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CHATBOTS FOR MARKET RESEARCH: WHAT IS AND ISN’T POSSIBLE – YET

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BOOK REVIEW: Hillbilly Elegy: A Memoir of a Family and Culture in Crisis shows how exploring cultural backgrounds can provide deep insights and can go well beyond traditional demographic analyses.

BOOK REVIEW: The Undoing Project: A Friendship That Changed Our Minds explores the personal relationship and research collaboration of Israeli psychologists Daniel Kahneman and Amos Tversky.

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A Season of Inspiration

Summer is a season of inspiration. Charles Bowden said, “Summertime is always the best of what might be.” Charles Dickens described summer as “the prime and vigour of the year.” Even William Shakespeare pondered if he could dare compare his beloved to a summer’s day.

Summer also is the perfect time for our latest issue of QRCA VIEWS magazine, fresh to your mailbox with ideas and techniques to inspire you in your business. Here’s what we have in store…

As featured on our cover, Dina Shulman’s Toolbox article explores some tools and techniques that are used by Hollywood and Broadway actors and writers to flesh out characters and develop story lines. She has found tidbits in how the entertainment industry approaches these topics that you can integrate into your research efforts. In Schools of Thought, David Lithwick enlightens us on the field of competitive intelligence, which he feels has a synergy with qualitative research that can allow a natural outlet for QRCs to expand their service offerings to clients.

Do you think that robots might take over your job one day? Conversely, do you feel immune from this potential threat? In Tech Talk, Paul Hudson shows how neither may be true—chatbot technology very well may render human research interviewers obsolete one day, but at the same time they open doors for new methodologies and tactics that qualitative researchers may use to expand their practice.

Many of us utilize qualitative research to help companies re-brand themselves, but what is a qualitative researcher to do when she wants to re-brand her own research practice? This is the situation Dana Boone found herself in, and in our Business Matters column she shares how she engaged clients and marketing peers in a qualitative approach to successfully re-brand her business.

We also have the second part of our interview with Dr. Clotaire Rapaille. In this installment of our Luminaries column, Dr. Rapaille shows us how to apply his theory of the Culture Code to better understand macro trends in politics and society in today’s multi-cultural world. For our Global column, Corette Haf conferred with 21 fellow qualitative research consultants in 12 different countries to come up with a review of “research blind spots” that can cause headaches if not anticipated and dealt with properly when conducting global research across cultures and languages.

In our second Toolbox article this issue, April Bell presents a framework she has used successfully that melds guidelines from two very different fields, Design Thinking and the Montessori Mindset. Ashleigh Williams examines the influence that Blacks in the USA have had on pop culture in our Trends column.

In Book Reviews, Susan Fader submits a pair of reviews of books that complement each other—both We Are Many, We Are One: Neo-Tribes and Tribal Analytics in 21st Century America and Hillbilly Elegy: A Memoir of a Family and Culture in Crisis explore new ways to segment and slice-and-dice populations into meaningful and relevant groups. Jennifer Larsen reviews Payoff: The Hidden Logic That Shapes Our Motivations, which takes a behavioral economics look at what truly motivates us. And Deanna Manfredi tells us about an ambitious book that takes on the friendship and collaboration of Daniel Kahneman and Amos Tversky, The Undoing Project: A Friendship That Changed Our Minds.

And be sure to catch our latest Podcast with John Seigel Boettner from Teen Press, which helps middle-school-aged kids learn the ins and outs of conducting interviews. Have a great—and inspiring—summer! ☀️
Keep the Quality in Qualitative

When we conduct primary research, our work is only as good as the source of our information, the respondents who choose to take part in our sessions. However, we see more and more postings looking for respondents on the Internet, often with very detailed specifications of what is needed to qualify for a particular study. Unfortunately, this can leave the door wide open for “cheaters and repeaters.” They know how to answer the questions needed to secure their spot in a study. Some of these participants may be very articulate and convincing, while others may be agreeable to any comments made around the table, never offering a unique thought. However, no matter how sharp or agreeable, neither can give you the information that you truly need to get from your actual targeted consumers.

Clearly, research will continue to use the Internet more frequently to help maintain the flow of qualified respondents we need to do our work. However, it’s up to us to make sure that our respondents meet the specifications we lay out with our clients. What steps do we need to take?

• Ask your recruiters for full details on how they plan to carry out your recruit:
  – Ask them what their policy is on reusing respondents. Does it fit with your expectations?
  – Are they maintaining a respondent database that includes past participation by date, client and topic? Can they tell you that they have never recruited a particular respondent for you or your client before?
  – If they plan to initially screen online, ask to get a copy of the questions they will use, for your approval. Make sure that the questions do not divulge key specifications needed to qualify.
  – Do they formally screen respondents, using your screener on the phone to verify that they qualify?
• Are your screeners written in such a way that the qualifying specifications are not obvious?
  – For example, if looking for coffee drinkers who drink 3 or more cups a day, ARE YOU ASKING: What beverages do you drink in a typical day? How many cups or glasses of each? NOT: Do you drink 3 or more cups of coffee a day?
• Are you using a self-administered re-screener (if at a facility) to catch potential cheaters or folks who just made an honest mistake but would add no value to your group?
• Are you providing feedback to your recruiter after the sessions? Certainly let them know if they did a good job. Also, let them know if there are any respondents they should remove from their databases because they were untruthful, disruptive or had other serious shortcomings.

By following these steps, you’re doing your part to keep quality in qualitative research and to help maintain qualitative as an important tool for our clients.
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Consider adding competitive intelligence (CI) to your research tool kit. Whether you conduct CI on your own or work with a CI specialist, the additional analysis can be fun and challenging, like working a jigsaw puzzle. For most buyers, CI courses and certification carry little weight. What counts is the level of detail, accuracy, industry experience, and measurable returns you bring to the study.

I define CI by focusing on the words themselves:

- “Competitive”—investigating competitor activities.
- “Intelligence”—using your expertise and intellect to analyze the data and make meaningful decisions with it.

It’s simple and intuitive. What matters is understanding the value of CI—filling information gaps that market research is unable to address.

As a CI practitioner for the past 30 years, I have had the opportunity to incorporate focus group discussions and B2B interviews into competitor research studies. I have also observed how qualitative researchers have adapted CI methods into their projects. The two methodologies fit well together.

How CI Got its Start

I imagine that CI has been around as long as market research. After all, buying your competitor’s product is nothing new. Manufacturers were doing this in the 19th century. What has changed is an increased number of applications of CI, speed of delivery, and level of analysis. And the advent of the Internet has certainly made CI more easily available for organizations.

CI’s real value, however, is providing primary intelligence (i.e. reaching out to people). This is where qualitative market research (QMR) providers have a leg up because they can apply research skills, discipline and experience to obtain competitive research, beyond simply going...
onto the Internet or sourcing competitor handout materials.

CI is used in many industries, but two where CI is used quite extensively are banking and pharmaceuticals. Banks use CI primarily as a benchmarking tool against competitors.

**Areas include:**
- Branch sales performance (e.g. how effectively financial advisors promote mutual funds)
- Call centre service delivery (e.g. how well call centre reps handle a customer complaint)
- Product offerings (e.g. what unique features competitor products offer)

Pharmaceuticals typically use CI when faced with a competitor threat or when planning to launch a new product. In the case of a competitor threat, pharma companies are confronted not only by other branded products but also by generics. In fact, once a generic enters the market, revenues for a branded product could very well tumble 75% or more. For example, in 2006, the cholesterol drug Lipitor reached $13 billion in annual sales, but since generics entered the market Lipitor annual sales are under $2 billion.

For those pharma companies planning to launch a product, CI is conducted to determine what counter strategies the competition will embrace to counter your client’s product launch.

**New Product Development.** While QMR is used to help develop new product concepts, CI will provide details on strategies the competition will embrace to counter your client’s product launch.

**Pricing.** While QMR provides insight into what customers deem a reasonable price, CI will unearth details of the competitor’s incentives, margins and pricing strategies to benchmark against.

**Commonalities between CI & QMR**

Three key commonalities between CI and QMR are:
1. Research skills (attention to detail, in-depth interviewing, synthesizing raw data and interpreting this information)
2. Smaller sample sizes
3. Accuracy based on credibility of respondents, depth of analysis, and the insights you bring to the analysis

**And Differences**

Where do CI and QMR differ?

