit from being illustrated with a repetition of the visuals analyzed. Live decoding is an agile and powerful solution to give meaning to qualitative data.

One form of analysis is developing with web listening, which can be translated as constant monitoring of the social web and forums. For a brand, this is known as reputation monitoring. The aim of this chapter is to understand when web listening analysis is fruitful.

## Chapter 6: Making the most of social listening

Let's look at some of the most interesting qualitative data to listen to and the processing that can be carried out.

To fully understand the potential of social listening, we interviewed around fifteen people, including experts working with software such as Qwam, Linkfluence, Talwalker, Synthesio, Synomia, Dynvibe, Netbase Quid, Semdee and Proxem.

### The benefits of artificial intelligence (AI)

Various software can be used to track, collect and analyze data from spontaneous expressions or responses to surveys. Sources include social networks, forums, transcripts of telephone conversations, user opinions, emails, internal surveys, public consultations, etc.

Videos are analyzed based on automatic transcriptions of their audio tracks, and photos are analyzed mainly based on the associated text. Some software, such as Linkfluence's Radarly, uses computer vision technologies to recognize logos in images and convert the images into usable information.

**Table 21 - Algorithm functions**

Counting / measuring	Ordering
Count the occurrences of a term, sentence or lexical field in relation to others. Weight the importance of certain categories in relation to others Measure the proximity between different terms (by transposing them into vectors)	In lexical fields: thanks to pre-existing synonym dictionaries (such as Thesaurus) or dictionaries created specifically for this purpose In emotional categories: (positive or negative) thanks to dictionaries that associate a word with a connotation In specific categories: either by keywords or phrases entered by the user (assisted analysis), or in categories identified by the software as recurring (non-assisted analysis)



In all these methods, the quality of the results obtained depends on:

- proper data cleaning
- in assisted analysis, a wise choice of key words to identify and record, to fully grasp the phenomenon being researched
- the integration of dictionaries to identify lexical fields or tools for reading sentiment

This method makes it possible to:

- automatically identify the most frequently expressed ideas in a text, in any language and in a limited amount of time;
- follow a theme over time, with the ability to zoom in on developments day by day, hour by hour;
- use the extracted data to find specific examples to look at in detail (for example, identify the most negative and detailed consumer reviews and read them);
- process an industrial quantity of information (thousands or even millions);
- almost instantaneous feedback of results, often in the form of graphs and digital dashboards;
- tangibly quantify results that are easier to understand and share than qualitative *insights* are.
- draw maps linking ideas according to their proximity (i.e. whether they are most often mentioned together or not) and visualize thematic clouds.
- systematic benchmarks: everything is always analyzed in relation to a temporal benchmark (changes over time) or a competitive benchmark.

## **The role of the social web and community platforms**

The term social listening refers to spontaneous data:

- in collective or exchange spaces such as social networks and forums;
- in individual spaces such as Instagram accounts, blogs, and spontaneous emails.

This use of existing data without the author having been prompted to produce it differs from induced data collection methods.

Social media (Facebook, Instagram, Pinterest, Twitter, YouTube) are omnipresent in people's minds as sources of data. Several professionals are warning of the limits of these platforms.

What's more, access to social media is becoming increasingly restricted. It's difficult to pull in content without a partnership with a social platform, or you have to pull in content by hand. Access to Instagram is patchy. You can identify posts using hashtags, but it's difficult otherwise.

In these analyses, there is the richness of spontaneity, but no plunge into intimacy, experience, perceptions, ways of seeing. The tools used to measure the performance of social media and influencers are primarily designed to guide investment in these media. They evaluate the audience, engagement (likes, shares, comments), identify the top influencers, and so on.

## The potential of consumer reviews

For Valérie Satre of the Seb Group, *social listening* is a good tool for clearing up a subject with unbeatable value for money. It allows us to understand who the players are in several countries, and what the motivations and obstacles are around a given theme. However, social listening cannot replace all research, especially when the advertiser knows its market well and is looking for specific insights.

To access the full results, scan the following QR code:



## Understanding brand targets and communities

Brands need to understand the culture of their target audience. They have communities of fans who identify with and perform for the brand. As the American marketing expert Seth Godin says in his book *Tribes*, community marketing is within the reach of brands that know how to motivate, interconnect, and listen to their members. Marketing and communities tend to go hand in hand. All you need to do is establish an ongoing relationship with the community to feed the brand's marketing through a continuous organic exchange.

## Tool

### ***Tribes from Linkfluence to identify communities***

Linkfluence's Tribes tool helps you identify and track your fans or certain social groups. Regular observation of these communities and user-generated content enables us to understand consumer micro-cultures, trends, recurring questions, styles, common behaviors, diversions, values, interests, etc.

These influencers are all the more important to follow as they shape the way brands are perceived and give an insight into what might attract future customers. By observing a minority of avant-garde influencers, the brand is at the forefront of the trends that will spread to its core target audience in the near future. In this age of co-creation with its community of consumers, it is essential to get closer to its target audience, but also to the micro-communities that embody the values that the brand is aiming for. With a tool like Tribes, it's all about getting close to your current or potential target audience. To understand young vegetarian women in their 20s and 30s, Tribes will identify in the bios and publications posted whether they are purists, sporty or more idealistic...

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Social listening makes it possible to identify and classify spontaneous consumer speech. Spontaneous expression by the public is all the more interesting because it is based on an experience and tells us about it in text or images.

Another solution for attracting a large number of responses is to include open-ended questions in surveys. This semi-open approach is suitable for certain surveys.

## Chapter 7: Opening up quantitative research

Quantitative research covers very different types of study. Let's see which ones lend themselves to open-ended questions before showing how to proceed.

Quantitative studies enjoy a good reputation for reliability. This is particularly true of behavioral measurement studies, which are highly accurate. Quantitative studies using questionnaires are much more uncertain. Some even go so far as to call them qualitative studies, given their relative reliability.

### Behavioral measurement and perception testing

There are two main types of quantitative research:

**Table 22 - Quant: two types of study**

<b>Measuring and observing behavior</b>	<b>Interview by individual survey</b>
Implementing tools to measure behavior or reality. A panel of interviewees will scan the barcodes of all their purchases. Analysis of purchases by loyalty card holders or TV consumption via a set-top box Measuring displacements in a space using a sensor	Questioning through language. Interviewees asked to situate themselves on various scales. Questions about advertising or the attractiveness of a concept.

### The reliability of passive measurements

The solidity of the data results from the objective method of collection: a measuring instrument captures the data and human intervention remains limited. In the case of consumer panels, you have to scan the barcode of the products you buy. The risks of error are linked to possible negligence on the part of the household or to the fact that certain products may escape the scanning process. For studies based on loyalty cards, there is a limited risk of omitting purchases that were not made using the card.

## The ethnological potential of behavioral measurement

Audiometric studies using passive electronic measurements generate data on viewer behavior on different devices. They make it possible to observe who will be loyal to a given show, who will systematically watch all the episodes, and what is watched live or on replay.

These exhaustive data collections have a very strong ethnological and qualitative dimension in that behavior can be tracked down to the second. The analysis has a qualitative dimension because it aims to explain listening behavior. By analyzing the viewing curve of a show to the second, we can analyze in great detail the strengths and weaknesses of a show by seeing what keeps the audience and what makes it drop out.

More generally, the sensors detect micro-emotions through physiological signs (expressions, temperature, heartbeat) using facial coding and the connected wristband. This makes it possible to identify areas of stress and magical moments in an experience. A company like Datakalab has made this its specialty, evaluating reactions to advertising and perceptions of commercial spaces.

## The fragility of perception tests

There are two types of studies based on individual questionnaires:

**Table 23 - Questions about behavior or perception**

<b>Behavioral declarations</b>	<b>Perception survey</b>
The interviewee declares having leafed through a particular magazine, subscribed to a particular channel, or listened to a particular radio station yesterday between 2pm and 2.15pm.	The interviewee places themselves on a scale and gives their opinion on subjects they know about.

There is another type of study, perception research, which is much riskier. There are several pitfalls in questioning an individual to find out whether a particular message gives a brand a very, fairly, or not at all innovative image:

1. It's as if we're collecting data to quantify it, whereas the question itself contributes to the production of the result. This is true if the interviewee has

never thought about the subject or if he or she has to respect a scale that is not his or her own.

2. It's as if we were talking to a rational, aware consumer who is capable of projecting his or her own future. The standardized interview method gathers the most immediately available surface opinions. They may be interesting, but they remain partial.
3. We superimpose on the same measurement scale feedback from people who have different frames of reference. As Bourdieu points out, some people measure in centimeters and others in kilometers.
4. In perception studies, equal weight is given to those who know the subject and those who discover it at the time of the survey, on the one man = one vote model.

The results of a perception study depend on the quality of the questions or the question-answer pair. The quality of the results is linked to the quality of the questioning process. If the survey is poorly designed, the results will be distorted, whatever the size of the sample. Increasing the number of respondents will not correct the initial error.

It is in perception surveys that the need to include open-ended questions becomes apparent. Because we need to understand the concrete reality of motivations and perceptions and put certain figures into perspective.

### **A more open interview format**

Many advertisers commission quantitative studies, with open-ended questions: concept tests, use tests, name tests, pack tests, communication pre- and post-tests, etc. The same applies to satisfaction measurement, where verbatim feedback is becoming just as valuable as the measurement of indicators such as NPS or *Customer Effort Score*.

