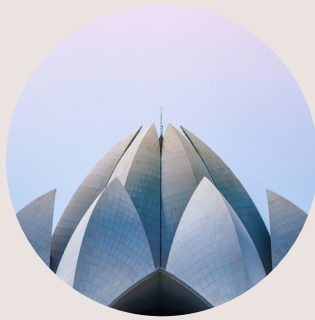


Conducting Online Research in Asia.

The Go-To Guide



The Global Boutique for Data and Insight.

Kadence International is a global boutique market research agency. With offices spanning Asia, Europe and the US, we combine the global reach of a large agency, with the agility and personalised service of a small boutique.

We passionately believe that great research is core to all business success so it's our mission to raise the impact of research in organisations.

The impact we create for our clients is being recognised by key awarding bodies globally. In 2019, we were named Market Research Supplier of the Year at the Quirk's Marketing Research and Insight Excellence Awards, as well as Highly Commended for Global Agency of the Year at the MRS Awards. In the same year, we were named Market Research Agency of the Year at Marketing Magazine's Agency of the Year Awards in Singapore.



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Introduction

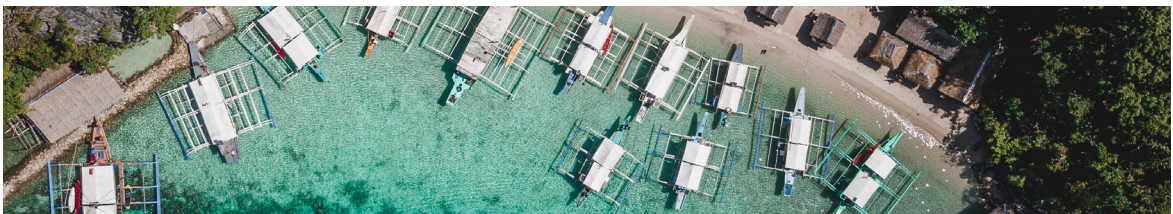
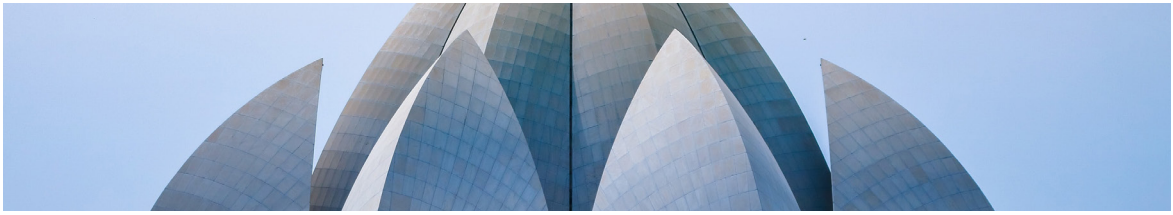
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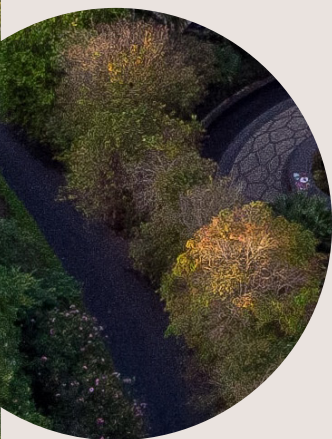
In most countries across Asia, face-to-face has long been the dominant form of market research - and this is likely to be the case for some time to come. In recent years, however, online has come to the forefront as consumer behavior has shifted globally, opening up new opportunities for those looking to conduct research in the region.

To equip our clients with the knowledge and tools to execute online projects successfully, we've produced this best practice guide.

We've drawn on local market experts across our 8 offices in Asia to share their knowledge. Read on as they outline the feasibility of online research in each country, and the cultural considerations you need to bear in mind when selecting a methodology and designing a study to set it up for success.



1 Online Research in Singapore





Derek Goh

Insight Director

Kadence International
Singapore

I've been a market researcher for more than 15 years, during which I've done countless projects conducted through online and offline methodologies, both in Singapore, and across Asia. It's a common research cliché to say that 'one size fits all' does not apply in Asia, and that the only unifying factor across all Asian markets is their very uniqueness. As such, I'm happy share my view on why Singapore is a market where brands stand to benefit from online research alongside offline research.