**Information Sources.** Like all investigative methods, CI looks for clues, patterns and gaps. You need to persevere and even be a bit obsessive until you get the answers you are looking for. Consequently, CI necessitates reaching out to a greater mix of both primary and secondary sources such as:

- Primary: client’s sales force, client’s ad agency, customers, industry experts, competitors, government, associations, etc.
- Secondary: competitor sales literature, price lists, job listings, annual reports, industry reports, etc.

**Interviewing.** CI combines B2B interviewing with elicitation (i.e., going over the same discussion point again and again until you get information you require). In CI, while a survey is used to guide the conversation, not every question is asked. The CI interviewer first will gauge which questions a respondent seems most comfortable/knowledgeable to answer and then focus on these questions for the remainder of the discussion.

Clients often look for specific “pieces” of information they are missing. So, it’s better to direct your CI discussion to one or two critical questions and go deep on these vs. trying to nail every question.

**Analysis.** CI analysis is broken into five key steps:

- Set up: Develop a hypothesis.
- Incorporation: Read materials two, three or four times.

### Figure 1. Data cell mapping, bank client

<table>
<thead>
<tr>
<th>Customer Statements</th>
<th>Bank 1</th>
<th>Bank 2</th>
<th>Bank 3</th>
<th>Bank 4</th>
<th>Bank 5</th>
<th>Bank 6</th>
<th>Bank 7</th>
<th>Bank 8</th>
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</thead>
<tbody>
<tr>
<td>Savings Account</td>
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<td>Credit Card</td>
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<tr>
<td>Loans</td>
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<td>X</td>
</tr>
<tr>
<td>Mortgages</td>
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<td>X</td>
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<tr>
<td>Mutual Funds</td>
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<td>X</td>
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<tr>
<td>Term Deposit</td>
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<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Incubation: Assemble facts in various sequences until a logical pattern emerges.

Enlightenment: Study the data and reflect on which gaps to fill and questions to answer. Allow the real meaning to emerge.

Validation: Test your findings against your hypothesis.

Additionally, CI incorporates unique analytics such as data cell mapping and data verification to ensure findings are relevant, accurate and verifiable.

**Data Cell Mapping**

Let’s assume your bank client asks you to obtain copies of customer statements for eight competitors that cover seven products: savings accounts, credit cards, lines of credit, mortgages, loans, mutual funds and term deposit. But to obtain all these statements is beyond budget. You will need to identify which product(s) are a priority for each competitor. To do so:

1. Calculate the total # of possible cells (56 = 8 competitors x 7 products).
2. Of these, determine which to focus on. (Which banks are most innovative? Which products account for a majority of the client’s revenue?)
3. Narrow the number of cells to those critical to fill. In the example in Figure 1, there would be eight customer statements to source. The other 48 products are ruled out (low market share, not a direct competitor, laggard, etc.).

**Data Verification**

In this example, your wireless client asks you to determine the average number of mobile phones sold each week during the competitor’s launch. To be confident with your estimate, you will need intelligence from at least three sources. You decide that press releases, the competitor’s call centre and your client’s own tech support team are excellent sources. With the information you uncover as shown in Figure 2, you calculate that 38,000 to 50,000 phones are sold each week of the competitor’s launch.

**CI Is Not Spying**

Given the sensitivity of gathering information on the competitor, some clients will avoid conducting CI. They perceive CI as “spying.”

This is understandable, as CI does attract both ethical practitioners and those who misrepresent themselves. The latter will look for a quick fix to impress their client. So how do you convince hesitant clients that your efforts are ethical?

Begin by clarifying that CI is investigative research, which means it is “detective work,” not spying. Reassure your client that there are many approaches to conducting competitor research that are 100% above board, such as:

- Conduct follow-up focus groups with 1-on-1 interviews with participants who displayed in the discussion a keen understanding of the competition.
- Interview distributors and brokers at your client’s trade show booth for their insights about the competitor.
- Pay customers an honorarium for their opinions about the competitor.
- Use deductive problem solving. For example, through an Internet search, you discover that a potential competitor avoids markets < $100 million. Yet, your client’s total sales are $75 million. Hence, it is unlikely that this competitor will enter your client’s market.

**Conclusion**

I hope after reading this article you will have a better understanding of competitive intelligence and its value. I encourage you to expand your report analysis by including comments about competitors. The reason is simple: too often clients get their CI from their sales reps. Unfortunately, some reps have their own agenda, resulting in intelligence that is biased, inaccurate and/or incomplete.

CI tends to be a cottage industry. Suppliers tend to be CI analysts who previously worked on the client side, marketing consultants and market research consultants. This augurs well for QMR consultants and can lead you to more in-depth CI activities for your clients.
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RESEARCH
BLIND SPOTS:
UNDERSTANDING THE IMPACT OF CULTURE AND LITERACY LEVELS
Between 2015 and 2016, Europe experienced a humanitarian crisis with the largest influx of migrants and refugees since the fall of the Iron Curtain. Families, unaccompanied minors, women and men have undertaken treacherous journeys into Europe, towards Germany and Sweden in particular. Half of the refugees in 2015 were from Syria, Afghanistan, and Iraq. African migrants (such as Eritreans, Nigerians, and Somalis) have travelled the dangerous route from Libya to Italy. In 2015, a record 1.3 million migrants applied for asylum in the 28 member states of the European Union, Norway and Switzerland, with Germany receiving the highest number of asylum applications: 442,000 in 2015 alone (Eurostat, reported by the Pew Research Center, Aug. 2, 2016).

Towards the end of 2015, two of my QRCA colleagues—Susan Abbott from Canada and Ilka Kuhagen from Germany—presented a creativity workshop to qualitative researchers in South Africa. At the Johannesburg session, one of the attendees mentioned that some of the techniques covered may not work well among lower economic segments of our population due to limited literacy. His comment intrigued my two colleagues, both from developed countries. This incident made me think more consciously about the need to adapt the way we conduct grassroots research in my country and how this may be similar or different in other emerging countries.

Accordingly, I conferred with 21 fellow qualitative research consultants in 12 different countries. I focused on emerging economies, the BRICS siblings (Brazil, Russia, India, China and South Africa) but also included colleagues who specialize in multi-cultural research in the U.S. and Australia.

I was surprised to hear from colleagues in non-African countries, including those who attended my session about this topic at the 2017 QRCA Annual Conference, that they are seldom asked to research the lower end of their market. It is well documented that middle-class growth is exploding in emerging economies. This growth is likely to come from advancements up the consumer ladder. Is it wise to focus research on those who are already established middle class while neglecting the feeder market, the future middle class?

Lower-income segments can offer new growth opportunities for marketers only if they bother to understand these potential customers’ unmet needs. This is a win-win for marketers and the public, as better access to products and services uplifts these consumers and enables their advancement to middle class. But, we cannot assume that their needs and priorities are necessarily the same as the established middle class that forms the focus of most commissioned research. In some markets, there may be a huge HDTV dominating a home that may not have a refrigerator, a bathroom or even running water. In South Africa, we are used to the sight of satellite TV dishes on the rooftops in informal settlements. The cost of consumption is higher for these targets—they have fewer resources and less disposable income and must use these smartly. Every market is unique; there are great differences in the way consumers cook or do laundry across South America, Africa, Eastern Europe and Asia.
If we agree that it is important to understand the needs of lower income segments on their journey towards becoming emerging middle class, there are factors to consider to ensure that we truly hear and understand them. These include the impact of literacy levels and culture.

In some markets, literacy is a problem among the lower socio-economic groups due to attenuated or poor education. Their limited abstract conceptual skills impact the way moderators can engage with them, so complex stimuli don’t work. Their limited verbal skills and shortcomings in expressing their thoughts and feelings make written formats unusable.

In other markets, such as Russia and China, the regimes placed greater emphasis on education, so low literacy is not a factor. Russia has a literacy rate of 99.7%, while in China the literacy rate is 96%.

Language is crucial and has implications with regard to both culture and literacy. The level of English used in communication (such as discussion guides, concepts and test materials) needs to be simplified in many local languages. The vocabulary of many languages is not as granular as English. African vernacular languages, for example, don’t have separate words for love and like. Another example was provided by Pia Mollback-Verbic. In communication testing in India for a deodorant brand, the word “cleavage” was used. Pia said, “The Hindi translation is ‘a valley between two mountains.’ The moderator didn’t know how to correct the language into something more ‘culturally appropriate,’ and the poor consumers were mightily perplexed about the entire thing.”