### **Lighting up Quant**

Above all, opening the survey allows for better investigation and more detailed data collection. Jean Moscarola in his article entitled "*Language Acts. Investigation Methods and Analysis of Text Data*"<sup>14</sup> " shows that a highly structured question such

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<sup>14</sup> Jean Moscarola (1994) "Les actes de langage. Protocole d'enquêtes et analyse des données textuelles" Proceedings of the Consensus Ex-Machina conference, La Sorbonne.

as measuring satisfaction on a scale gives an impression of precision that is in part illusory. This type of systematic question (scales, items, etc.) requires the interviewee to situate him or herself within the interviewer's frame of reference. These questions appear to be objective when in fact they are subjective. To improve the reliability of interpretations and clarify quantitative results, one solution is to combine close-ended questions with open-ended questions.

## **The usefulness of open-ended questions**

During the field phase, questionnaires that are too mechanical and constructed with tunnels of close-ended questions lock interviewees in and put them in the position of a robot. They elicit mechanical and superficial responses.

To work well, the survey must, on the contrary, make the respondent want to be involved in their answers and to associate themselves with their experience. Alternating open and close-ended questions is an ideal compromise: the interview gives the respondent enough freedom to express themselves with a minimum of supervision.

Open-ended questions are also a very effective way of assessing respondents' involvement and weeding out the laxest respondents. Respondents with a low level of involvement are easily identified by the time they spend answering, the number of words they use and the content of their answers. They adopt a detached tone, give similar answers to several questions (e.g. *ditto*, *no opinion*, *DK*, *RAS*, etc.), skip questions and multiply vague answers. These neglected answers pollute online surveys: they must be avoided and, if necessary, eliminated. This can lead to 20% of a survey field being eliminated.

## **Progressive discovery and feedback**

In a context where Internet users are alone in front of the screen, it is crucial to stimulate and guide them. To develop semi-open questionnaires, it is useful to draw on the experience of semi-structured interviews with the aim of structuring them. This requires a survey format:

- alternating open and close-ended questions (up to 25 open-ended questions possible);
- in a funnel from the broadest to the most precise, following the interviewee's gradual entry into the subject;
- with spaces in the survey to encourage responses;
- avoiding leading the answer with overly directed questions or series of items.

In the field of pre-testing, a fairly open-ended survey can mimic the gradual discovery process. In the pre-test of a product, a name, a logo, an application, or a magazine, with a survey including around fifteen open-ended questions, we can gather the perceptions of interviewees who are gradually brought face to face with the object being tested. First, spontaneous first impressions are collected after rapid exposure; then the interviewee is invited to familiarize himself with the object being tested and is asked about the different dimensions of the product, with possible comparisons. At the end of the survey, the interviewee can assess his or her motivations and obstacles using open and close-ended questions, with, in the end, feedback on a series of items.

In the field of post-tests, the opening of the questions is an opportunity to gather the accumulated experience of consumers. The interviewee may first be asked about their initial motivations for buying the product, then about their overall perception of its use, before being asked to zoom in on a particular aspect of their experience. To stimulate memory, it may be useful to show some elements during the post-test.

### The format of *online* surveys

Most online surveys are designed as a series of screens, with a single question per screen or a small number of questions per screen. Questions are accessed one after the other, with no possibility of seeing the question that follows. It is interesting to consider the merits of this practice.

There are two ways in which surveys work:

- sequential mode, with one question per page, without revealing the questions that follow;
- panoramic mode, where the entire survey is displayed (or at least not hidden).

**Table 24 - Sequential / panoramic: two interrogation contexts**

	Sequential mode	Panoramic mode
Query channel	Telephone or face-to-face	Self-administered paper
Vision of the survey	No overall vision	The big picture
Context	Each answer is isolated from its context	Context interferes with every response



## Section 1.29 Sequential versus Panoramic

Table 25 - *Online survey: two survey formats*

Sequential format	Panoramic format
One question at a time	Overview of the survey
Focus on one issue	Involvement and a considered stance
Aims to study the answers to each question independently of the context.	The aim is to create a rich dialogue with Internet users, who hold all the cards in their hands to express themselves.
Exploits certain media capabilities (calculations, sorting, filters, tags, etc.)	Well-suited to the logic of the medium (a single glance, reappropriation) and to respondents' desire for an overall vision
Risk of mechanical response and compulsive clicking	Risk of environmental pollution

Online surveys therefore offer a choice between several approaches and combine the advantages of previously distinct modes of questioning. The online survey can combine the two approaches in a single survey, which is partly sequential and partly panoramic. This makes it possible to start with filter questions and continue in panoramic mode.

### Open-ended questions to ask

Researchers have often limited the use of open-ended questions to three main purposes: clarification of the "other" response, reasons for dissatisfaction, and suggestions for improvement at the end of the survey.

However, open-ended questions are also very effective on issues such as:

## Method

### ***Examples of open questions***

Open questions can be used in many ways. Here is a classified, non-exhaustive overview of questions asked in surveys.

**Memories:** Tell us about a luxury brand communication that made a particular impression on you. Tell us what initially led you to consume soya foods. Describe your experience of a musical show that made an impression on you.

**Spontaneous awareness:** Tell us about the occasions and types of jam costing more than €4 that you sometimes buy. Which brands of outdoor sportswear do you know, even if only by name?

**Evocation field:** What does the name Livebox evoke for you? What qualities do you expect from jam?

**Selection criteria:** What do you think is particularly important when choosing flowers? What are your criteria for choosing a brand of non-prescription cough syrup?

**Explanation of closed questions:** How does this product make you want to buy? Explain what particularly attracts you about the Champagne cases you have selected?

**Feedback:** Describe your favourite car-sharing meeting place and explain why you particularly like it. Tell us about your last cut flower purchase (type of shop, type of flowers chosen, occasion, etc.). Tell us about one or more problems you've had with your car-sharing appointment, and what you've learnt from them. Describe what you use to improve indoor air quality. Give examples of situations where you prefer to use your old glasses rather than your new ones.

**Comparisons:** What motivates you to buy Champagne in hyper/supermarkets compared with other distribution channels? What are you sensitive to in terms of outdoor air? What are you sensitive to in terms of indoor air? In your opinion, what distinguishes Alsace white wines from other white wines?

**Progressive focus:** Describe the impact that washing up can have on the way you eat. Describe the difficulties you have in defining the taste of Alsace wines.

**Stimulus test:** Indicate below the arguments and/or features of the device that most caught your attention, and explain why.

**Spontaneous indicators:** What is your ideal living space, in m<sup>2</sup>? In your opinion, what is the ideal size of a living room, in m<sup>2</sup>?

**Suggestions:** What types of Champagne promotions/events (beyond price reductions) would you like to see in shop? What could make the Champagne section in hyper/supermarkets more attractive to make you want to go there?

**Summary:** What do you think makes a pop-up store attractive to a brand?

There is no ideal open-ended question. Work carried out by consultant-researcher Patrick Mathieu in 2021 has shown the different ways of asking a question depending on a singularity profile<sup>15</sup>. It is the mass of answers, with the different ways of understanding the question, that will make the result richer.

Another solution for opening questionnaires is to combine a quantitative phase with a qualitative phase. By collecting contact details during the quantitative phase online, it is possible to recontact certain respondents. This phase is facilitated by the power of digital re-interrogation.

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Open-ended questions are very useful for motivating respondents and explaining their answers. They stimulate the respondent's participation, reflection, and creativity. They follow the funnel-shaped progression of the survey, inspired by the semi-structured interview. To obtain rich responses, you need to alternate between close-ended and open-ended questions, and favor panoramic formats that give a complete picture. Digital technology makes it easier to answer open-ended questions, as it is the respondent who types the answer. Responding to open-ended questions will be even more natural with audio responses combined with speech-to-text.

The challenge is to exploit this material in an effective and relevant way by combining software and human intelligence.

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<sup>15</sup> <https://patrickmathieu.net/fr/singularites>

## Chapter 8: Analyzing open-ended questions and textual data

Integrating open-ended questions into quantitative research involves processing the responses. This involves various analysis techniques.

### Content analysis of open-ended questions

The best way to deal with open-ended questions is to combine two levels of reading:

- a qualitative level of in-depth understanding of the interviewees' main perceptions;
- a quantitative level of reading by counting and coding to process the responses statistically.

The aim of content analysis is to identify units of meaning, to explain the material collected with the rigor and fruitfulness of objectivity. We need to be able to generalize and take advantage of the finesse of the testimonials. With large-scale qualitative research, the mass of responses can be used to highlight typologies of attitudes or behavior.

In practice, it is quite appropriate to entrust this work to a qualitative or mixed research manager. In-depth analysis of open-ended questions is part of a qualitative culture and corresponds to a content analysis approach. The number of verbatim comments makes it possible to prioritize the weight of reactions. These are often accounts of experiences that can be modelled. To assess the potential of a concept, one solution is to classify all the reactions and assess the most critical. This is a sociocratic approach in which the interests of all members are considered. The aim of a consultation is to see if there are any admissible objections and to deal with them.

To analyze open-ended questions, there are a few simple steps to take:

- sort the verbatim according to the preceding closed question in order to isolate those who appreciate the concept using the spreadsheet;
- sort verbatims in Excel according to a code plan to facilitate grouping;
- give the verbatims a different color depending on the target audience;
- put the answers in alphabetical order: this classification brings together sentences that start in the same way and is a more interesting way of sorting than taking the verbatims in order of arrival.

In addition to manual or semi-assisted processing, it is interesting to consider systematic processing tools.