Singapore is one of the most technologically-advanced countries in the world, with internet penetration not that drastically different from the US and indeed higher than many European nations such as Spain, Portugal and Austria. The government's 'smart nation' ambitions are laid out in a masterplan that constantly gets revisited and progress against it tracked. Digital device ownership is high, and digital literacy is something that's improving, even amongst elderly Singaporeans. It is becoming a common sight in the suburbs to see older Singaporeans making their way to the local community centre for regular lessons on smartphone usage or getting online, while savvier ones conduct video calls with distant loved ones across time zones, with a smile plastered on their faces.



What this all means is an increasing willingness amongst clients to explore digital means of qualitatively engaging Singaporean respondents. Though still not the mainstream methodology of choice, we at Kadence International have interacted with consumers in Singapore via online communities on the topic of financial management, understood their preferences when it comes to beer via mobile diaries, and even explored their attitudes and expressions online on the topic of camera usage via social listening. Online quantitative surveys have always been the norm in Singapore, so it's good to see an increasing willingness on the part of clients to adopt a similar way to engage and understand local consumers qualitatively.

From these experiences, we have honed best practices that guide every piece of online work that comes our way. For example, because Singaporeans are generally quite experienced and savvy with tech platforms, we are able to make our task introductions concise, thereby focusing on what we want them to complete or achieve. Also, culturally we may not be as open to casual acquaintances, but the right tonality on the mobile platform will definitely encourage very effusive inputs when it comes to tasks, sometimes even through the form of videos and images! On top of that, working with the right recruiters / fieldwork managers is even more crucial for online fieldwork compared to offline, as they are the crucial link to ensure sustained participation, especially for longitudinal studies (i.e. more than 10 days).

Despite Singapore's position as a digital leader, over the past 5 years, there have been sporadic episodes of data breaches, even at government agencies, which have affected the daily lives of average Singaporeans. This is on top of the occasional 'phishing' instances and increasingly common episodes of white-collar crimes conducted on the digital / mobile platform.



Though not catastrophic in nature, these instances do reduce overall consumer confidence in digital platforms to a certain degree, while highlighting increasing consciousness amongst consumers about their rights to personal data and digital privacy. This needs to be considered when implementing any form of online research.

The impact of this is that we need to think carefully about how we set up a study and what we say to reassure respondents participating in online research. Clarity around what kinds of information will be collected, how it will be used, and giving people the option to opt in and out of some of these, will definitely work towards reducing reluctance to participate, as well as increasing willingness to be even more open towards sharing their thoughts and the data points that we ask of them. It can't just be a 'blanket' set of generic text filled with jargon, because that will not sufficiently explain the importance of them sharing their information, and of us respecting what they have shared.





As mentioned, offline research is still a popular option in the Singapore and there are a number of reasons for this in spite of the efficiencies that online alternatives can offer. The small size of this 'red dot' island nation means that it can be easier and quicker to track hard-to-reach individuals in person rather than online. Offline is often favoured by government-related agencies, because more Singaporeans are choosing to forgo having a landline in their homes, instead relying on a mobile phone number. That means while it used to be possible to achieve representativeness on a neighbour level via the home telephone, going face-to-face is now a more effective method.

In Singapore we see a matrix of reasons why considering both online and offline research is important. From demographic shifts and technological adoption, to legislation and daily behaviour, we see that the market houses consumers that can be optimally reached through a mix of methodologies. This is the key takeout from my years of experience running both kinds of research across Asia, and underlies my belief that any brand that wants to truly understand Singapore as a market will stand to maximize that understanding if it starts by recognizing the value that combined methodologies can bring.

The Dos and Don'ts of Online Research in **Singapore**



DO



DO always incorporate frequent tech checks into your research. Even with good digital infrastructure, tech failures will interfere with the research process.

DO try to mimic 'offline' interactions. Just because there is no physicality doesn't mean all the rules of in-person / face-to-face engagements are out the window (e.g. remember to wave goodbye).

DO set aside ample time for analysis / data collation. Qualitatively, there's potentially going to be a lot of data points that need to be combed through at the end of the fieldwork stage. Even with the most advanced of tools / platforms, you will still need to have enough time to properly analyse the resulting input from respondents.

DON'T



DON'T assume digital platforms are easy-to-use. As researchers, we are exposed to many product offerings for online qualitative research, which can lead us to ignore the fact that some respondents may not be as familiar with how it works as we are. As such, some form of 'training' or demo may be necessary to ensure the technology does not get in the way of the research.

DON'T forget to leverage body language / unspoken cues. During an online interview process, the same rules apply (e.g. maintaining eye contact, wearing appropriately coloured clothes to convey friendliness, etc.).