One of the “cardinal sins” of global research is clients insisting that respondents be recruited who are fluent in English in non-English or multi-lingual countries. It is not realistic to ask for English-fluent consumers except in the highest socio-economic classes (including business-to-business) and depends on the target market and type of study. My South African colleague, Lesley Croskery, presented the findings of her research about this topic at the 2016 QRCA Worldwide Conference, which vividly illustrated the different quality of feedback, described by participants as “the inner me” versus “the deeper me” elicited when one frees a person to express themselves in their first language rather than insisting that they speak English. In the words of the late statesman Nelson Mandela, “If you talk to a man in a language he understands, that goes to his head. If you talk to him in his language, that goes to his heart.”

Dress is another important consideration for visiting research teams when they conduct research in certain markets. It is important to blend in with the target group you are researching by dressing modestly. Listen to your local partners if they suggest that you remove your jewelry or tone down your outfit. It is also necessary to respect the cultural norms of a society. Examples of this include cultures where women wearing trousers is frowned upon or where women are expected to cover their heads. If you don’t respect these norms you run the risk of offending your participants or being dismissed by a tribal leader, both of which will endanger the quality of engagement with your participants.

Comments from colleagues I interviewed reiterated insights from the presentation “Water Wows” by Piyul Mukherjee and Pia Mollback-Verbic. It illustrated why multi-country research design cannot be “one size fits all.” Although Piyul and Pia’s paper referred to Western versus Eastern culture, the principles they highlighted apply to other emerging markets as well. Differences between the individualistic society of the West vs. the collectivist society of most emerging markets must be understood and respected. People in the Third World are more gregarious and used to solving problems within the community rather than individually. The way people share their opinions differs. In Western culture,
direct questions will elicit direct answers. Criticism and scepticism are more easily expressed without holding back. In Eastern cultures and other emerging markets, questions are answered in an indirect, organic, roundabout way. People are inherently polite and, per their cultural norms, will not be critical to your face.

What are the practical implications of these literacy and culture factors when we conduct global research with lower income groups? What impact does literacy and culture have on the way we word and structure the discussion guide, the methodology we choose and the projective techniques we use?

**Time management** is very important, and it is wise to build in extra time. Allow more time for introductions and ice-breakers for respondents to feel comfortable and to build trust. Allow more time for each field event, as it simply takes longer to recruit than in Western cultures. In a group discussion, everyone wants to be heard, and the language may be more verbose so that it takes longer to express thoughts and feelings.

**Simplify** the discussion guide to its essentials, and make it clear what the “must have” information is. Simplify language by using words that are relevant and understandable to the culture. Modify exercises to something participants can relate to as relevant to their culture and traditions.

**Avoid or take care with written tasks** such as bubble drawings, sentence completion and letters. Scales and ratings are also tricky and easily misunderstood.

**Limit the number of concepts being tested**—too many can confuse consumers, especially if the differences between concepts are too subtle or too abstract. **Raji Bonala** recommended reducing the number of concepts tested per session, eliminating ones clearly not working, or rewriting language to be more meaningful to the culture.

**Which methods work best for these targets?** Many of the colleagues I interviewed in different parts of the world mentioned **ethnography** first when I asked this question. Ethnographic methods bring us closer to reality to observe actual behavior rather than relying on verbalization of reported behavior. Participants are more at ease in their own home with familiar objects and can express themselves better when they can “show and tell.” Ethnography is also ideal for clients to get firsthand exposure to the lifestyle and consumer behavior of target segments. Client teams should be kept as small as possible because a large entourage can be intimidating and impractical in small homes. **Nandi**

**Mswane** believes it feels more natural and less threatening to participants in South Africa when client observers also take part in the conversation, rather than acting like a silent jury.

When the cultures are more collectivistic and community oriented, friendship groups and paired interviews work very well. Respondents feel more comfortable in the presence of a friend, colleague or family member. The informal, relaxed chatting between them yields rich language and reveals true feelings and actions.

Cultural norms need to be considered when planning group discussions. In some cultures, it is unacceptable for younger people to speak before older people, so it is better to recruit a homogeneous age range in the same group. Groups in people’s own environment (e.g., township) may work better than in an upmarket facility. Ideal group size can differ from culture to culture. In India, smaller groups of six are ideal because participants tolerate multiple people talking at the same time.

**What about digital methods?** Do they work? This depends on consumers’ access to mobile devices versus computers, Internet penetration and data costs. For example, most digital platforms work well with China’s tech savvy participants.
**Mobile** works well in South America, Africa and India. Most people there have mobile phones, and smart phone ownership is rising rapidly with Android devices still more common than Apple iPhones. Often participants in South Africa and India already have WhatsApp on their phones. Their familiarity with WhatsApp can make it a better choice than traditional market research platforms and apps.

Many colleagues invite participants to reply by video rather than text. Some cultures (such as Brazil) like selfie videos. In India it may be more comfortable if someone, perhaps a family member, asks questions to the participant. Showing something by sharing a picture or video clip minimizes the need for too much text typing.

Which **projective techniques** work well to reveal richer insights for these lower socio-economic groups? Personification emerged as a favourite tool, but it is necessary to adapt the metaphor to be relevant to the specific culture. Brand party can work but needs to be adapted to social occasions relevant to the culture. In collectivistic societies, relationships are important and can offer rich metaphors: which of the brands in a category is the grandfather, the mother, the wealthy uncle, the naive child? With projective techniques, it is important to simplify the technique and adapt it to a situation that participants can relate to.

When using projective techniques, add visual stimuli like pictures, photos, mood boards or physical objects that help respondents express themselves and compensate for limited verbal skills.

Desleigh Dunnett shared a wonderful example with me of tactile ranking used in the Northern Territory of Australia (see Figure 1). Community members discuss social problems in their community and sort nuts into different sized heaps to indicate the prevalence and impact of different social problems in their community. This physical ranking activity goes hand-in-hand with much debate of which problems are greater than others and why, an enabling technique in the true sense of the word.

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“If you talk to a man in a language he understands, that goes to his head. If you talk to him in his language, that goes to his heart.” - Nelson Mandela
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Here is the second installment of our interview with Dr. Clotaire Rapaille, who wrote the New York Times best seller The Culture Code. In part one of the interview (QRCA VIEWS Spring 2017), Dr. Rapaille describes what the Culture Code is and how it can be applied to gain a deep understanding of consumers’ emotions based on their earliest experiences with a category. Here he describes how to apply the Code to gain a reading on people’s true needs in today’s multi-cultural world.

Kay: What are your thoughts on how to use the Culture Code to explain Donald Trump’s victory in the U.S. Presidential election?

CR: Trump triggered the reptilian brain, and the number one issue, very simply, is immigration. Why? It’s people breaking into your home and attacking your family and whatever the image is. Perception is reality here. We need somebody who will take us away from this place where we are invaded. Where is the Promised Land? Donald Trump says, “Let’s make America great again.” That’s the America we want to go to. That’s the Promised Land. And he says, “Follow me.” Why me? Okay. I’m crazy, this is clear, but follow me.

The structure is the message. The content is irrelevant. And what is the structure? “I am Moses! I’m going to take you to the Promised Land. I’m going to recreate America, and it’s going to be great again. We’re going to be respected in the world. We’re going to be feared. We’re not going to be apologizing to everyone.” His attitude is what made him president. “You beat me, and I’m going to beat you five times stronger back. You punch me; I punch you back three times, five times stronger.”

Suddenly, that’s what appeals to Americans. This is what we want. A lot of people have predicted that Trump is going to change. Well, I don’t think he’s going to change. His structure is so strong. And even today, people say, “Oh, he’s going to stop tweeting.” No, he’s not. It doesn’t matter. He is who he is. The big issue was just be yourself and you’re going to win. So that’s what makes him so strong.

Hillary, unfortunately, had too many advisors, and so it was difficult for her to be constant in one direction or another. And she was not Moses.

Kay: How do you reconcile globalization with the Code?

CR: There is a global code that is happening because there is a global tribe. I just wrote a book on this. The global tribe is what I call “the satellite tribe,” which is made up of people who are always on the move, always flying from one place to another, frequent flyers. They’re always benchmarking everything in the world, where are the best places to do this or that. They speak three different languages and have homes in three different parts of the world. These people are what the media
have recently come to call “the elite.” But they are out of touch with the real culture.

For the real people who live in the U.S. Midwest in Akron, Ohio, or Laredo, Texas, the culture code is becoming even stronger because these people see their culture as a refuge and something that is in danger. And when your culture is in danger, you’re ready to fight for it. This is what is happening in the U.S. and in England with Brexit. This is what is happening in Germany today. This is what is happening in France and around the world. Real everyday people today are saying, “Wow, I want to keep my identity. I want to be who I am. I want to connect with my deep emotional culture and my deep emotions.”