## Automated processing

For the systematic processing of open-ended questions, two tools are immediately obvious:

- **lexicographical analysis and semantic analysis**: analysis of language by reduction to a lexicon;
- **coding**: classifying and counting the themes and ideas expressed.

Lexical processing enables us to extract a lexicon of the most frequently used meaningful words and to analyze the language used. While lexical analysis enables us to study language (enunciation), coding enables us to analyze the content of responses (the statement).

These methods initiate and complement qualitative analysis. They make it possible to extract key ideas from a text, without truncating it, as it is possible to click on each identified theme to go back to the key verbatims. This provides a first level of reading of the results, allowing you to dig deeper into certain elements if necessary.

### **Section 1.30**      **Computer-assisted coding**

Starting with a range of rich and nuanced responses, the aim of coding is to draw statistical indications from all the verbatims. To be effective, coding must avoid two pitfalls:

- a breakdown of the answers to open-ended questions that distorts the results
- too much loss between the field and the processed result

The analysis of open-ended questions must make the most of the wealth of information expressed. To do this, computer-assisted coding software, which assigns thematic fields to the verbatims, enables statistical measurement while preserving the content of the responses.

Asking an open-ended question to a large sample enables us to gather a wide range of perceptions expressed by interviewees with very diverse cultures, experiences, and positions. What is particularly convincing about this approach is the extent to which the spontaneous perceptions of individuals, questioned independently, spontaneously converge. The new players in the polling industry, such as Happydemics, Qualintra, Mopinion, Potloc and Episto, are not very keen on developing open-ended questions. They are more focused on the ergonomics of questionnaires or recruitment techniques than on the free expression of interviewees. These players are presenting themselves as an alternative to traditional research institutes: they are revolutionizing research and promising to do away with old-fashioned panel systems, boring surveys, and unreadable research reports! In all seriousness, let's look at what they have to offer.

## New generations of research

What is changing with these start-ups is the automation of the process. Opinion is gathered via advertising banners placed on networks. The service is sold on a subscription basis, where both the software and the guaranteed respondents are purchased. What is automated is the creation of the survey, its distribution, and the processing of the results.

In terms of sampling and targeting, they emphasize the diversity of recruitment by using the largest panel in the world, with, according to Happydemics, "instant access to billions of individuals who are constantly renewed and unpaid, a source of freshness and spontaneity", which they compare to "files of thousands of individuals recruited and pre-qualified on certain attributes to regularly answer questionnaires in return for an incentive". For the recruitment of niche targets, these start-ups supplement their systems with personalized contacts. They can send geo-localized profiles, so they can question profiles that have been exposed to a local event.

As far as the format of the questionnaires is concerned, they are conversational modules that resemble chatbots, with the aim, according to Potloc, of "*creating surveys that make people want to respond*". It's true that the ergonomics are excellent for short questionnaires on smartphones. These new players excel at capturing behavior on the fly by asking questions at a precise moment in the digital journey, to obtain an answer *in situ* and by recovering all the data from the context of the query.

The questions are in the form of question banks and include the new indicators: *Net Promoter Score*, *Customer Effort Score*, *CSAT*, *Goal Completion Rate*. Open-ended questions are used sparingly, and qualitative responses are few and far between.

These start-ups place a great deal of emphasis on their interactive platforms dedicated to the visualization and processing of intelligible data. They are also able to generate comparisons (between brands, product categories and countries, for example) and obtain results in record time.

I wish these new-generation pollsters all the success, but I would encourage them to integrate the qualitative dimension as much as possible.

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Analysis of open-ended questions is based on content analysis techniques. Open-ended question processing software group responses into a few dozen quantifiable concepts. They make it easier to navigate through the verbatims.

The sinews of war in qualitative research lie at the analysis stage. This is where the material collected is refined. To understand this material, creative intelligence and general knowledge are essential.

## Chapter 9: Producing powerful qualitative analyses

A good qualitative analysis aims for an understanding that is both in-depth and large-scale, micro and macro. The analysis is all the more powerful if it succeeds in covering all the dimensions of an experience or phenomenon at 360°. The added value comes from a cultural and creative approach supported by experts.

### Deciphering complexity

Marketing research comes up against the complexity of motivations, the intertwining of causes and the multiplicity of explanatory factors. We need to understand the coherence of the whole and the parts that make it up.

To succeed in deciphering complex phenomena such as the analysis of an experience in all its different facets, we need a powerful methodology that can be applied over time and that allows for several iterations. You need to be able to follow the consumer's habits and relationship with brands day after day, and to multiply the lines of questioning as the study progresses. We need to avoid segmenting the subjects too early on and offer the opportunity of a bird's-eye view of the field to be studied, with the possibility of going back and forth on specific points at will.



## Method

### ***Anthropologist Dominique Desjeux's scales of observation***

It makes sense to look at the discrepancies between practices and representations, and to consider material constraints (price, time, space, objects), social constraints (norms, learning, power relationships) and symbolic constraints (personal and professional identity). Innovation means freeing consumers from one or more constraints. Dominique Desjeux recommends looking at reality from different angles and changing the scale of observation. He distinguishes between the following scales:

- macro-social values;
- meso-social organizations;
- of interacting social actors;
- and the neurobiology of the brain.

It is because reality changes as it changes scale that we need to be mobile, with methodologies adapted to each breakdown. The macro scale is that of the major collective values and social cleavages found in quantitative surveys: class, gender, generation and ethnic, political or religious cultures.

### **360° view of reality**

Clients' requests for 360° studies can be divided into two types: brand-focused studies and consumer-focused studies.

- 360° brand-focused studies: all its manifestations, its territory, its coherence, the relevance of messages, etc. are studied. Client requests may cover the mix (name, product, pack, label, mentions), the product range, the product history and communication on the various channels, the point of sale and the competitive universe.
- 360° consumer-focused studies<sup>16</sup>: they start from his desires, his needs, his environment, his way of functioning, his entourage, and his habits. Contexts as diverse as the buying process (before/during/after), the search for information, exposure to the brand and its competitors, usage (before use/during use/after use), the reception of advertising messages from the

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<sup>16</sup> <https://testconso.typepad.com/marketingetudes/2008/02/irep-2008-lappo.html>

various channels, and the type of experience provided by the various touchpoints must all be considered.

Both 360° approaches take time. To anchor the testimonial in experience, we need to work on concrete contexts and put participants in situations through assignments (visiting sales outlets, exploring websites, tastings). It is useful to consider the people around you. During a long-term study, it is possible to involve other members of the household and to consider friends and professional contacts. Each individual is exposed to word of mouth and surrounded by users or prescribers. Longitudinal studies can take these influences into account.

## **Detecting *insights***

*Insight*, often confused with positioning, refers to the flash of understanding. *Insight* comes from *Gestalt* theory. It's the *Aha-Erlebniss*, the flash of genius, the *Eureka Effect*, where the subject starts to see things differently. A monkey with a stool is in a room, facing a banana hanging from the ceiling that he can't reach. *Insight* is the jubilant moment when the monkey realizes that it must place the stool under the banana and reconfigures the space to grab the banana. This leads to *Einsicht*, translated into English as *Insight*, which means revelation. *Insight* is the moment when, after an unconscious process, the subject has a new perception of the object under consideration.

One of the functions of research is to identify *insights*, sources of clarity and untapped innovation. *Insight* is the brand's innovative concept. It acts as the guiding thread for the brand's strategic actions and conditions the brand's mission. Detecting *insights* requires an approach that is both wide-ranging, to detect the challenges facing a market, and very detailed. Understanding the customer experience in detail is an inexhaustible reservoir of differentiating *insights* for a brand.

## **Mobilizing experts and available research**

In-depth understanding is also achieved thanks to experts with an interdisciplinary approach. Experts come in all shapes and sizes: academics but also people working in the field, media managers and sector specialists. For topics on alcohol, it is interesting to interview an anthropologist or a semiologist, but also a wine merchant, an oenologist, a barman, a marketing director in the spirits sector, a journalist specializing in the world of nightlife, a *trend-setter*. Experts are important for understanding what's at stake for consumers. You need to be able to see the big picture. They can take a practical or theoretical approach or have a feel for trends.

Among the experts who can be mobilized by the institutes are bicultural experts who understand the specific characteristics of a country or geographical area. These bilingual profiles have a good general culture because they have lived in different countries: they provide an insight into the specific characteristics of one country compared to another. Their dual culture is invaluable for taking an informed view and making a creative contribution.

### Case Study

#### ***Health and food in different cultures***

For example, to shed light on the translation of a food group's corporate signature, we were asked about the relationship between well-being and food in regions such as China, Indonesia, India, Russia and the Arab countries. Based on working sessions lasting 3 to 4 hours with two bi-cultural experts per zone, we were able to analyze the semantic field of health and food in Russian, Arabic, Hindi, Mandarin and Indonesian to establish clear definitions and distinctions between the different terms (food, nourishment, nutrition, etc.) and overlaps between the languages.

### **Favoring a cultural approach over a bureaucratic one**

A cultural approach places the objects analyzed in their historical, social, competitive, and other contexts. The essence of culture is that it is a multi-dimensional and evolving field that cannot be divided into watertight slices.

The lack of originality and innovation in many research results is due to the overuse of so-called '*bureaucratic*' research methods. According to Douglas Holt, '*brand bureaucracy*' consists in favoring standardized analysis and presentation tools to simplify and schematize reality in a reductive way, and favoring Cartesian or even pseudo-scientific approaches that leave little or no room for irrational arguments, emotions, and the human element. *Brand bureaucracy* encourages us to analyze market trends superficially, as if the consumer were living in an eternal present. To borrow an expression from the sociologist Max Weber, *brand bureaucracy* is a "steel cage" in which many companies have locked themselves, making them incapable of any real cultural innovation that requires a nuanced understanding of society and culture.