DON'T ignore the power of regular encouragements. Be it in the form of additional incentives or other non-tangible ways, engaging with participants online longitudinally can definitely benefit from these little nudges, which then leads to more sustained efforts, as well as better output.

2 Online Research in Indonesia



Benediktus Glenn Timothy

Senior Manager,
Marketing & Operations

Kadence International
Indonesia



For tens of years, market research in Indonesia has been conducted face-to-face, using pen and paper. Even up until now, face-to-face interviews are still the dominant methodology used for market research in Indonesia. There are many reasons for this – mainly a historical preference for face-to-face and its value in reaching people across the country, beyond the urban areas. However, the need to collect faster responses to inform more rapid decision-making, has brought a new wind of change to the market research industry, especially in the last three years.

This is where mobile or online surveys have a part to play. Cost efficiency and shorter project turnaround means this online methodology is gaining popularity, particularly as internet connectivity increases across the country. According to a recent study from Google, the number of internet users in Indonesia has reached 175.4 million - a penetration of 64%, up by 17% from the previous year. 96% of these internet users are already using smartphones. These numbers demonstrate that there's a real potential for mobile or online research in Indonesia. At Kadence, we are at the forefront of this, having built our own proprietary online panel.

There are a number of important considerations when it comes to the successful execution of online research in the Indonesian market. The first is to find a compelling way to incentivise people to take part in the research. At Kadence Indonesia, we've been inspired by the strategies that Indonesian e-wallet platforms have successfully used to build a huge customer base. The higher the cashback or promotional programme, the more people will use the application for payments. We've adopted this principle to build our online panel and incentivise them to take part in research. A monetary reward, rather than food or shopping vouchers, is much more appealing amongst Indonesian consumers.

When designing the research, the length of the questionnaire should be as short as possible to encourage completion, particularly as many people will be taking part in the research via smartphones. The type of smartphone used will vary widely – so testing across multiple devices is essential. It's also important to remember that Indonesia is a country with numerous islands and a broad geographical area. Whilst there is internet penetration in rural areas, not all consumers will have the same internet speed or network connection.





Hence, long videos or too many pictures in your survey is not advisable. Finally, when it comes to language, the survey should be written in Bahasa, with English provided as a secondary option.

To encourage people to fill out the survey, we think beyond in-app notifications, which some users can turn off. We recommend notifying users via text message or WhatsApp instead of via email. Whilst this is used widely across the country, consumers in rural areas of Indonesia still have limited access to email and even those that do have email, are not regularly checking their inbox.

Finally, when it comes to monitoring the quality of the data, we recommend tried and tested techniques such as using algorithms to ensure the answers are from genuine respondents and are not randomly answered and also matching the length of an interview and the time gap of the questions selected. Another quality control metric that's important to consider in Indonesia is that each respondent has a valid ID number that matches their Kartu Tanda Penduduk (a National ID card that is compulsory for all Indonesian citizens), commonly known as KTP to ensure all respondents meet the intended demographic profile for the research sample.

Online research in Indonesia might still be in its infancy but it has real potential, particularly as internet penetration in the country is growing rapidly. We are looking forward to being at the forefront of this fast-moving development as we seek to meet the evolving needs of our clients.



The Dos and Don'ts of Online Research in Indonesia.

DO



DO find the appropriate way to incentivise people for taking part in online research. Cash rewards are likely to have greater appeal than vouchers.

DO always use Bahasa as the main language for research in Indonesia.

DO consider alternatives to email when you're prompting people to fill out the survey. In rural areas, text messages and WhatsApp will be much more effective.

DON'T

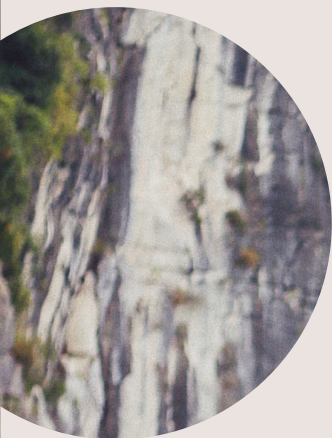


DON'T be tempted to make your surveys too long. The shorter the length, the higher completion rate you will achieve.

DON'T use too many videos or pictures that are hard to access in areas with poor bandwidth.

DON'T forget the importance of quality control. Make sure that each respondent has a valid ID number that matches their KTP.