So what is happening with the Culture Code is the distance between these two groups is going to get bigger and bigger in the future. They are going to be more and more disconnected.

This is a very big issue because most of the time executives in big corporations are members of the global tribe. They are trying to sell to people who are deeply rooted in their own culture. So there is a disconnect. We see that in politics. We see that in many corporations.

**Kay:** How can marketers in the U.S. sell to newly arrived immigrants, because they come from such different backgrounds and cultures?

**CR:** If you risk your life to come to America, you want to stay. It’s a mistake to think immigrants want to bring their country with them. What they want is to become Americans. So why do they want to come here?

I’ve done work in southern California with successful Mexicans that come to the U.S. What do they want? They want to see the U.S. of their dreams. They want to send their kids to college. They want to own a car and a house. They’re disappointed when they see that America is not the America of their dreams.

Big corporations should reinforce that dimension, that when you come to America you want to become an American. They should give you possibilities through products and services to feel that you are more American. Especially after two or three generations, the kids want to be American.

I was born in France, and I’m an American today. My second boy was born in Los Angeles, and he speaks fluent English, French, and Spanish. I remember at a certain time, when he was a kid, I just wanted to make sure that he was speaking French. When he had friends around, he didn’t want to speak French because he didn’t want them to think that he was not an American. He wanted to be like the other kids—until one day when he became an adolescent, and he wanted to impress some girls when I was with him. He spoke French to me, to show them that he could speak French. So that was a change in his attitude. But at the very beginning, children want to be “in.” They want to be integrated.

**Kay:** So marketers in the U.S. should reinforce the codes that have to do with the dream, the American dream.

**CR:** Absolutely. It’s interesting how with even the choice of words, the people who defend immigration, call immigrants the “Dreamers.” And so you see? This is what is key here. And everybody is always arguing, “Oh, the American dream doesn’t exist anymore.” Well, then, even with the new government today—the dream still exists. We can make America great again.

**Kay:** Yeah. Knock on wood (laughter). Do you have any parting words that you’d like to share with VIEWS readers?

**CR:** Well, yes. I’m an American. I was born in France by accident; that was not by choice. But because I was born during the war [World War II], I saw Americans come and liberate France. I was born in 1941 under German occupation. When I saw the Americans arriving and giving me chocolate and chewing gum, and though I was a little kid, I said, “I want to be one of them one day.” And it took me a long time to get here—10 years of hard work to become an American citizen. But I’m proud of it. I think that big corporations and people who are Americans today, it’s time to be proud to be an American. The global world is looking at America. I read somewhere that we are supposed to be the last best hope for mankind. I know it’s kind of arrogant and pretentious, but I think there is a reality here. Around the world, people want to come to America. Let’s picture America as the country we want to have, the ideal dimension. We represent hope. We still are some kind of an ideal dream for many people around the world and so let’s make sure we don’t forget that.

**Kay:** Okay. Thank you so much, Dr. Rapaille. This has been a wonderful interview.

**CR:** Thank you so much. My pleasure.
After 10 years as a QRC, I began to wonder how relevant my brand identity was. There were numerous reasons to rebrand my practice. Most notably, my expertise and specialized skills had evolved over the years, and the qualitative landscape had changed dramatically. New approaches like digital methods, agile research, and behavioral economics were becoming more top-of-mind for clients. Simultaneously, I started to feel as though my brand identity was nothing more than a signature on proposals and presentation decks. I was concerned that my brand was not standing out in a meaningful way among my clientele.

Yet, as I considered rebranding my company, big concerns crept in. What if clients didn’t like my new approach? What if my new brand identity proved to be less memorable than my current? Would lapsed clients not recognize my brand? Would current clients fail to make the leap with me? Then, it hit me! I had all the right tools at my fingertips to engage my clients in the rebranding process and co-create a new brand identity with them. Hello, light bulb moment!
I had conducted co-creates in the past and knew they required a strong recruit and iterative process where stimuli could evolve and participants could lead the way. I knew how to do this. And, I had the perfect group of participants—clients who are experts in marketing, insights, and creative development. Not only would I gain the benefits of their expertise but also, simultaneously, I could enroll them in the acceptance of the new brand identity and drive awareness of the change. Check, check, check! My rebranding process had become a three-phased qualitative, co-create research project that I would conduct for myself. I was stoked!

**Phase 1: Exploration**

My three-phased approach started with a series of IDIs. This stage was focused on gaining a critical understanding of clients’ guardrails. These data became the inspiration for my new brand identity. I now understood what, if anything, was still relevant about my current brand. I also identified some new positioning territories that I believed my company could own.

I included a mix of clients—older and newer, more and less familiar with me, heavier and lighter digital qual users (my specialty area), and smaller and bigger brands and budgets. My recruiting approach was a personal email offering a $75 Amazon eGift card for a 30-minute phone interview. To my pleasant surprise, most clients refused the incentive. Twice as many clients accepted my offer of participation as I expected. Many local clients asked to meet in person for the interview. And a few clients whom I had assumed had gone “dark” asked to be involved in the process. Things were off to a reassuring start.

I began the interviews by exploring recent trends in qualitative research, especially changes that clients expected to continue going forward. That topic provided an objective context in which they could offer perspective on my brand. More specifically, it shifted them into a third-party mindset, enabling my brand and service offering to be evaluated against trends and competitors in a constructive, yet critical, way. This was incredibly enlightening and provided just the input I needed to build on. In the latter half of the interview, clients reacted to thought-starter branding elements—new ideas for positioning, a range of imagery to inspire new designs, and a draft description of the service offering. I made sure to explain that the stimuli provided were meant to inspire their feedback but not to limit it. Thus, they should feel free to “go outside the lines” if they would like.

Throughout the discussion, unconditional positive regard was critical to getting the open collaboration I craved. I was conscientious to not react to their feedback by explaining my thinking on where the brand could/should go. Resisting my “brand owner” tendencies was tough! Rather, I kept us both thinking about what they wanted and needed from an on-trend qualitative partner. On occasion, the feedback was harsh—one client outright did not like the new company name. A few other clients said the imagery options were ordinary and not motivating. But on the positive side, the positioning ideas shared seemed to be motivating to many clients. I was delighted to hear that, as these positioning ideas were an amalgamation of messaging that I had used over the years for different marketing materials of Slaughter Branding (the original brand of my company). That meant that my fundamental offering was still relevant. Whew!

Mission accomplished! My clients helped me shake down my brand and challenge my personal biases. And, I had successfully engaged 16 of them in this
Phase 1 Exploration in only two weeks time. After synthesizing the interview findings, I had what I needed to brief an agency … but who should I choose?

Phase 2: Ideation

Initially, I had not planned on extending the co-create process through the creative design phase. Yet, it occurred to me that the approach was still valid here, and collaborating with a creative agency that knew me well would have some key advantages. Basically, I thought of them as my “creative brand lovers,” well positioned to help me in the ideation phase of this rebranding initiative.

I knew from experience in doing co-creates that “brand lovers” tend to have the keenest sense of where a brand can stretch to credibility, and that was exactly the input that I needed. Further, another benefit of working with a “brand lover” agency was that they would have skin in the game, just like consumers who want to see their favorite brands succeed. This agency had a vested interest in making sure my new brand identity reflected the best of their talents since the “brand lovers” included in the brand identity options emerging from this phase of work. And that is just one example of several instinctive nuances that my “brand lover agency” included in the brand identity options emerging from this phase of work.

Over four weeks, we culled the designs down to four for validation, including one I had chosen from the cutting room floor. At that point, the ideation phase of my co-create rebranding process was complete.

Phase 3: Validation

I was now ready to check whether my new branding materials were playing back my clients’ guidance. For the validation phase, I designed a 10-minute quali-quant survey with two sample segments: my bullseye target of research buyers, plus a more general sample of market research and marketing industry professionals.

For survey stimuli, I included one new positioning concept with a brand tagline, four brand identity designs, and three options for a new service line articulation. I was careful to keep the scope of metrics limited to what was critical and to make the open-ends optional. I programmed and fielded this simple survey myself, sending it via email to 225 contacts and posting the link on my LinkedIn page. The incentive offer was three $100 Amazon eGift cards via random drawing. With high hopes, I set a stretch target of 50 completes and planned to send two reminders over two weeks to drive completes.