This involves deciphering the stories, images and associations immediately associated with the brand in popular culture. It also involves exploring the tangible

and intangible components of the brand to identify what may be the basis of a culture, the cultural universes that are not always made explicit, yet which are growth drivers, avenues for innovation, new cultural precipitates, in the same way that we talk about chemical precipitates. By shedding light on the object, the analysis provides access to a previously invisible truth, revealing a mode of operation that is not necessarily explicit, weak but fundamental signals. This requires an interdisciplinary, hermeneutic approach on the part of the analyst.

## **Understanding brand performance**

"Who am I?": to answer this question and gain social recognition, individuals need to be aware of the models to which they subscribe. This choice then takes the form of a claim, including in terms of consumption. To prefer one brand to another is to experience, consciously or unconsciously, the brand as a cultural model.

As a symbolic resource, brands are part of an identity in action and a form of self-invention: consumption is a playground for the expression of individuality. In the same way as gender, age, nationality and even religious affiliation, adherence to a brand can become a model of identity. This is the concept of performativity developed in the book *Brand culture* published by Dunod in 2019. Consumers perform brands: they wear the brand's colors, identify with its muse, adhere to its philosophy, become its ambassadors, reinvent their own uses, etc. To cultivate their performativity, brands must see themselves as cultural agents, through a universe rich in symbols, associated practices and identification media.

## **Capturing the physiological, sensory, and technical dimensions**

Companies and brands don't just exist through their words and messages; they represent a much more complex reality in the lives of consumers. In addition to discourse, culture implies a relationship with the body: gestures, sensations, handling of the objects that surround us. This physiological dimension and the role of technical media need to be considered in research. In an interview with Raphaël Lellouche as part of the writing of the book *Brand culture*<sup>17</sup>, we discussed the importance of considering the relationship with the body and with machines connected directly to the body. This invites us to relativize the brand as an imaginary construct and a system of signs, and to give more space to sensory, bodily, cognitive, and physiological realities.

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<sup>17</sup> <https://www.linkedin.com/feed/update/urn:li:activity:6823556792019156992/>

## Case Study

### ***The sensory dimension of Harley-Davidson***

For a brand like Harley-Davidson, the experience goes beyond the rationality of the technical discourse on motorbikes. This culture is also made up of clothing - leather jackets in particular, long hair, a certain type of body posture, the sensations provided by riding, a relationship with the machine, a special relationship with the girls on the bike, a special relationship with time and death, etc. The culture of a brand is made up of images, icons, materials, objects, sounds and symbols. A brand's culture is shaped by images, icons, materials, objects and sounds (the sound of the Harley).

### **Going beyond pure rationality**

Rational discourse and conceptual rigor remain necessary, but not sufficient, elements of analysis. The fact is that human beings do not live by concepts, discourse, ideas, demonstrative reason, proofs, and syllogisms alone: we also live and perceive with our physical bodies, emotions, memories, and experiences.

## A bit of theory

### ***Kahneman's systems of thought***

Daniel Kahneman, psychologist and father of behaviorist economics, distinguishes between two decision-making systems in his book "The 2 speeds of thought":

- System 1, which is permanently connected to our senses, operates automatically, intuitively assessing the environment, with rules of approximation and associations that enable it to make very rapid decisions over which we have little conscious control.
- System 2, which is mobilised on a more occasional basis, requires effort, deals with complex operations, calculates and formalises the judgement in a dialogue with system 1 (which tends to jump to conclusions). After deliberation, it then verbalises the result.

At the same time, brands do not exist solely on the basis of ideas and concepts, but are expressed through a complex sequence of signs belonging to different registers: coded elements that respond to all types of semiotic codes; non-coded elements that are difficult to characterize, such as atmosphere... so many disparate manifestations that enable them to speak, in humans, to the cognitive as well as the emotional and the physiological, with sensory, symbolic, social and other benefits.

One of the fundamental concepts of modern epistemology is that of the evolution and revisability of scientific theory: as opposed to religious dogma, which is revealed and unfalsifiable, scientific theory adapts to reality and evolves in line with discoveries, authorizing revolutions (such as the transition from Newton's physics to Einstein's, for example).

## **Developing creative intelligence**

Creative intelligence is an inventive approach that encourages the creation of original and relevant solutions. It considers a wide range of knowledge, integrating the senses and experience, calling on intuition and imagination, seeking surprise, and allowing open, multiple, and evolving responses. By shifting our perspective and looking for weak signals, we become more creative and increase our capacity to innovate. According to Dominique Desjeux, the more consumers have reinterpreted a product or service, the more likely it is to succeed. You must be on the lookout for these diversions and reappropriations.

Creative intelligence allows us to shape solutions at the same time:

- original and even unexpected;
- while being effective and relevant, making sense and meeting the constraints set.

Research is not only a decision-making tool, it also stimulates creativity. In an increasingly complex and changing competitive environment, the long-term survival of companies depends on their ability to innovate. They need to create magical moments, peaks of positive experience, which are major levers in the customer experience. In *The Power of Moments*, American researchers Chip and Dan Heath explain how to create emotional peaks and memorable moments by playing on surprise and stimulating curiosity.

Research is a source of inspiration, helping customers to open the field of possibilities by awakening them to realities previously ignored. As a result, brands are better able to identify trends and new opportunities (areas of investigation, modes of communication and consumer relations, etc.) that are innovative yet consistent with their culture. At QualiQuanti, we have been pioneers in areas such as brand content, brand culture, *gender marketing*, *care*, and product content.

## Uncovering trends

Here are just a few of the areas of research that have kept us busy in recent months and that can be applied to a wide range of subjects: the health problems caused by overexposure to screens, the nuisances associated with the use of smartphones in cultural venues (museums, concerts, cinemas), the lighting of venues and, more generally, the notion of atmosphere, immersive settings, digital screens and their creative and poetic potential, aesthetic rules for public spaces, forms of light and noise pollution, well-being as a pillar of CSR, the rush for air and the importance of the outdoors for social activities, the potential of QR codes, editorial innovations created for the smartphone, bulk and brands...

One of the major cultural trends is the widespread use of smartphones, which has transformed our relationship with time, space, and attention. Continuous access to information and constant contact mean that we live in an anxious rush to fill our time as fully as possible. The advent of virtual space has brought with it the phenomenon of spatial amphibia, meaning that we live both in real physical space and in virtual space, including in telephone conversations. There is also a new system of visibility, the attention economy. Brands with mass attention can do whatever they like. These brands thrive on the targets they capture. Constantly solicited by this new economy of attention, individuals are sleeping less and less. According to Jonathan Crary, an American essayist, we are all good little soldiers, brought to heel by a global capitalism that has colonized almost everything in its path, thanks to the power of its 24/7 tempo.

## Developing intercultural analysis skills

The globalization of brands poses the problem of adapting the brand to local markets. But in most cases, internationalization involves transposing the original model to foreign countries. This strategy of duplication, literal translation of slogans and transposition of values is a potential pitfall. Each country has its own consumption patterns, its own value system, its own ideals that need to be understood. Cheese is eaten before dessert in France, at breakfast in Germany, as a starter in Portugal. To understand these intercultural realities, we need to mobilize multicultural teams and build up expertise in each country. Documentary intelligence, *online* questioning tools and international panels give us the power to conduct research on a global scale. It's up to the institutes to take intercultural differences into account with finesse.



## Case Study

### ***Linguistic analysis applied to hair straightening***

During a study in France and England on the communication of a hair straightening product, we called on Charlotte Ribeyrol, a graduate of the Ecole Normale Supérieure and lecturer in English literature at Sorbonne University, to shed light on the differences between the French and English versions of the sales pitch. In particular, she lent her expertise to the translation of "*tamed, frizz-free hair for a long time*" as "*cheveux souples, dociles pour longtemps*". For Charlotte Ribeyrol, the word "*frizz*" in French is less well understood than in England, where it is the accepted term for "little curls". "Frizzy", which refers to having small curls, falls between the words "*curly*" and "*wavy*". The term does not imply hair that is difficult to manage, and has positive connotations because it evokes a cute side.

The word "docile" has sexist, misogynistic connotations, in that it applies to women; whereas in English, the word "*tame*" is less confusing because it is associated solely with animals. On the contrary, the metaphor is enhanced: the word "*tame*" evokes the idea that women have a mane that needs taming.

The translation of "*anti-frizz*" has given rise to two expressions: "*frizz-free*" and "*anti-frizz*":

- "*Frizz-free*" connotes the idea of liberation, absent from the Latin prefix "anti". The two monosyllabic terms, with their "fr" alliteration, sound like a shock formula.
- "Anti" has negative connotations. It is often associated with political terms such as *anti-liberalization* or *anti-abortion* and suggests the idea of violent opposition. It even connotes the idea of destruction, as in *antibiotic*. Coupled with the name of the product, it could introduce the idea of a service that harms the hair, of an aggressive product.

Qualitative analysis is a subtle art that must accept its share of subjectivity to overcome it. It must be able to multiply angles of view and tame complexity.

The analysis of results in the production of a deliverable must reflect as much as possible the truth of the situation and the added value of the analyst.