3 Online Research in Vietnam



Kengo Kurokawa

Managing Director

Kadence International
Vietnam



In Vietnam, face-to-face is the dominant form of market research. This is surprising given that almost everyone in Vietnam – from those in their teens to those in their forties - owns a smart-phone, and this is the case regardless of where they live. Vietnamese consumers spend hours of their time online – on Facebook, YouTube, messaging apps, for online shopping and for online deliveries. What's more, as in other developing markets across Asia, the network connection in Vietnam is good and Wi-Fi is free at almost every café and restaurant.

This represents real potential for online research in Vietnam – an area that we've tapped into here at Kadence. We are one of the pioneers of online market research in Vietnam. We initiated our online market research service with our own panels and platform in 2015 and now, we have the biggest direct panel in Vietnam – with 500,000 consumers.

We conduct over 100 online market research studies annually but not every organization has embraced this approach. In Vietnam, many marketers have tended to favour traditional, face-to-face methods. But why is this? And is the situation changing?

One factor is the cost competitiveness of traditional approaches. Unlike Europe, the US or Japan, the labour cost in Vietnam is very affordable, meaning that online hasn't offered a substantial enough pricing advantage to drive rapid adoption. Another factor at play is an assumption that online panels can only reach certain audiences. This couldn't be further from the truth for us at Kadence. By providing dynamic incentives and recruiting respondents using both online and offline methods, we've built a panel of over half a million consumers, with wide coverage of age, areas and social incomes.





But whilst marketers in Vietnam have tended to be quite conservative when it comes to their approach to market research, we are seeing a wind of change. Marketers are realising the benefits online research has for providing market understanding quickly and efficiently, and that it can be used as a complement to, rather than a replacement of traditional research. Many marketers have experienced first-hand the benefits online research can bring in terms of speed, cost, quality and flexible real-time analysis of data.

Consumers are ready. The infrastructure is ready. Now with ever more local marketers starting to embrace online methods, the door is well and truly open for online market research in Vietnam.

The Dos of Online Research in Vietnam.

DO



DO pay attention to who you're trying to reach. Lifestyle, behaviours and opinions vary dependent on social class in Vietnam. This means it's important that you define what social classes you want to explore, in addition to the other demographic criteria.

DO be aware of the differences between the North and the South. Vietnam has two big cities – Hanoi in the North and Ho Chi Minh in the South and there are cultural differences between consumers in these areas. Those in the North tend to favour products from well-known brands, while those in the South are more open to trying new things. Your research will need to take these geographical differences into account, particularly when you're conducting a concept check, campaign effectiveness and brand equity research.

DO utilise images and videos to avoid misunderstanding. When conducting face-to-face research, interviewers have the opportunity to explain complex concepts to respondents in person. Online, this isn't possible but images and videos can be good alternatives for aiding understanding, thereby increasing engagement and the quality of responses.

The Don'ts of Online Research in Vietnam.

DON'T

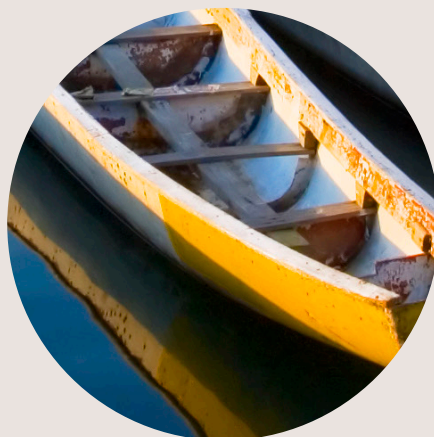
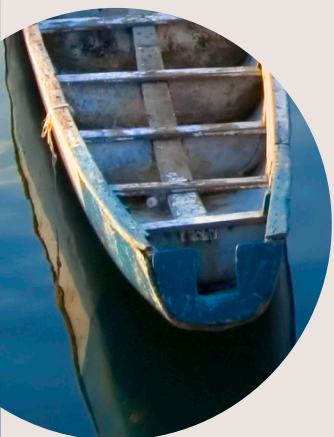


DON'T make the questionnaire too long. Keep your questionnaire simple and make sure the total survey duration is no longer than 25 minutes.

DON'T get too overexcited about high levels of interest or purchase intent. When asking about interest levels or purchase intent be mindful that the figures you see in ASEAN developing countries tend to be higher than in other markets. Vietnam is no exception. The Vietnamese are optimistic and interested in a variety of new things. But some talk about their purchase intentions without considering about their economic status. Responses need to be compared with other market data to make informed business decisions. This is an area we specialise in.