I was blown away by the response! Seventy-one contacts completed the survey, with 57 coming from my database email, resulting in a whopping 25% response rate for that sample. In other encouraging participation results, 9 out of 10 respondents answered all of the optional open-ends and there were only three partial completes. Further, the overall sample split beautifully into segments with 40% research buyers and 60% general industry, allowing me to do some directional comparisons between their results.

When it came to the survey results themselves, concept scores were very strong for “firm I want to hire” (77%) and for “uniqueness” (55%). There was also convergence on one of the four new brand identity designs with 50% of participants prioritizing it as their most preferred design among the options presented (interestingly, this was the design that I pulled off the agency’s cutting room floor on a hunch that it felt right based on the client interviews).

These survey results indicated that the direction I was taking in my rebrand initiative was indeed resonating with current and potential clients. They also pointed out some opportunities to strengthen uniqueness and emotional resonance for the strongest design and the positioning concept. There was still work to do, but overall, things were on track.

Going Forward & Looking Back

For the final design refinements, the creative agency made tweaks to bolster visceral appeal and the feeling of “energy.” Separately, I began working with a business coach to hone my brand purpose in hopes it could further improve the uniqueness of my positioning.
I had the perfect group of participants—clients who are experts in marketing, insights, and creative development. Not only would I gain the benefits of their expertise but also, simultaneously, I could enroll them in the acceptance of the new brand identity and drive awareness of the change.

I don’t think good marketers ever feel completely done with understanding how to best present a brand. To that end, I anticipate further improvements ahead, potentially reengaging some selected clients.

Looking back, I would absolutely co-create again. This approach to rebranding my company more than sufficiently addressed my major concerns of client acceptance and awareness. Mission accomplished!

Unexpectedly, I also gained some wonderful “Easter eggs” in this process that validated the viability of this new path for my company. Two lapsed clients were so energized by the process and my message that they both awarded me substantial projects. Other clients simply reminded me that they have regard for my work, which is always wonderful to hear! One verbatim that I keep on my wall today is, “The reasons I love working with [you] is custom solutions with immediate insights, super-personalized service, designing projects to meet our objectives and budget, but most importantly smart as a tack.” While I was not fishing for opportunities or compliments, they came as a natural result of exploring how and why we could work together in the future.

Maybe I could have taken the co-create process further, possibly crowd-sourcing the positioning and design from clients at the onset or simply adding another exploratory phase to better understand what clients want in an “ideal qualitative partner.” Net-net, I think two touchpoints before the agency briefing would have made the process even more successful.

As I look ahead, I’m considering how to keep clients engaged in a dialogue like this. They have energy and talent for developing great brands, and most said they enjoyed this “diversion” and the opportunity to have a tangible impact on something that mattered to them and benefitted us both. Perhaps they’ll help me co-create my first proprietary methodology under my new brand identity. Time will tell.

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Meryl Streep eloquently described the role of an actor at the 2017 Golden Globe Awards: “An actor’s only job is to enter the lives of people who are different from us and let you feel what that feels like.”

Does this sound familiar to you as a QRC? The parallels of our profession and theirs are vast. So what can we learn from our creative colleagues in entertainment? How do they develop characters and plots that ring true? What is their process, and what kind of research do they do? Marc Engel and I explored these questions through interviews with writers and actors (including many prominent award winners and nominees) and secondary research (podcasts, videos, articles and TV interviews). We also drew from our own theatrical background and training. We presented our findings at the 2017 QRCA Annual Conference.

Let me share with you a few tips from our work that you can leverage in your practices.

Ask the Right Questions

When developing stories, entertainment writers strive to create real characters and portray how they would respond in specific situations. As QRCs, we have similar goals in accessing the truth and understanding behavior. What specific questions need to be answered in order for stories to ring true? These five ques-
Design Tip:
Research — most of the time — gets at questions 1-4. When meaningful to our topic, add question 5. By adding question 5, the relationship factor, we include another perspective on the participant's behavior and beliefs, leading us closer to a comprehensive truth.

Design Tip:
While demographics are certainly an important factor in casting, it's lifestyle, personality traits and behaviors that convey the true essence of a character. Beyond the basic criteria, I suggest we try to include some of the writers’ five questions in the research screener:
- Emphasize lifestyle, personality and behavior traits.
- Example: Instead of just recruiting someone who frequents Starbucks 3-4 times a week, ask what the experience means to them. Is it just coffee on the go? Or is it an afternoon ritual that offers a precious break from the daily grind? Recruit one segment or more depending on your objectives.
- Use a focused articulation question (or two) to gain a more in-depth understanding. You will not over-recruit extroverts this way, and sometimes, as we know, the quiet ones offer the most insight.
- Example: “How would you approach solving X challenge?”
- Example: “In Y situation, what was your overall goal?”

Bonus Tip:
Let’s not forget our audience, the clients. Ask your clients these same questions during the kickoff meeting to gain a better understanding of their current situation. Think of the “character” as the client’s product, service or brand. In Question 5, “key relationships” would be the main clients involved as well as the company’s top competitors. What “they have to say” would refer to product reviews and brand perception.

Act Like a Detective, Psychologist and Historian
In theatre, playwrights write the script, and then actors study the script to further develop their character. My friend, Beth Malone, starred as Alison Bechdel on Broadway in the Tony Award winning musical *Fun Home* (she was also nominated for Best Actress). *Fun Home* is based on Bechdel’s graphic memoir of the same name. I asked Beth to describe her process in creating this role. She mentioned the five questions previously stated and then continued to describe a more intense research and analysis process. At times, she almost sounded like a qualitative researcher developing a persona:
“*You’re looking like a detective for clues, watching for tells. You’re not just looking at the content; you’re being a psychologist*...”
and a historian at the same time. What is she doing here? Why? What does she want us to see? How does a person who wants us to see that, think? You start with a thought and then behind the thought there are 17 other thoughts."

**Moderating Tip:**
Many of us may already ask similar questions, but do we ask “why” as many times?
- Do we ask until we can “connect all the dots”—without relying on assumptions?
- How do we deal with inconsistencies, like why would participants state one thing on the homework and contradict themselves during a group? How hard do we push to understand?
- What is not being said? The “spaces” between ideas and answers may tell an important story, so closely observe while moderating and employ projective exercises that may help tease out those spaces.
- How do you reconcile two people telling a different story about the same situation or each other? Do you know when to probe and when to just listen?

**Use Theatre Games to Build Trust Quickly**
The rehearsal period is vital in the creative process. During that time, actors study the script, explore character ideas and bond together as a cast. From middle school to Broadway, the first rehearsal often includes a theatre game as a warm-up. It can be as simple as passing an imaginary ball to one another while trying to maintain its size and shape.

**Moderating Tip:**
A pass-the-ball type of exercise is great for focus group warm-ups because it:
- Involves physical action, which helps people get out of their heads and use their creativity.
- Clearly demonstrates that there is no right or wrong.
- Requires the participants to work together, which creates group bonding (and if they feel a bit silly, even better!).

**Start with Story, not Theme**
Consider the show Hamilton. How did a musical about an often over-looked Founding Father who created the U.S. financial system become such a phenomenon? The creator, Lin Manuel Miranda, offers some advice: 

“Start with story, not theme. In chasing Hamilton’s story, it allowed me to write about all these other themes, because they are inherent in his life. If I had started with theme, I promise you, it would have been really boring.”

In musical theater, writers use an “I Want” song to introduce the main character and share the character’s deepest desires and to evoke empathy from the audience so they care enough about the character to want to follow its journey. Even Disney musicals incorporate the “I Want” song. For example, in The Little Mermaid, Ariel expresses her desire to experience life beyond her current home in the sea:

“I want more. I want to be where the people are. I want to see, want to see them dancing. Walking around on those, what do you call them…feet. Up where they walk, up where run, up where they stay all day in the sun, wandering free, wish I could be part of the world.”

**Reporting Tip:**
Incorporate this idea by sharing some of the participants’ emotional stories at the beginning of the report, using quotes, videos or photos. Consider embedding video on the cover page! The goal is to create enough interest so that our clients will want to hear the whole story (and not just read the Executive Summary).

**Reporting Tip:**
Adam Perlman, a writer on many popular TV shows, shared the challenges of writing a TV pilot. The amount of information that must be conveyed in a short period of time is enormous. In order to do so, each scene must accomplish all these tasks:
- Tell something about the character.
- Move the plot forward.
- Reveal something about the world of the show.