## Chapter 10: Distributing living, inspiring results

In the space of 30 years, technology has enabled us to move away from 100% typed research reports, presented on overhead transparencies, to visual aids incorporating photos, sound, and video. Beyond the deliverable, we need to anticipate the appropriation of the results and the transformation of the analysis into an action plan.

Several research clients interviewed during the preparation of this book regretted the lack of development in the deliverables and expected more impact and modernity. The presence of massive qualitative data poses major challenges for the delivery of research results:

- transmitting lively, stimulating material: recording reality with photos and video
- make the vast amount of information collected (verbatims, photos, examples, studies) easy to digest.
- make the deliverables easily accessible to customers: storytelling, recordings and workshops can all contribute to this.

### The importance of image

Images have become vital at every stage of a marketing study. They are useful at the document monitoring stage, but also for reporting on the field during feedback.

When interviewing individuals in a situation, it is useful to film or photograph to capture the richness of the experience. Filming provides access to material, cultural and symbolic culture well beyond the verbal. In addition, photography is an asset for capturing the meaning of situations. Web conferencing software can be used to transform any slideshow into a video, as well as to manage end-to-end video extracts without the need for editing software. Video captures within PPTs are also very easy to handle.

A video report changes the client's perceptions more than any textual explanation. The image conveys the various elements of the analysis more clearly and intelligibly than text or graphs. During a month-long test of mustard in a tube with 300 consumers, we collected almost 400 photos illustrating the different uses of the product at different stages of maturation. The client's R&D department took a close look at these photographs. For tableware, we collected several hundred of photos of the different meal situations produced by around twenty households over the long term. Putting these photos into perspective helped us to make sense of them. We were able to see how, in concrete terms, the tableware had an influence on the way people set up their plates and sit down to eat.

## Working documents and study reports

To limit the loss of information between the various phases of the fieldwork and the final report, one solution is to produce various working documents that contribute to the final analysis: forum scripts, preparatory documentary research, recordings of analysis sessions, etc.

These working documents provide a record of the research. They can be passed on throughout the study. They bring transparency to the analysis process and avoid the black-box approach often criticized by research institutes.

## Optimized reading experience

In terms of quality, the deliverables are uneven, sometimes with not very attractive media. A very French flaw, which comes from university and preparatory classes, is that professionals write long sentences in an unnecessarily complicated style. This is harmful when you know that it is preferable to communicate in short sentences (12 to 13 words on average). Journalists recommend an essential message in the first part of the sentence.

## What makes a good deliverable?

For optimal reading of editorial content, Cyrille Franck, Director of ESJ Pro, recommends 3 rules: readability (airy text, short paragraphs), progressiveness (information presented in order of importance, progressively) and accessibility (vocabulary adapted to the target audience). According to Cyrille Franck, information architecture needs to be adapted to readers: eye-catching (from the first few seconds, fast pace, fewer words for more meaning) and intuitive (logical presentation of information).

**Table 11 Deliverables: what qualities?**

	<b>The qualities of a good deliverable</b>
Landmarks	Plan, summary, methodology
Aesthetics	Structure and rigor, sobriety, typographic unity, 16X9 format, involvement of an art director, bank of pictograms, creation of a mask, etc.
User experience	Physiological legibility, guidance, meaningful titles, landmarks, fluid reading paths

Attractiveness	Catchy, rhythmic, emotional, alternating between dense text and more visual sections
Editorial	Information presented in order of importance, short sentences, meaningful headlines, multi-speed deliverables
Vocabulary	Short, concrete, precise words that convey information Speaking to the heart, to emotions, to experience Use the present tense and action verbs Avoid jargon, neologisms, technical or learned words, acronyms, abbreviations, and words with multiple meanings.
Illustrations	Photos illustrating the subject, plans, diagrams, tables, video integration

## The framework for deliverables at QualiQuanti

We have defined a charter<sup>18</sup> based on journalistic techniques:



- an informative title and an explanatory caption. The slide hierarchies the information: the title gives the result; the sub-title explains it and the rest of the slide illustrates it. Quick reading is made easier;
- The report can be read at several levels, quickly or in depth. The report can be understood simply by reading the headings that follow. The rest of the analysis allows you to delve deeper into specific points;
- visuals that make sense. We give priority to realistic illustrations: photos from monitoring or consumers, captioned visuals of products, graphs and diagrams, etc.;
- effective transmission of information using journalistic techniques. Each slide focuses on a key result and gets straight to the point. The analysis remains concise, using precise, concrete words.
- the key results highlighted. Illustrations and color codes explain the elements presented. Key data and analysis are immediately apparent.

These principles make it easy for everyone to read and take ownership of our deliverables. It is also a framework that facilitates the writing process.

<sup>18</sup> <https://www.qualiquanti.com/wp-content/uploads/2021/05/A-quoi-ressemblent-nos-livrables.pdf>

## Making a large quantity of results digestible

One way of communicating the results is to break them down into key findings and pass them on gradually. The research departments of large companies have observed that the document presented is not read, but a feeling of lack of information remains. The only solution is to "chew up" the work, to evangelize around strategic and forward-looking subjects. To facilitate the appropriation of information, Ipsos' *Insight Cloud*<sup>19</sup> is a platform for creating, sharing, and enriching *insights*, the aim of which is to socialize intelligence and encourage the flow of ideas.

Martine Ghnassia of InCapsule by IFOP suggests delivering the results in the form of a series with different episodes to keep clients' attention throughout the innovation research process, which is often long and made up of successive parts. Many institutes offer tools for disseminating results via infographics, mini-sites, newsletters, applications, booklets, blogs, databases, illustrations produced by a graphic facilitator, videos, compilations of interviews or ethno-reports, *motion design* films, training software, etc.

## Synthetic qualitative indicators

Quantitative research can aggregate results into a few key figures that can be tracked over time. Just look at the success of indicators such as the NPS (*Net Promoter Score*), which summarizes the evaluation of the customer experience by counting satisfied customers (promoters) and subtracting dissatisfied customers (detractors). It's easier to evaluate office lighting in terms of energy consumption than in terms of the well-being of the occupants. Yet lighting has a major impact on well-being and productivity. But well-being is more difficult to quantify because it is a relative and subjective notion. There is a place for us to conquer by developing qualitative or sensitive KPIs (*Key Performance Indicators*). The Repères institute had the good idea of creating R3m score, an indicator based on a single open question: "*What are the 3 words that come spontaneously to mind?*" This indicator assesses reactions to an experience or stimuli (product, brand, trend), either on the spot or from memory.

One solution is to combine quantitative scores with a qualitative approach. To assess the effectiveness of product sheets, we have created a perception indicator based on three criteria (readability, editorial richness, aesthetics). Each figure is explained by a qualitative summary. There are many ways of reporting qualitative feedback, including word clouds and concept trees. To summarize the brand culture compass, we group the main dimensions of the brand in a north-south-east-west diagram with twelve dials. Patrick Mathieu's singularity tool enables us to situate the players in his

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<sup>19</sup><https://www.insight-cloud.com>

world around 3 main profiles (sovereign, warrior, producer) and 6 sub-profiles (sovereign magician, sovereign lawyer, etc.). He is working on modelling singularity in 6 stages.

### **Data visualization and interactivity**

Numerous tools have been developed to facilitate the display and communication of results. DATAVIV, developed by Le Sphinx, stands out by incorporating textual and semantic analysis functions combined with statistical tools. This makes it possible to automatically generate:

- **Graphs:** histograms, stackable bars, curves, stackable areas, sectors, half-sectors, ring, half-ring, moustache box, pyramid, indicator, bars, facing columns
- **Visualizations:** word cloud, gauge, heat map, compass rose, bubble matrix and point/bubble cloud, fillable images, proportional map (*Treemap*), geographical maps.
- **Computer graphics:** creation of graphic shapes, insertion of custom images, vector image bank, insertion of pictograms, addition of rich text zones, management of graphic object rotation, automatic alignment function

It is possible to stage their appearance in a scenario or according to the actions of the reader:

- **Scenarios:** filtering a view, illustrating analyses with a view, filtering results from a table/graph, conditional display of objects, hover comments
- **Responsive display:** multilingual management, real-time results updates, construction of dedicated websites with links to results

### **From live presentation to replay**

Presenting a study is one of the compulsory parts of the job. You draw up a list of participants, cross-check agendas, look for a venue and book a time slot. Sometimes several presentations are required. Like any live event, it has its advantages (creation of a shared vision at a given moment) but also its disadvantages, with the need to mobilize many people in synchronous mode. It has to be said that the time for discussion during or after the presentation is often a little short.

**Table 27 - Study presentation: live or replay?**

	<b>Live presentation</b>	<b>Recording replay</b>
Principle	Live study presentation, in person or remotely, with question-and-answer session	Recording either during the live presentation or during a dedicated session
Recording	The advantages (direct contact) and risks of live: technical problems, room unavailable, faulty sound, participant delays, last-minute cancellations, missing speakers, risk of content slippage, etc.	It is possible to record in several parts, to split the presentation and reserve access to certain parts (e.g. summary and recommendations for managers), to control or even modify the content and to control the duration
Reuse	All you have to do is record the live show to get a replay	An archive presentation is available on request
Interaction	Live during and after the meeting if time permits (time for questions is often cut short by the presentation)	Possibility of organizing a meeting dedicated to discussions after individual viewing. Questions can be asked in advance
Constraints	The meeting must be organized at a fixed time; risk of having to wait for latecomers	Freedom to watch whenever you want: at speed, by skipping passages or in instalments
Flexibility	Only by choosing your arrival and departure times	Can be recorded in several languages and split into several modules. No time zone problems
Follow-up	Pointing out those present, eye assessment of reactions	Find out who's been watching and what passages they've seen

Recording presentations in replay mode has come in handy on several occasions:

- to record a presentation at the time the study was carried out, knowing that the oral presentation would take place several months later;
- For a 2.5 hour presentation with numerous examples to decipher, we produced several separate modules with the option of watching them in fast-forward mode, and organized a discussion meeting after the client had viewed the material;
- for a subscription study to propose a fixed support and associated presentation;

- to present the same study in English and French.
- for a client who wanted to integrate the summary of a 10-minute presentation to the board of directors without involving the institute;
- for a client who wanted to be able to separate the results of a study of two group companies so that each company could attend only the part that concerned it.