DON'T use too many open questions. Open questions can help you understand the opinions of respondents in more depth but in Vietnam consumers are not always experienced enough to share their opinions in a manner that's useful to researchers. There is a tendency for respondents to focus on feelings and emotion, rather than logical explanations, meaning that the results from these open answers can be short and vague. We recommend keeping questions concise and concrete.

4 Online Research in the Philippines



Bernadette Suba

Project Manager

Kadence International
Philippines



Online research in the social media capital of the world

According to *Digital 2020*, a report produced by We Are Social and Hootsuite, Filipinos spend the most time online and on social media of any country. Despite the Philippines lagging behind in terms of connection speed, Filipinos spend an average of 9 hours and 45 minutes a day on the internet across any device. According to the report, internet penetration in the country is at 67% and 73 million Filipinos are active social media users, usually spending an average of 3 hours and 53 minutes on social media daily.

The country's largest social media user group is dominated by Filipinos aged 18-24, with college students and young professionals being much more inclined to try and download different social media apps for personal, work or school reasons.

Mobile phone usage has gained dominance over desktop with regard to all sorts of internet activity, particularly in the areas of instant messaging, playing games and e-commerce. 73% of Filipinos access Facebook, the number 1 social media network in the country through mobile only.

The adoption of online research methodologies has been slow in the country

Despite the widespread adoption of social media and growing internet penetration, offline face-to-face recruitment and interviews are still considered the most common methodology.

The main reason is that Filipinos have also become cautious when answering calls or responding to online posts or messages from unknown numbers, due to a high case number of online scams, identity theft, and bank fraud, which continues to climb. As the majority of transactions in retail, government agencies, and banks are becoming digital, consumers' fear of cyber-fraud has intensified. In response, the Philippine government enacted R.A. 10175 known as the Cybercrime Act to be able to curtail illegal online activities.

Another reason for the dominance of offline research is that Filipinos hold personal face-to-face communication in high regard as the genuineness of the person you are speaking with can easily be revealed. In contrast, other methods, particularly phone calls can be perceived to be invasive and intrusive.





Bridging the gap

Since its inception, Kadence Philippines has adopted technology-based solutions to usher in the use of digital as part of quantitative and qualitative studies. We have partnerships with trusted online panels and when interviews are done face-to-face, these are conducted using tablets, with the answers uploaded in real-time, with GPS locations tracked and the opportunity to record audio or video.



For qualitative projects that require pre-work or diaries, this can be done effectively online – but the approach will differ based on the people you’re trying to reach. For high income class respondents who have their own laptops and desktops at home, pre-work or diary tasks can be done by providing templates they can work through in their own time on these devices. But for low to mid economic class respondents, where mobile is the dominant device, you should consider using instant messaging apps like Facebook Messenger, Viber, Skype, or WeChat to allow people to complete these tasks in real-time on an appropriate platform.

There is also real potential to use online communities for research in the Philippines, particularly to connect with millennials and Gen Z. Sharing on digital platforms comes naturally to this demographic, compared to older respondents who may have reservations about privacy. There are a host of platforms that can be used for online communities and the choice of platform will depend on the project. For straight forward customer understanding projects, Facebook Groups can be a good option as Filipinos are very familiar and comfortable with communicating in this way. But for more complex projects, such as ad or concept testing, more sophisticated platforms are available. Designed specifically for research projects, these are better suited for protecting the confidential nature of the stimulus and aiding with analysis.

Online depth interviews and online focus group discussions are also possible, but due to slow internet speeds in the country, they should be reserved for B2B projects and high SEC individuals with a stable internet connection. While these can be conducted via audio or chat, we'd recommend using video in this market - since Filipinos are very dependent on personal interaction, having a video chat bridges the lack of personal presence.

The Digital Wave

The Philippines has been thrust from a cash-based, face-to-face economy to a world where digital finance, online messaging platforms, and telecommuting for work has become the norm. A fast and stable home internet connection has gone from a “nice-to-have” to an essential utility for work and leisure, thereby increasing the feasibility of online research methodologies.

In this new digital era, we see online methodologies having a vital role to play in people's day-to-day lives. This has transformed the way research is approached in the country. We stand ready to embrace the change.





The Dos and Don'ts of Online Research in the Philippines.

DO



DO get in touch with respondents before the research is scheduled to start to ensure they can access the platform smoothly.

DO allow time to build rapport with respondents. With face-to-face interactions highly valued in the Philippines, this will make respondents feel more at ease with speaking in front of a webcam or into their smartphone.