In the research report, make each PowerPoint slide represent a scene. If it doesn’t achieve the three tasks, cut it (or put in the Appendix, a luxury we QRCs have that writers don’t).

**Ready, Set, Action!**
Your (more) creative hat is there for you to use. I hope these tips add to your current practice and lead to stellar box office results! Who knows? You could have even more fun along the way, too!
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-Cory, Ministry of Culture

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Clients are looking for new ways to figure things out. They want something more than just a great PowerPoint at the end. Instead, they need a process to help them learn at a deeper level. Moving ideas forward within their organization is as important as discovery.

That’s why Design Thinking + a Montessori Mindset make a powerful combination. The two together offer not only a consistent way to think about how to design a project but also tools to help guide and create a space for teams to learn to love to learn.
Design Thinking  
**Phase 1: Empathize**

Design Thinking starts with empathy. No great product or service is made without a deep understanding of people’s needs, limitations, and desires. As researchers, we find this step in the Design Thinking process to be the most familiar. It’s what we do—we empathize to better understand the users’ needs and thinking.

When using empathy as a Design Thinker, we’re simply doing this activity to crack a window, shed some light, and find inspiration to move to the next step in the process. Empathy, especially in Design Thinking, must be seen in broad context. Some key questions to keep in mind during the empathy phase are:

1. **What’s the So What?** As you’re observing, learning, questioning, and listening, remind yourself to think about “what are we going to do with this information?” Empathizing is a means to an end.

2. **What’s the Right Question?** The deeper we peel back the layers of the onion on understanding our client’s pain point, the more freedom we give ourselves to discover.

3. **Whose Head Am I in?** It’s easy to write a discussion guide and ask those questions, but what separates true empathy from a mere list of questions is the ability to focus on the user/respondent/consumer and stay curious about them. The more we’re in their heads, the more ideas are sparked in ours.

**Phase 2: Define**

The define stage clarifies and reframes the learnings. While the empathize phase gives us a diverse collection of ideas and feelings, the define phase helps us reduce to the most important problem(s) to solve. As opposed to traditional research where a report of all the findings is delivered, this forces narrowing to the main insight to take action on. At this stage, you are not solving the problem; you’re simply clarifying what it is.

Knowing what information is worth defining is the challenge. Techniques that help us focus are:

- **Pre-create themes**—By grouping your ideas, you have a framework to organize your data as you go, and it’s easier to see patterns emerge. Sticky notes are your best friend here—use them!

- **Template a problem statement**—To help create an actionable statement, combine ideas to create a clear point of view that can be actioned against. For example, “User X … needs a way to Y… because surprisingly Z (insight).”

**Phase 3: Ideate**

Ideation is conducted in a lot of different ways. The main components are consistent, but the beauty of it is that it’s an art. It’s not just about facilitating or having the right tools or exercises; there is also an art in creating a space and structuring the session so that teams can form, be present, and be non-judgmental.

Here are some tips on how to achieve that when working with clients:

- **Create games**, which give people permission to be playful. This allows people to tap into their prefrontal cortex, which drives further ideas.

- **In-context participant experiences**. Immerse sub-teams into an environment the user experiences as a precursor to the ideation session. This gives them greater perspective on user needs.

- **Ideate on what to ideate with**. Be intentional regarding materials and stimuli used in the ideation to make it more robust. By doing this, you gain higher ownership, energy and ultimately, ideas from your participants.

**Phase 4: Prototype**

Prototyping can feel overwhelming because of our tendency to want to “get it right” the first time. In fact, the process of prototyping forces our brain to think in reverse. As humans, we feel a need to get it right and check a box, but an effective prototype allows us to get better feedback from the user/customer.

A prototype allows users to experience the idea instead of just reading or hearing about it, providing richer
insights. We get more meaningful direction when we move beyond the fear of not having the prototype “just right.”

During this phase, I’ll typically nudge my research client to think about the following when developing prototypes for testing to ensure better testing results:

• **Keep it simple.**
• **Think about what you want to learn,** not necessarily the perfect solution.
• **Isolate specific attributes or elements;** it helps you focus on what you want to learn from users/respondents rather than trying to solve for everything.
• **Build it to think.** This is the reverse way we typically think of creating something: usually, we think of an idea, then build it; here, building/creating something rudimentary helps move things forward.
• **Create artificial deadlines** to force bias toward action.

**Phase 5: Test**

Testing helps us learn even more about our respondents based on their reactions to our prototyped solutions. We need to **let go** of prototypes, physically and emotionally, so we don’t get in the way of the learning. We need to see how the customer uses and misuses it — the idea itself is less precious than the insights you learn.

Design Thinking helps us be more intentional in how we test by using these guidelines in the process:

• **Context:** Where will the testing be most effective? Is it best to be in a focus group room or in context of where the user would use it?

• **Definition:** What are the goals of your questions? Do you want to understand just initial reactions or also long-term behavior?

• **Tangible:** Can you allow users to react with more tangible prototypes to help them envision the experience (versus more superficial or incomplete feedback from “written prototype” concepts)?

**Montessori Mindsets**

The Design Thinking process is a great overlay to creating research that moves ideas into action more quickly. Additionally, the Montessori Mindset provides a great set of facilitation tools that help promote learning, personal ownership, and collaboration with the team.

In each of the five Design Thinking phases, I employ these four Montessori Mindset principles, as appropriate:

• **Pull, don’t push.** Montessori teachers call this the “art of drawing out.” They set up an environment where students learn without a lot of teacher intervention. As a facilitator, I want that same engagement from my client teams. By pre-designing learning templates and creating a space where the team walks in and knows how to engage, we pull them into the process.

• **Concrete before abstract.** This is the belief that students learn by starting with something they already know. Teachers use familiar physical elements and storytelling to begin a lesson. Presenting new concepts this way intrigues and builds connection. By starting with one concrete idea we want our audience to take away, it creates connection before moving into the more abstract concepts.

• **Structure that’s flexible.** Montessori teachers develop an overarching framework for the learning but create different materials for students to choose from, which creates a sense of freedom. In the same way, creating a research environment (specifically an ideation session) where there is a clear overarching structure, yet flexibility to independently choose tasks, creates better team engagement.

• **Observe before acting.** Observing the student allows the teacher to act based on the child’s specific need. They call it “following the child” and believe that a child knows what to do; their job is simply to facilitate them doing it. Over the years, I have continued to learn to sit back, observe, stay present, and act without judgment. Doing this creates a space where my teams relax and can be who they are, more open to learning and creating with others.

**Final Thoughts**

This discovery of using these two methods together has shifted my role from someone who needs to be in control of every aspect to more of a guide for my teams. When I follow this process in a way that pulls everyone in, I’ve discovered that I’m able to watch something incredible happen — people coming together to understand, learn, and create better.

And it’s fun to see teams honor the Golden Rule of creativity: treat other people’s creativity the way you would like them to treat yours!
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American pop culture often sets the tone of artistic innovation and triggers trends on the world stage, including music, fashion, social media, and the Hollywood film industry. Minorities in the U.S. are a part of this puzzle of influence and are not sitting on the sidelines, despite not always being credited for their origination and inspiration.

Blacks have a particularly undeniable influence in the dynamics of our nation’s folklore and our future. Black buying power is projected to reach $1.2 trillion this year and $1.4 trillion by 2020, per a report from the Selig Center for Economic Growth at The University of Georgia. This is a significant increase, reflecting approximately
275% growth since 1990, when it was just $320 billion. Any marketing campaign targeting Millennials “must include messages to reach African-American youth,” notes Nielsen in its October 2016 report, “Young, Connected and Black.”

But beyond their buying power, the Black community historically has displayed an inclination to be forward-thinking and innovative, having strong influences, and driving trends throughout the U.S. culture and beyond. From the roots of slavery and forced segregation in the U.S., unique trends and subcultures have developed within Black America. What is notable is that many American trends in music, dance, and fashion started underground in tight-knit Black communities before spreading mainstream.

Let’s take a closer look at some of these notable influences.

**Soul Food Staples**

Soul food, the cuisine that has been closely linked with Black culture, is metaphorically and intrinsically “made with love.” This cuisine evolved from Blacks combining traditional African tribal ingredients and techniques with western European and American preferences of the time. Dishes in this cuisine are widely regarded as rich, decadent, and wholesome.