## Live analysis production

In addition to the presentation of studies, there are other situations where recording works: expert decoding. Recording a piece of analysis with the image of what is being analyzed and the voice of the analyst in the background is highly effective. The process transforms the analysis into a deliverable. You can follow the progression of thought within a rich corpus. The reader can move through the analysis from image to image, with sound/image indexing.

## Strategic planning

Born in advertising agencies, the role of strategic planning is to understand the brand and the consumer to guide strategy and creative execution. When it first appeared, strategic planning was seen as a bridge between the sales function and creative people. In fact, the planner is a cultured person who reads research and is familiar with needs and trends. They dare to take a step to the side to find the *insight* that will change things. They can therefore play a strategic role in relation to the brand. They also act as an interface with the creative team, conveying the consumer's vision and suggesting creative options. The profession of strategic planner has developed in the media, advertisers, and research institutes.

According to Nicolas Riou, CEO of Brain Value, strategic planning makes research results easier to act on and fosters partnership with the customer. It allows us to co-create the marketing strategies that flow from the research. Planning works to make the results more actionable for marketing decisions.

Planning is used upstream of the study, with benchmarking and trend research to enrich our understanding of the problem. This is what we call documentary exploration in this book.

## Digital workshops

To maximize the impact and implementation of studies, the principle of appropriation or activation workshops is becoming widespread. The workshop is a way of optimizing the sharing of the study, developing it, building it, and bringing it to life internally, as well as adopting a more collaborative approach to reporting.



### Expert opinion

#### ***The workshop by Céline Grégoire, co-founder of the marketing consultancy Adding-Light***

The workshop is a formidable tool for collective intelligence. It enables the customer's teams to go much further together, and sometimes quickly. For example, in a strategy workshop, you need a limited number of people to achieve convergence. To make a success of it, you need clear objectives, upstream preparation work with the customer, and good control of the timing. This means choosing the right participants, depending on the issues. For a strategic workshop, you need a limited number of participants to achieve convergence. The human quality and sensitivity to change also count. It has to be a pleasant, energetic moment, including with digital technology.

The tools available have evolved considerably, making it possible to run highly effective remote workshops. It's not just a matter of transposing the techniques adopted in the classroom. In fact, digital technology is an opportunity to completely rethink our approaches, over shorter periods of time, combining independent work and team reflection... When working remotely, it is even more important to choose the right participants for the right problem.

In innovation workshops, or brand strategy activation workshops, we can involve experts to inspire, but also consumers to ensure the relevance of the ideas that emerge. Consumers say things in their own words, and teams often really appreciate this moment of "confrontation with reality".

Tools such as Klaxoon or Miro allow you to share results and get the audience to react. In particular, Miro is a "*whiteboard*" tool (like Klaxoon) that allows you to concentrate post-its, draw and write with others while leading a video conference.

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The results of a study must be emotionally as well as rationally anchored: create a surprise, make the study an experience that can be appropriated thanks to inspiring, lively, and enthusiastic reports, constructed not just as a discursive accumulation of recommendations but incorporating images, video, etc. The downstream part of the study, from the report to its presentation, is what remains of



the work carried out. To maximize its effectiveness, we need to take care with the editorial dimension and integrate the appropriation and implementation phase. What counts is the perlocutionary function, the effect produced by the message transmitted on the receiver.

To judge the relevance of qualitative research in the age of digital and Big Qual, we have looked at a few examples. Each study illustrates a point of methodology. This is also an opportunity to tell you about some of the non-confidential results and to invite you to consult the full study when it is available.

## Chapter 11: Applying the Big Qual approach to studies

Here are some examples of Big Qual in action: documentary research on large corpus, qualitative studies on large samples, 360° exploration, longitudinal studies, in-depth cultural analysis, *crowdsourcing*, citizen consultation. For some of these examples, illustrations or publications are available via a link or a QR code.

### **Example 1: the impact of tableware on food consumption / 2-month *online* qualitative study of 12 households**

#### **Objectives and method:**

The aim of the study was to show the impact of tableware on eating habits and eating better. 12 households recruited in Paris and Orléans were invited to select and then try out a high-quality crockery set (plates, cutlery, glasses, table runner, etc.). The study explored their habits over a 10-day period, during which they chose a set of crockery (worth more than 500 euros). The forum followed the discovery and the daily life of the households for 1 month, with photos taken at different stages of the experiment.

**How is this big Qual?** A two-month study with hundreds of photos of the experience to assess a change in behavior.

#### **Results:**

The study revealed how tableware helps people to eat more healthily by acting as an attention-getter. The tableware demonstrated a dual role:

- As a lever for structuring meals: the crockery focuses attention on what's on the plate, making people want to cook for themselves, and harmonizing the container and content.
- A pleasure enhancer, visually, in terms of taste and conviviality, encouraging diners to eat more slowly, skip meals less and avoid snacking.

To view the testimonials:



To access the full study:



### Advantages of the methodology:

- Rich expression combining verbatims and photos of consumers
- Ability to follow the various stages of dish preparation
- Overview of different contexts of use

### Example 2: Behring and filtered waters / 360° brand audit

#### Objectives and method:

Behring<sup>20</sup> has developed a water filtration process for hospitals that is gradually being extended<sup>21</sup> to catering. Behring's advantage is technical: cavitation and bacteriological safety. Behring wanted to carry out an in-depth study of its name, brand, signature, visual identity, product design and editorial strategy in the context of its competitors.

**How is this big Qual?** By a large-scale documentary watch on filtered water and fountains with a half-day live semiotic analysis.

#### Results:

The idea of filtration is to remove impurities from the tap (microbes, parasitic micro-organisms, excessive minerals such as chlorine, limestone, nitrate) so that it becomes natural again.

**Table The paradoxes of water filtration**

<b>The ideal of filtration: the main theoretical objectives</b>	<b>Filtration in concrete terms</b>
Rediscovering the naturalness of water	Use of an unnatural process
Purifying water	Contamination of the filter by amalgamating bacteria
Rediscovering the natural virtues of water	Reverse osmosis filtration produces mineral-free artificial water.

<sup>20</sup> <https://www.behring-water.com/>

<sup>21</sup> <https://youtu.be/jd-8DywSkT4>

## Behring water advantages table

	Chlorine presence	Accumulated bacteria presence
Network water	++	-
Classic filtered water	--	++
<b>Behring filtered water</b>	--	--

## The Behring identity

The name Behring refers to three things:

- Emil Adolf Von Behring, little-known 19th-century German bacteriologist
- Vitus Jonassen Bering (sometimes written Behring), Danish explorer who discovered the strait that bears his name, separating Asia and America,
- The Behring Strait: the water border between Alaska and Siberia.

The Nordic sound of the name creates a cultural distance and a form of confidence in the user because this cultural distance reinforces the credibility of the brand. At the same time, this foreign sound suggests the idea of a brand with a global vocation.

The logo, in capitals and sans serif, is set in a modern typographic style that reinforces the brand's modern look. The spaced letters suggest freedom and openness. Blue simultaneously refers to two elements, air and water. The blue of the logo brings back the ideology of natural contact with the elements, a new, more original relationship with the elements. The transparency, the magnifying glass effect of the large blue drop and the white edge of the drop are signs of purity and limpidity.

The "Pure for sure" signature brings together an objective element - *purity* - and a subjective element - *safety / security*.

## Advantages of the methodology:

- The value of the documentary approach, which covered all aspects of water filtration brands
- The added value of semiotics decoding, which provided a 360° analysis of the brand, with in-depth analysis of the main attributes (cf. white water, the

video explaining the technical process, the name, the design, the concept, etc.).

### **Example 3: restaurant owners faced with takeaway sales / observatory on adaptation**

#### **Objectives and method:**

In April-May 2020, QualiQuanti carried out a study on how restaurant operators are adapting to the health context. An observatory combined with an *online* Qual forum looked at restaurants that were launching takeaway sales.

**What's big Qual?** Monitoring and analysis of 200 restaurant owners on all aspects of the experience: menu, offer, layout, physical and digital communication, etc.

**Originality:** creation of a catalogue of results with over 2,000 photos for inspiration, a mix of on-the-ground monitoring and observation of websites and social networks.

#### **Results:**

The study gives a few keys<sup>22</sup> to successful takeaway sales.

##### 1) Making your offer visible on site

Local consumers need to know that the local restaurant has reopened, even when it is closed. Similarly, the offer - menu(s), dishes, prices, opening times - should be easy to understand briefly, with photos if possible.

##### 2) Update your digital presence

With just one click, potential customers should be able to find out about the day's menu and ordering conditions, as well as picking up their dishes. This can be done via Facebook, Instagram or the restaurant's website.