DO provide step-by-step instructions to the respondents so that they can explore the online platform and use it effectively.

DON'T



DON'T forget to ask respondents about their internet speed, particularly when recruiting for online focus groups or depth interviews to ensure that their connection will be stable enough to take part.

DON'T forget to manage your time when gaining the trust of respondents. Filipinos are storytellers so it's important to balance that all-important rapport-building, with keeping on your respondents on track.

DON'T use technical terms when talking respondents through a new tool. Focus on using simple language that makes it clear what they need to do to take part in the research.

5 Online Research in China





Nicole Sun

**Customer Service
Manager**

**Kadence International
China**

Online research has taken off at a faster rate in China compared to other Asian countries. Network coverage across the country is good and as one of the first markets to facilitate social media commerce, Chinese consumers tend to be digitally savvy. This, combined with their familiarity with multi-functional apps like WeChat, means there's real scope to use more complex digital platforms for research in the country. Even older consumers can be reached through these means. Relative to other markets, there is a better chance of getting respondents aged 55+ years to participate in online research, due to their steadfast refusal to be left behind by the 'digital divide'.

The impact of COVID-19 further accelerated the adoption of online methodologies. Companies have had to embrace alternative ways of doing research, which have brought with it a number of benefits.

Firstly, China is vast. We have 660 cities, including 36 first-tier cities and 237 second-tier cities. Whereas offline research can only be conducted in 2 – 3 cities, the geographical scope of an online project

can be much broader, allowing for greater representation of the different areas within China, that extends beyond advanced urban centres. This can be incredibly valuable, given the fast pace of economic development in Tier 3 cities and more rural areas.

What's more online research has the benefit of being anonymous, allowing respondents to talk more freely than they might in a face-to-face situation. This makes online particularly good for exploring topics that a respondent may not want to discuss in public, but it's also a great tool for product or concept testing. Because of the Chinese habit to moderate answers and avoid causing offence, doing this in group settings can be tricky. In contrast, exploring views one-on-one as part of an online community will help you understand what Chinese consumers really think about products or ads.





When, it comes to designing your approach, there are a number of things to bear in mind to make sure you get the most out of online research. Firstly, do ensure the platform that you are using is mobile-first. China as a market experienced the technological ‘leap frog’, so be wary of assuming that everyone has a personal computer or laptop. Also be mindful of the fact that the firewall can make implementing any form of online research a little trickier than usual, especially if you’re launching it from outside of China. Don’t forget to keep testing the viability / stability of your platform. This will ensure that you end up spending more time on the insights, rather than troubleshooting.

It is undeniable that the China today is a stark difference from the China of recent decades. The rapid pace of change means that research methodologies need to evolve to ensure ways of harvesting insights continue to stay relevant, up to date, and effective. That said for brands, and for market researchers, offline research does continue to provide ways into the cities and allows for the experiential aspect of research to really come to life, particularly if it is ethnographic in nature. 'Lived experiences' of consumers are best expressed and understood when offline research is applied. But at the same time, the digital dominance in China presents a real opportunity to leverage this medium as means to communicate and reach the hearts of where consumers are today by speaking their language and connecting with them where they are – their digital world.



The Dos of Online Research in China.

DO



DO brush up on your knowledge when it comes to 'internet speak'. Being 'mobile first' and experienced in online interactions has led to locals adopting expressions which may only exist in the virtual world. Moderators should have some working knowledge of these terms.

DO 'mind your language'. Chinese consumers can be quite reserved when it comes to discussing particular topics, so be mindful of how questions are asked, especially if they are potentially sensitive. That said, don't begin your research with preconceptions and assume that respondents in China do not have strong opinions – a good moderator is able to ensure respondents feel comfortable and willing to share their thoughts – you'll be surprised!

DO 'read the room' even if your focus group is taking place online. Like many North Asian markets, what respondents choose not to say is sometimes as revealing as what they do say. While good moderators always know the importance of follow-up, 'reading the room' is just as important to make sure the questions do not lead to awkwardness.

The Don'ts of Online Research in China.

DON'T



DON'T forget to check relevancy of incentivization if not awarding cash incentives. Vouchers have to be relevant and usable in the market (e.g. Alibaba).

DON'T think about 'probing', think more about conversing in live chat or a discussion forum with participants, this can help to foster engagement and depth of responses.