Soul food has had a profound influence over Southern U.S. cuisine, as many dishes were created by Black cooks in the South. Notable recipes of this cuisine include cornbread, hushpuppies, yams, okra, and “greens” (turnip greens, collard greens, mustard greens, etc.), which celebrate the resourcefulness of Black cooks who used their rations, crops from their own gardens in slave quarters, and wild livestock they had hunted for their meals. Bountiful dishes like fried chicken, cakes, pies, and drinks (lemonade, sweet tea, and red drinks like fruit punch mixes) were added during the rise of sharecropping when resources became more plentiful.

During the Great Migration (1910-1970s, from the rural South to the urban North), Blacks were also influenced by cultures prevalent in the northern cities they migrated to. Cross-cultural dishes like macaroni, chili and spaghetti also became side-dish staples of Soul Food cuisine.

To this day, this Black-inspired cuisine has gone mainstream as traditional sides like macaroni and cheese and Brussels sprouts are now featured dishes in the trendiest of restaurants.
Music as a Reflection of Life

In music, Black culture is widely credited for the creation of R&B and hip hop/rap genres. With popular artists including Drake, Beyoncé, Rihanna, Chris Brown, Nicki Minaj, and Fifth Harmony, these genres are indeed some of the biggest contributions to music today. With origins from the disc jockey community on Black radio and in nightlife, hip hop and rap music have always reflected the daily life of Blacks in this country—from struggles to triumphs.

But in fact, Black culture’s impact on music dates all the way back to when Africans were brought to this country. African-American slaves on Southern plantations cultivated their own musical styles and vocal harmonies, which later evolved into gospel, blues, and what is now known as bluegrass and country music. Rhythmic drums and the use of instruments like the banjo can also be seen in the fabric of modern music genres that we know today.

Although no one can pinpoint the origins of jazz, it is known that it combines the deep-rooted musical traditions of Black New Orleans with the creative flexibility of the blues. Trumpeter and singer Louis Armstrong had such a big personality and enjoyed a long career; “What a Wonderful World” still plays at many weddings. Prior to Armstrong, ragtime and early jazz musicians like Tony Jackson and “Jelly Roll” Morton had unprecedented strengths in improvisation on the piano in the 1920s. For Jackson, some of his composed hits and his elegant look were copied by white artists of the time.

In the 1950s, rock n’ roll acts like Chuck Berry, Little Richard and “Big Boy” Crudup set the stage for mainstream non-Hispanic White (NHW) music acts like The Beatles and Elvis Presley. The 1960s brought Motown and the Detroit sound, which gave us classic Black artists like Stevie Wonder, Smokey Robinson and The Jackson 5, who set a gold standard for music with their popularity and crossover success.

Within the Black community, some hold feelings of resentment that Black artists have not been given due credit for spearheading these musical genres and sounds.

Even so, the proliferation of these sounds into the mainstream is one of many examples of how Black culture can cross over and be adapted by other cultures.

Fashion Statements

Unlike the relatively familiar influence of Black culture on music, fashion is a potentially overlooked category for Black contributions, many of which have become noted milestones in the fashion industry.

Fashion within Black culture began with church style in the South. Every Sunday, slaves would put on their “Sunday’s Best” for church service. It was a way for them to transform themselves from the hardships of their circumstances into “saints” who were ready to worship. This style spilled over to influence fashion across the entire region by Black seamstresses who created fashions for Whites with embellishments and grandeur.

This influence continued into the 1940s and ’50s with the work of the first African American haute couture fashion designer, Ann Lowe, who is best known for her one-of-a-kind designs, including Jackie Kennedy’s elaborate wedding gown, an exquisite example of Southern-style fashion at its very best.

Historically, Black fashion has also had a political undertone or essence of rebellion, from black leather outfits and natural afro hairstyles in the 1970s to the baggy garb of the Gangsta hip hop movement in the 1990s. Today, Black fashion continues to make a political statement within the Black Lives Matter (BLM) movement.

Black youth can be seen wearing BLM-inspired “I Can’t Breathe” t-shirts with hoodies from 2010 onward.

In addition, Black-owned businesses appeal not only to Blacks when it comes to developing a personal style but also have cross-cultural influence. Beats by Dre wireless headphones, Air Jordan shoes, and Sean John clothing and footwear are just a few Black celebrity-inspired brands that have made waves in the mainstream market. Self-proclaimed “sneakerheads” are an established group of shoe intuitivists and today span all cultural backgrounds. Oprah Winfrey’s annual list of “Favorite Things” continues to influence her fans each holiday season as her once-televised items are now unveiled in her magazine and in a special section of Amazon.com.

Black culture has also helped to open a social dialogue around what’s considered “beautiful” in relation to body image. As Black culture and fashion gain further representation and influence, depictions of voluptuous bodies have become more widely accepted. Noted for their curvy yet muscular body structure, celebrities like Beyoncé, Jennifer Hudson and Serena Williams are trailblazers in their own rights, and they have helped to shape these new trends for body image, providing a platform for this social acceptance alongside other female Hollywood counterparts.

Moving to the Beat

Finally, dance is deeply engrained in Black culture and has been a universal language that strongly resonates outside of the Black community. Social dance in Black culture has a rich history that dates
back 200 years; it was a way for slaves to unify and communicate past various African languages and to express an inner sense of freedom under captivity while keeping African traditions alive.

Some of the first well-known dances from the 1930s include the Charleston, developed by small Black communities in Charleston, South Carolina, and the Lindy Hop. At the start of the Great Migration, these dances continued to be performed by Blacks who moved to urban cities, becoming a cornerstone of the Harlem Renaissance.

Blacks also helped to create/contribute to new genres of dance that we know today as tap, jazz, modern, and hip hop dancing. Jazz dancing originated from the African-American vernacular dances of the late 1800s to the mid-1900s. Pioneers like Katherine Dunham, a Black anthropologist, dancer, and choreographer, fabricated traditional Caribbean and Brazilian dances into a performing art form.

Even today, social dance is a heightened indicator of community-belonging — if you know the steps you are identified as part of a community. Dances like the Hustle and the Electric Slide of the 1970s and ‘80s brought people together regardless of the region they were from.

Social dances often stem from regional popularity among Blacks (like “Footwork” and “DLow Shuffle” in Chicago or the “Dab” and “Nae Nae” in Atlanta), yet many of these dance moves are gaining national adoption after surfacing from underground groups and being intentionally referenced by Black artists.

Acknowledgment

Based on future projections, Blacks will continue to be trendsetters in U.S. society. Because Blacks are younger on average, they are trendsetters and tastemakers for young consumers of all races, according to the Selig Center. Blacks will continue to set important precedents in mainstream culture and wield immense influence over how Americans choose to spend their money.

Pepper Miller and Herb Kemp, co-authors of What’s Black About It? Insights to Increase Your Share of a Changing African-American Market, note that Black consumers are “more likely than non-Hispanic Whites to be among the first to set new trends and to consider themselves on the cutting edge,” and they nod to the group’s willingness to switch from previous brands they’ve been using to try something new.

Blacks don’t just set trends in a vacuum; they are influenced by the cultures with which they interact. In the culinary space, Blacks are continuously influenced by other cultures, adapting other ingredients and dishes into their menus and giving them their own flavor. In addition, Black youth are far more likely than non-Hispanic Whites to be influenced by Latin/Hispanic music genres.

Furthermore, within the current sphere of influence, there are feelings of mistrust and animosity in the Black community when ideas or behaviors go mainstream and become "gentrified," without a trace of representation or credit back to Black culture. An example of this phenomenon is Neiman Marcus’ $66 collard greens at Thanksgiving, traditionally a working-man’s dish from the South, which Blacks perceived to be stripped of its cultural context due to its luxurious price tag. Another example is dances like the “Nae Nae” casually performed outside of its geographically Southern context. While Black culture invites others to partake in its cultural contributions, it also desires acknowledgment.

Being natural trendsetters positions Blacks as agents of change and influence for brands seeking ambassadors for new products and “up and coming” lifestyle innovations. Because of the Black community’s impactful and influential nature, marketers should consider looking to this group to help their brands emerge from a smaller underground context to mainstream pop culture.

In harnessing trends from Black culture, we as marketers and researchers can be more aware of the increasing need to depict cultural context — in some way connecting the products back to Black people or their history as a sign of admiration, respect, and our cultural sensitivity. Qualitative research can provide a more informed perspective for marketers and brands to create future strategies that acknowledge Black history and influence, especially when it comes to representing products that are directly influenced by Black Americans and their ancestors. Together, we can wrap our arms around this history and uncover the relevance of these ties through qualitative research.
Chatbots for Market Research: What Is & Isn’t Possible - Yet

By Paul Hudson
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So imagine a world where all of your research can be managed by bots. An equal mix of awe and fear wells up inside of you! It sounds like a nirvana of efficiency and quality but is also a disarmingly scary prospect without the need for specialist agencies and moderators.