##### 3) Adapting the takeaway offer

Tightening up your menu makes it easier to understand what you're offering. It also reassures diners that the ingredients are fresh. Sold cold and to be reheated, the dishes that work have seen their prices adjusted downwards, without cutting back on quantities: they are often generous and build loyalty. Wine is offered as an extra at a reduced price. Flexible opening times mean that dishes can be collected for lunch or dinner.

##### 4) Establish a direct relationship with the consumer

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<sup>22</sup> <http://www.lacuisinepro.fr/wp-content/uploads/2020/06/Extrait-Mieux-vendre-a-distance-Cahier-de-tendances-juin-2020.pdf>

This can be done by phone, SMS, email, Messenger or WhatsApp, using a simple call & collect and contactless payment process. Click & collect works alongside takeaway and delivery. Restaurant owners who have a file of loyal customers can send them their offer every week.

#### 5) Welcoming the customer

Restaurants have transformed themselves into "takeaways": they have installed slates displaying the day's menu on the pavement, they have decorated their outdoor surroundings, they have welcomed customers and delivery staff through a window. The relationship is also built through a presentation that reflects the restaurant's identity, an added extra (bread, amuse-bouche, delicacy), a personalized message or a word from the chef about the menu, its composition, and his advice.

To consult an extract from the study:



#### **Advantages of the methodology:**

Large-scale monitoring with over 2,000 photos to illustrate the study

Restorers are very creative in the way they react

The benefits of a study where you can try out a wide range of products and share your experience

## Example 4: digital video advertising / prospective study

### Objectives and method:

At the time of the introduction of video advertising in digital in 2006, a fundamental study was carried out for Lycos and MPG on the mechanisms for integrating digital advertising. This study was based on a survey of several hundred cases, which were tested in qualitative groups and subjected to semiological analysis. This diversity of examples made it possible to sort out the types of problems and envisage solutions.

**What is big Qual?** Analysis of a phenomenon based on several hundred examples studied in Qual groups and semiological analysis.

### Results

The study highlighted the obstacles to this intrusive form of communication and suggested solutions. The results have been published on Frenchweb<sup>23</sup> :



With *online* advertising, Internet users are subjected to three types of intrusions:

- **spatial** (appearance, overlap, invasion, juxtaposition of spaces, etc.);
- **noise** (unwanted sounds);
- **temporal**: trapped in a tunnel, viewers have to go through advertising to reach their destination.

Three solutions:

1. Disseminate short, discreet messages that take up little space. But there is a risk of going unnoticed...
2. Program relevant messages based on the user's profile, thanks to the integration of data into programmatic buying. This reduces nuisance, but it's not enough...
3. Think of advertising as interesting, rich, multimedia content that Internet users will want to consult and explore. Yes and yes again!

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<sup>23</sup> <https://www.frenchweb.fr/lintrusion-publicitaire-dans-le-digital/293820>

## Conclusion: Optimizing the role of qualitative research

This book is above all a hymn to qualitative research. Big Qual brings qualitative research into the modern age using technology and the exploitation of massive data. But qualitative research will always be qualitative research because the analyst's added value remains paramount. The subtitle of this book is "Scaling Qualitative Research". The aim is to highlight the strength and legitimacy of the qualitative approach.

With Big Qual, Qual must increase its influence in the press, focused on representative surveys, in the evaluation of public policies, in strategy consulting, in the management of CSR and *raison d'être* issues, in the cultural approach to branding, and so on. We need to be able to give more space to weak signals and to rising cultural currents, which have little quantitative weight but great importance in shedding light on the future.

We must accept that certain phenomena cannot be reduced to quantitative data. One solution is to add a qualitative summary of feelings alongside the quantitative indicator. Certain issues that cannot be directly measured need to be taken into greater consideration. Alongside the various efficiency scores, criteria such as uniqueness, aesthetics, delight, use value, meaning, positive influence, well-being, ergonomics, durability, sincerity, etc. should be promoted.

Artificial Intelligence is currently used primarily by Big Data. Apart from textual data analysis, qualitative studies are essentially manual and cultural. At present, algorithms cannot compete with conceptualization by an analyst and integrate historical and cultural perspectives.

Big Qual is an opportunity to put qualitative research on a long-term footing by supporting the various phases of an innovation process, from inspiration to implementation, in close contact with consumers. It's also a good way of moving towards consultancy, with support systems and back and forth with the in-house team.

With Big Qual, alongside Big Data, we have the capacity to decipher, the power of cultural analysis, the tools to co-create with consumers, to capitalize on expertise and to inspire companies.

All the best to Big Qual. For further information, visit [www.bigquali.com](http://www.bigquali.com).



## Glossary

### A

**Ad hoc:** An *ad hoc* study is a study carried out specifically to order to meet a company's precise needs.

**Assisted analysis:** Software that searches for keywords or phrases (supplied by the user) in a corpus.

**Semiological analysis:** Carried out by a semiologist, semiological analysis consists of identifying and describing each of the components of a product or communication, highlighting its structure and the logic behind it.

**Asynchronous (≠ Synchronous):** In the context of studies, the fact of not being constrained to real time and being able to respond at one's own pace

**Self-administration:** The interviewee answers questions independently and without assistance.

**Directed self-production:** Forcing consumers to work: outsourcing certain tasks to consumers in order to save time and increase autonomy (self-service at the petrol station, assembling Ikea furniture).

**Audio & video tracking:** A Qual *online* tool for audio and video media, participants select specific passages and comment on them. An interactive TimeZone shows their perceptions. They record their comments directly in video format from their phone or computer.

### B

**Behaviorism (or "behaviorism"):** A scientific psychology based on empirical observation and experimentation of behavioral phenomena.

**Big Data:** Term used to describe the mass of structured data.

**Big Qual:** Term used to describe the collection and analysis of unstructured data.

**Digital suggestion box:** an initiative introduced by brands such as Starbucks to gather ideas from consumers. In a digital space, consumers can contribute, improve ideas and vote for the best ideas.

**Brand Bureaucracy:** in their book *Cultural Strategy*<sup>24</sup>, Douglas Holt and Douglas Cameron explain the failure of most companies to innovate by their management model, which leads to a standardization of minds and products: *Brand Bureaucracy*.

**Brand content:** Brand content refers to the fact that a brand publishes content. The practice goes back a long way (see the Michelin Guide from 1900 or *Votre Beauté*, L'Oréal's magazine from 1933) and digital has accelerated the phenomenon.

Brand content is a lever for creating value for companies. By shedding light on the cultural background of brands, it enriches the offering, gives meaning to consumers and unites employees. It reinvents the brand's relationship with the public and meets new expectations for dialogue and authenticity. It allows the brand to highlight its point of view on the world. It is essential if a brand is to emerge on the Web, occupy social networks, provide input for executive speeches, exist in the public arena, be considered by the media and shine internationally.

With brand content, beyond its commercial function, the brand embraces an existential role with the consumer: it transforms the status of consumption, which becomes social and cultural. Audience, influence, animation power, partnerships... the brand can now develop strengths traditionally reserved for the media.

**Brand Culture:** Brand culture is a holistic way of looking at a brand. Through its products and services, but also through the places where it is embodied, its style, its values, its ethics, its history, its people, its experiences.... In short, everything. Because a brand is a cultural universe, a composition, a construction over time.

**Bulletin boards:** Qualitative forum over one or more weeks with 15 to 30 people, combining individual and group phases.

## C

**Chat room:** An instant messaging service enabling people to chat together over the Internet.

**Co-researcher:** A member of an online community

**Market Research *Online* Community (MROC):** A public or private social network where consumers are registered to discuss a brand, products, or services.

**Computer vision:** The way computers can gain high-level understanding from digital images or video.

**Collaborative co-production:** when individuals are encouraged to participate: their contribution ranges from data capture to the creation of works.

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<sup>24</sup> <https://testconso.typepad.com/brandcontent/2011/09/la-brand-bureaucracy-un-mod%C3%A8le-de-management-r%C3%A9ductionniste-qui-freine-linnovation-culturelle.html>

**Crowdsourcing:** *Crowdsourcing* or participative production is a form of outsourcing or even collaboration with individuals outside the company.

## D

**Data mining:** exploration of large quantities of data to extract knowledge using automatic or semi-automatic methods.

**Datavisualization:** Data visualization is a set of methods for graphically summarizing data.

**Dashboards:** A set of performance indicators for monitoring an activity, in real time if possible.

**Behavioral declarative:** This consists of asking the interviewee to give an account of a behavior. They will be asked what radio station they listened to the previous day. His answer will be less reliable than if we had been able to measure what he listened to using a watch.

**Desk research:** Documentary research

## E

**Early adopters:** The fans of the first hour

**Emoji:** Japanese term for pictograms used in electronic messages. The word emoji literally means "image" + "letter"; the resemblance with "emotion" is a cross-cultural pun.

**Survey/recruitment survey:** To recruit participants for a study, whether *online* or offline, the recruitment survey aims to generate a pool of volunteers. A recruitment survey asks a short series of questions:

- profile: age, gender, place of residence
- a description of the uses and habits of the subject under study
- availability and motivation to take part in the study.

**Ethnology:** The field of human and social sciences that studies the origins and socio-cultural characteristics of ethnic groups and human groups: history, behavior, migrations, land, mixtures, etc.

**360° studies:** Panoramic studies covering all the contact points or all the dimensions of a subject.

## F

**Feedback:** Customer feedback on their satisfaction with a product or service.

**Product sheet:** The purpose of a product sheet is to help buyers make their decision. The act of buying is the result of a process, which consists of weighing up the options, examining the object, comparing it, looking at opinions, determining a preference and, finally, deciding. This process needs to be supported by detailed, explanatory, and objective communication, providing the information you need to make your choice.