DON'T be afraid to dig deeper. The Chinese language and its manner of speaking can lead to respondents not being direct with their responses. If you do not quite understand what they really 'mean', feel free to (politely) seek clarification; they will often gladly oblige to share more details.

DON'T forget to tailor your approach to different regions or tier of cities, as China encompasses vastly different cultures.



6 Online Research in Japan





Market research in Japan has been transformed by the emergence of online research. While other Asian markets continue to favour more personal, face-to-face techniques, Japanese culture is perfectly suited to this more arms-length approach, especially when it comes to researching conventional, mainstream audiences. Online research means that Japanese consumers don't have to personally interact with researchers in person to complete surveys; a factor that circumvents a Japanese antipathy towards personal interactions with strangers. The idea of sharing personal information can make some Japanese consumers deeply uncomfortable and extends itself to a desire to avoid picking up phone calls from unknown numbers, which means telephone research in Japan is difficult to execute, too.

On the other hand, online research methods remove human interaction from the research process, encouraging participation from respondents who may not enjoy the process of a face to face interview or focus group. Respondents can relax without the pressures of sharing directly with another individual and are more likely to give honest and detailed responses when giving answers at their own leisure. Likewise, online research methods provide a sense of control to the respondent.

Unlike in a face-to-face interview, every question in an online survey is predetermined, and while this impacts the level of insight a researcher can reach, it provides a safer environment for respondents who are concerned that the spontaneity of a 'live' interview may lead them to revealing too much information, or at least a feeling of great social awkwardness.

What's more, Japanese infrastructure lends itself to online research. Commute times into Tokyo and other major cities like Osaka and Nagoya are typically an hour in duration, which means that many Japanese have at least 2 hours each day of 'dead time'. And, with incentives provided to all who take part, online research is arguably one of the best ways to monetise this time. With high quality 3G and 4G networks in existence for years now, this has allowed online research to flourish during the commute.





Although face-to-face research benefits researchers elsewhere, creating a personal relationship with respondents and opportunities for spontaneous questions that lead to deeper insights, these advantages are negated for researchers in Japan. The dominance of online research in Japan can be surprising to those less familiar with the country, but its capabilities to reach huge numbers of respondents quickly, cheaply and comfortably, mean that it is by far the best option for gaining accurate, primary quantitative data.



The Dos and Don'ts of Online Research in Japan.

DO



DO make sure you disclose the organisation conducting the study when recruiting from an online panel. This is mandated by Japanese privacy law.

DO be mindful of positive bias and that Japanese consumers are wary of giving negative feedback. For example, when asked to answer Likert scales, most people will answer somewhere in the middle. Japanese respondents tend not to choose strongly agree or strongly disagree.

DON'T



DON'T assume a 5 point scale is your only option. If you want a clearer go or no-go result, consider using a 4 point scale.

DON'T use too many scale questions. Make sure you mix up the type of questions used in your survey to keep it interesting and engaging for respondents.

DON'T forget to ensure that your survey is optimised for mobile. This will enable you to harness a valuable time to reach respondents - on the commute.

7 Online Research in India





Tulika Sheel

Associate Vice President



Varun Sahai

Associate Vice President



Sandeep Kaul

Insights Lead

Kadence International India

In India, online only accounts for a small share of the market research market. The overwhelming majority of market research projects here take place face-to-face. But with the growth of digitization, brands are increasingly considering online options where possible.

The dominance of face-to-face market research can be explained by a number of factors, and these need to be carefully understood in order to successfully pivot to an online approach. In metro and tier 1 cities, laptop ownership is commonplace and as a result online panels are fairly well established. But metro and tier 1 cities aren't representative of India as a whole, and in suburban and rural areas it's a different story. Panel coverage is limited and this, combined with low levels of literacy and a cultural predisposition to trust in-person over digital interactions, means that face-to-face is the preferred approach for conducting research in these areas.

What's promising though is the high levels of mobile penetration in suburban and rural areas. Thanks to new mobile data plans, most households in these areas have access to at least one mobile phone between them, and this only looks set to improve.

So what does this mean for online research in India? The first thing to be mindful of is that there is no one size fits all approach. Of course the methodology used for any project needs to be carefully considered, but in India it's of crucial importance that you bear in mind the target group of respondents you want to reach and the devices they have access to.

In metros or tier 1 cities for instance, digital depth interviews conducted on a laptop or desktop via Skype will be a good way to reach more niche audiences that can't be accessed through online panels, for example, people who own a particular model of car or buy a certain brand.





For conducting research beyond these cities, you'll need to turn to mobile - but it's important to bear in mind that bandwidth can be an issue. Because of this, you should avoid any methodologies that are too heavily reliant on lengthy video inputs from respondents. Instead, online surveys or online communities, which combine text, image-based and short video tasks are a better option. To encourage participation, an app-based platform that is easy for respondents to download, access and engage with should be used.

With online research proving a feasible option for many types of project, it will be fascinating to see how the market for this develops in India.



The Dos and Don'ts of Online Research in India.

DO



DO use local language moderators who are able to understand the nuances of responses and probe accordingly.

DO check the device type and service provider to understand the level of tech savviness and any potential network or tech issues.

DO take a religion / culture neutral approach.

DON'T



DON'T design questions that use jargon or language that is hard to understand. Always try to use region / culture neutral language.

DON'T assume that any type of survey can be executed in high mobile penetration markets. You need to check the type of device and service providers to check bandwidth too.

DON'T ask questions regarding religion or political affinity that could be perceived to be intrusive.

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Online Research in Thailand



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With 51 million active social media users – that’s 67% of the total population and 82% of internet penetration - the growing potential for online research in Thailand cannot be ignored.

In a country where the prevailing culture means that people can be reluctant to share their opinions in a group setting, the anonymity of online research can be powerful. It provides an opportunity for people to freely communicate their point of view without the boundaries of social restriction, enabling us to dig deeper and explore sensitive topics in a setting where they feel most comfortable – their own home. That said, there are number of aspects to bear in mind to execute online market research in Thailand successfully.

The first is recruitment. The quality of online panels in Thailand can vary, so we’d recommend using pre-identified respondents for online projects, for example, sourcing them from a customer list, so you can ensure you’re reaching the right people. For complex categories such as durable products or if you need to reach people based on their brand preferences, we’d recommend that the process for pre-identifying respondents has both online and offline elements. Despite sometimes requiring additional investment,

the offline element is important in Thailand for recruiting qualified respondents that meet your criteria. In this instance, make sure you working with agency that has a relationship with one of the top-tier panel providers, and has the expertise to design a sophisticated screening questionnaire to ensure you're reaching the right profile of respondent. We'd also recommend developing enhanced offline quality control processes before the research starts, such as phoning each respondent to check they meet the desired criteria for your project.

The second thing to consider is to think about the goals of the project and whether online research will deliver against these. Whilst there are some projects that are better suited to face-to-face, there are others that lend themselves to online. One example is ad testing, particularly when you're looking to evaluate video ads. Exposure to online media in Thailand is much higher than to traditional media so taking part in an ad testing project at home or on a smartphone mimics the way that consumers behave, allowing us to conduct research in a real-life setting. Another typical and popular use case for online research in Thailand is customer satisfaction research especially in the retail and service industries. The benefit of using an online approach for this is that the research can be conducted immediately after the product or service is used, helping us to understand reactions in real-time, and guaranteeing greater accuracy.





When it comes to online quantitative research, it is vital that this is mobile optimised. The length of questionnaire should be such that it can easily be done on a smartphone - the penetration of active social media users on smartphone is 71% of the total population. This will ensure a higher response rate from the respondents.

For online qualitative research, there's a big opportunity to harness increased familiarity with the online tools adopted as a result of social distancing measures for digital depth interviews or online focus groups. We'd recommend using these tools over online communities or digital ethnographies in this market, where the fear "losing face" is likely to influence what respondents project about themselves in these environments.

Online research has great potential in this market and provides a useful alternative to face-to-face research in particular use cases such as ad testing and customer satisfaction. That said, offline recruitment is an important consideration for any online project to ensure maximum success.



The Dos and Don'ts of Online Research in Thailand.

DO



DO verify the respondent's identity to ensure they meet the desired criteria before commencing the research.

DO consider offline recruitment, particularly if the project is complicated in terms of the type of respondent you're trying to reach.

DO ensure that respondents are able to take part in the research on a smartphone.

DON'T



DON'T use a long questionnaire. The maximum length should be 10 minutes.

DON'T rely on an online panel alone for recruitment. If you do have to choose this route, make sure you devise an effective screener as an extra quality check.

DON'T underestimate the fieldwork timeline. Online research isn't always faster to complete than face-to-face interviews.

Conclusion

We hope you have found this guide useful. If you have any further questions about how best to set up your online research study for success, please don't hesitate to get in touch with us. Our local market experts are on hand to share their rich cultural understanding so you can find the best way of approaching your project.

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