**Online focus groups:** group meetings held in real time via chat, followed by audio, chat and webcam via telephone videoconferencing software.

## G

**Gamification:** The use of game mechanisms, particularly in studies.

## H

**Heatmap:** *Online* tool for testing visual media where participants select the areas they wish to comment on, both positively and negatively. A summary diagram uses warm colors to indicate the areas most frequently commented on.

**Holoptism:** According to Jean François Noubel, holoptism is defined as "a physical or virtual space whose architecture is intentionally designed to give its players the ability to see and perceive everything that takes place there".

**Hyperwatch:** Width and depth analysis. By monitoring all the variations, we can gain a good understanding of the object and identify its strengths.

## I

**Immersive research:** The fact that an interviewee/consumer is able to reflect, express themselves and immerse themselves in the subject of a study.

**Incentive:** A symbolic reward or gratification

**Insight:** A flash of understanding that provokes jubilation or the psychology of discovery in Gestalt Theory. In marketing, these are solutions to problems which consumers themselves are unaware of.

## J

## K

**Knowledge Management** : Knowledge management: tools designed to create an optimal flow of knowledge for business success.

**KPIs**: acronym for key performance indicator. A KPI is used to monitor and measure the effectiveness of a marketing action.

L

M

**Macro, Meso, Micro**: Dominique Desjeux's method of using observation scales to analyze consumers.

**Mapping drag & drop**: A tool where participants can position images, logos, and text on a predefined background (decor, mapping, graphics, etc.).

**Sequential mode**: Corresponds to the oral style, of unfolding over time: face-to-face or over the telephone, the survey is administered by an interviewer and the interviewee gradually discovers the questions.

**Panoramic mode**: Corresponds to the model for self-administered paper questionnaires, where respondents have an overview of the survey.

**Moderator**: Plays the role of forum moderator, giving everyone time to express themselves and read what others have to say.

**Moodboards**: A collage of images, objects or words to express a trend.

N

**Native advertising**: Sponsored content that is relevant to the user, does not interrupt the reading experience and is integrated into the editorial environment in which it is displayed.

**Nomadism**: A way of life characterized by the movement of human groups to ensure their subsistence.

O

**Open data**: Open data is digital data that is freely accessible and usable by users. It can be of private or public origin, produced in particular by a local authority or public institution.

P

**Proprietary panel:** A proprietary panel is a panel exclusive to a company. It is a database qualified according to the company's own needs, and all its members have given their "opt-in" agreement to participate regularly in studies.

**Panelist:** Member of an online panel

**Pop-up stores:** These are ephemeral commercial spaces

**Post:** A publication on social media

**Product content:** The editorial content that enables people to choose to use a product or service.

**Opt-in profiles:** The prior and explicit consent given by an individual to receive information or take part in surveys.

**Profiling:** The automated processing of personal data which involves using that data to evaluate certain aspects of the data subject, and to analyze or predict his or her interests, behavior, and other attributes.

**Publi-redactional:** Straddling the line between traditional advertising and editorial, this is an article in which readers can detect the commercial intent.

Q

**Qual (for "Qualitative studies"):** Qualitative studies involve questioning and observation methods. They are traditionally based on individual interviews and group meetings (focus groups of around ten people) with limited samples, ranging from a few units to a few dozen people. They include observation in situ and documentary collection. They aim to understand a market and decipher a material, social and symbolic reality. They draw on the human sciences, ethnology, psychology, sociology, semiology, linguistics, and general culture to give meaning.

**Quant (for "quantitative studies"):** Quantitative research, often contrasted with qualitative research, is associated with the idea of measurement. The methods used include panels, barometers and surveys involving samples of several hundred or even thousands of individuals. The aim is to generalize the results over many people.

R

**RGPD "General Data Protection Regulation" (GDPR):** The General Data Protection Regulation governs the processing of personal data within the European Union.

S

**Safari retail:** Expression used to describe visits to shops in a given area with photo shoots.

**Virtual trade fairs:** group meetings hosted over the Internet using specialized chat software

**Self-video:** A video filmed by the consumer themselves, in which they report on their experience.

**Semantics:** Study of the meaning and significance of signs, particularly in language.

**Semiotics:** The science of organizing signs and discourse

**Slide cast:** An on-screen presentation or podcast that combines audio with a slideshow presentation.

**Social listening:** monitoring and listening to social networks.

**Speech-to-text:** Speech recognition software that transforms speech into written text.

**Stimulus/stimuli:** Elements designed to trigger a reaction in the interviewee.

**Story Mining:** The art of finding interesting stories to tell about brands.

T

**Test & learn:** experimenting, developing, trying out new things before finding your way

**Touchpoint:** An advertising or commercial contact point between the brand and the consumer.

U

**User experience (UX):** The quality of the user's experience in any interaction situation. UX considers usability (the "ease of use" of an interface) and the emotional impact felt.

**User-generated content (UGC):** content generated by consumers.

V

**Verbatim:** Faithful reproduction of the words spoken by the interviewee.

W

**Web listening:** Constantly monitoring the social web and forums.

**Whiteboards:** Tools used in videoconferencing software where participants react to visual material and express themselves by circling, selecting, and arranging the elements being tested according to their preferences.

**Workshops:** Collaborative workshop used in particular to promote the ownership and implementation of a study.

X

Y

Z



## Acknowledgements

This book was written by the QualiQuanti research institute. Studies carried out since 1990 have helped to inform the discussions and illustrate certain examples. I would like to thank all the contributors, starting with Matthieu Guével, who contributed to the methodological research via our blogs and white papers. Raphaël Lellouche, who did most of our semiological work, contributed a number of key concepts. Claude-Emmanuelle Couratier and Pierre Gaillardon played an active role in the *online* studies and in setting up the research tools. Guilhem Pratz helped us create our various panels. Mariette Munier played a key role in the writing of the book, which she accompanied. Estelle Contrain transcribed all the interviews in the book with patience and efficiency.

Thank you to all the clients who have called on QualiQuanti and who have explored our methodologies with us. I dedicate this book to Henri-Paul Roy, who was the first to work with us on *online* qualitative research when he was working for Europe 2 and who passed away in 2017.

Thank you to everyone I interviewed in the course of preparing this book: Boris Moscarola (associate director of Le Sphinx Développement), Mélanie Porez (sales and marketing director of Made in Studio), Yannick Baduel (managing director of Update France fields), Béatrice Maccario (managing director and co-founder of Krealinks), Claire-Marie Lévêque (creator and consultant at Happenability), Diouldé Chartier-Beffa (founding partner of DCAP Research), Louisa Taouk (director of Kaliwatch international), Nicolas Riou (founder and CEO Brain Value), Yves Bardon (consultant at Ipsos), Christian Langevin (CEO of Qwam), Odilon Cabat (semiologist consultant), Matthias Jeanson (formerly of Linkfluence), Rozenn Nardin (deputy head of the Veille & Analyze Analyze Expert) and Céline Grégoire (co-founder and brand strategist at Adding Light). Thank you for your time and your valuable *insights* into the world of research. Thanks also to Jean-Maxence Granier (director and founder of Think Out), Guillaume Weill (digital and data entrepreneur at Keep your dream), Charlotte Tortora (founder of CH2 conseils), Anne-Marie Brayer (head of user experience and sensory for Danone Waters), Valérie Satre (Global Consumer Intelligence & Market Trends Director at the Sequoia group) and Céline Grégoire (co-founder and brand strategist at Adding Light). Market Trends Director at the Seb Group and initiator of the SEB&you consumer panel), Nada Gholam (WarnerMedia) and Dominique Desjeux (Anthropologist and Professor Emeritus at the University of Paris, Sorbonne) for sharing their experiences and visions of Big Qual.

Thanks to all those who took part in proofreading the book. Catherine Montrade was involved in the upstream work. Claire Kiragossian Chivot was the first proofreader. Thanks to Marie-Noëlle Leboeuf, Pascal Lanot, Martine Ghnassia, Sylvie Bouvet, Pascale-Emilie Gaillard de Luca, Goulven Baron, Corinne Jarry, Michel Soufir, Judith Roucairol, Hélène Destombes, Anne-Laure Boisson and Sylvie Kreitmann for their

judicious suggestions, to Denis Colcombet of 29juillet.consulting and to Gaëlle Nessler for their insight. Thank you to all the beta readers who agreed to be reader-contributors, in line with the collective intelligence approach advocated in the book. Thank you to Macif's Commitment Department, which supported the writing of the book by getting involved in a professional review of the manuscript.

Thank you to Dunod, who believed in the publishing project, and to Chloé Schiltz, who steered it through.

Thank you to Le Sphinx Développement, which provided editorial and financial support for this book. I had my first methodological discussions with Jean Moscarola and I'm pleased that his son Boris Moscarola has accompanied us on this adventure. Sphinx is a piece of software that has always given pride of place to textual data and plays an important role in training for *online* studies. May this book enlighten students and professionals on these subjects. We are offering a free trial of the software. Here is a QR code to access it.



Thank you to Marc Bidou from Bilendi and William Yattah from Bilendi Discuss for their support and relevant solutions. We regularly use Bilendi's panels, which are effective for *online* pitches and consumer recruitment. The Bilendi Discuss platform allows us to centralize feedback and resolve RGPD constraints. Here is a QR code allowing you to test Bilendi Discuss.



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