Qualitative research is already benefitting from online tools and natural language analysis, which enable us to improve the operational efficiency of qual activities and analysis of the subsequent data. The act of moderation, however, still marks qualitative research as a uniquely human experience. “Real qual,” as opposed to gathering a large volume of quotes, needs intelligent human moderation. A human moderator will get to the heart of the issue. Via reciprocal exchanges, considered probing and a sample size set to accommodate the required conversational depth, they will reveal the “why” behind the “what.”

A chatbot has the potential to change all this. In this brave new world, a chatbot of human intelligence is harnessed to moderate a “real qual” discussion with tens, hundreds and maybe thousands of people; feed it a topic guide and off it goes!

But is it possible?

The Human Competition

For a chatbot to be as good as a human qual moderator, it needs to be able to interact with a participant in the same way. So, let’s look at how our chatbot needs to be designed.

**REAL TIME GROUP DISCUSSION**

- Move 1: The moderator asks a question.
- Move 2: Participant 1 responds to the moderator.
- Move 3: Participant 2 responds to participant 1.
- Move 4: Participant 3 agrees with participant 2.
- Move 5: Moderator probes for further information or asks a follow-up question.
- Move 6: Participant 4 makes an unrelated point.

**ASYNCHRONOUS ONLINE DISCUSSION**

- Move 1: The moderator asks a question.
- Move 2: Participant 1 responds to the moderator.
- Move 3: Participant 2 responds to the moderator.
- Move 4: Participant 3 responds to the moderator.
- Move 5: Participant 3 responds to participant 2.
- Move 6: Participant 4 responds to the moderator.

In the real-time group discussion you can see there are three things that the moderator has to do: 1) prompt and probe for further information beyond the initial answer, 2) encourage discussion between participants and 3) keep participants on track. In the asynchronous online discussion, the moderator’s role is slightly simpler and more linear: they have to ask questions and then prompt for further clarification where there are opportunities to dig deeper.

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**RULE-BASED PATTERN RECOGNISING CHATBOTS**

**ELIZA**

ELIZA is an early natural language processing computer program created in the 1960s at the MIT Artificial Intelligence Laboratory to demonstrate the superficiality of communication between man and machine. Her interaction was based on pre-programmed scripts. You can talk to ELIZA here: cyberpsych.org/eliza

**PARRY**

PARRY was written in 1972 by psychiatrist Kenneth Colby, then at Stanford University. PARRY attempted to simulate a person with paranoid schizophrenia. The program implemented a crude model of the behaviour of a person with paranoid schizophrenia based on judgments about conceptualizations: accept, reject, neutral. PARRY was described as “ELIZA with attitude.” PARRY is not available for online conversation due to incompatible code.

**A.L.I.C.E.**

Developed in 1995, A.L.I.C.E. (Artificial Linguistic Internet Computer Entity) is a more advanced rule-based, pattern recognising bot. She engages in a conversation with a human by applying heuristic pattern-matching rules to the human’s input. However, even the casual user will often expose her mechanistic aspects in short conversations. You can talk to A.L.I.C.E. here: alice.pandorabots.com
Different Chatbots, Different Capabilities

There are two principal types of chatbots, although in reality boxing them up in this way is purely for illustrative purposes since it is an evolving field.

The first is the rule-based, pattern recognising bot. These include the historic early chatbots, named ELIZA (1966) and PARRY (1972). More recent notable programs include A.L.I.C.E. These chatbots are designed to recognize key words or phrases that are compiled in a series of database fields. This essentially programs the bot to respond in a human-like way to tailored situations. In this way, people have created a series of different ‘A.L.I.C.E.Bots’ for a range of scenarios.

We experimented with an A.L.I.C.E. bot about smartphone behaviour. We created a short topic guide for a bulletin board focus group and a database of questions that A.L.I.C.E. could use. The result was a very stunted and short-lived discussion. While the bot could elicit an initial response in an asynchronous task, it would struggle to generate much discussion or dig beyond the initial answer.

Still, this experiment demonstrated that a qualitative researcher could be able to elicit some decent quotes from a sizeable sample size using this method. A chatbot of this type could easily be programmed to manage response rates during asynchronous reflective questioning. Programmed with required parameters for completion, delays and incentive levels, it could send email reminders (see Figure 1).

More recently, a second type of bot has been developed that can learn and evolve in the way they respond, becoming more context sensitive. For example, Cleverbot learns new responses based on real-time user interactions rather than being driven from a static database. The advances of these context-based learning bots have caused the recent boom in the number of chatbots being launched.

These bots may be more successful for market research as they are able to learn and adapt their responses over time—just like real moderators. This form of chatbot could be used to moderate a linear asynchronous discussion. The chatbot would still need to be fed a topic guide, but it would learn when to prompt within certain parameters and also learn which style of emails get the best response (see Figure 2).

Fortunately for us, a human moderator would still be required to ensure the project objectives are met. And bots with that kind of focus have limited application because you need to design a specific bot for every single topic/context, to allow it to learn, adapt and improve. In practice, this would mean that you need to develop hundreds of bots, as every project will have a slightly different context.

In the current explosion, chatbots are successful because they operate within a very tightly defined context. For example, the automated service bot on a bank’s website is designed to work only for that particular brand and its products. It can respond to your questions because they can be predicted through historic analysis of inquiries and FAQ pages.

INTERACTING WITH BANKING CUSTOMER SERVICE

- Move 1: The customer asks a brand specific banking product question.
- Move 2: The agent responds with an answer.
- Move 3: The customer asks a follow-on question.
- Move 4: The agent responds with an answer.
- Move 5: The agent checks for satisfaction and closes.

This is the critical difference between how our research moderator bot needs to work in comparison to a customer service bot; the customer service bot only needs to recognize patterns of similar questions and identify a range of possible answers.

This style of interaction is very different from the dialogue of a research moderator. The moderator starts from a defined point, which can be programmed but very quickly needs to adapt to ask further questions depending on the answers given and on what other participants also say, which requires a different level of skill. It requires logic and sapience. This form

These bots may be more successful for market research as they are able to learn and adapt their responses over time—just like real moderators.
of Artificial Intelligence (AI) simply doesn’t exist in the chatbot world. Yet.

The Chatbot of Tomorrow

For a chatbot to truly play the full role of a moderator requires a more advanced design than those currently available, a “third generation” of intelligence, or “strong” Artificial Intelligence, as it is known in technical terms. A bot of this type needs wisdom and reasoning beyond a topic guide. This reasoning would allow it to respond to answers and follow up with questions intuitively, learning to order prompts and gauge what further information might be available to meet the project objectives.

The perfect, human-being-impersonating chatbot may not yet be available, but it will be.

It is only when you get a chatbot with true reasoning capability that an online real-time discussion could be moderated. Creating a chatbot to moderate a real-time one-to-one interview will happen first because the chatbot isn’t managing ‘sideways’ discussion between participants. Rather, it is able to assess how well the answers are meeting the objectives and respond in a conversational manner.

Real-time group moderation requires the most superior style of chatbot, one that can learn, reason and also manage multiple interactions at the same time, know when to encourage discussion, when to keep it on topic and when to shut it down to focus on specific answers or points (see Figures 3 & 4).

Preparing for the Future

At the moment, it would seem that the moderator’s role is safe from robots. While some forms of qual are beginning to be automated, the role of ‘real qual’ (at least the ‘real qual’ element of moderating discussion) remains a uniquely human skill. There is, however, an immediate opportunity for bots to help us automate the more mundane elements of qual research—checking for completion, sending reminders and gathering ‘mass qualitative’ evidence in the form of quotes from thousands of people.

In the medium term there is the exciting possibility that chatbots will be able to prompt and moderate asynchronous online discussions. At this point, the role of the moderator changes significantly—still needed, but in more of a supervisory, management capacity. This is also the point where true ‘mass qual’ becomes possible as we go beyond gathering quotes to moderating basic discussions at scale with hundreds of participants.

In the long term, real-time in-depth discussion and moderation will be possible using research chatbots. At present the technology isn’t available to do this, but it is only a matter of years.

The future for qual is exciting. In preparation, we need to be mindful of where human skill adds true value and where robots and automation can help us achieve more. We will have more options for qual research, not fewer, so we need to learn and adapt to a more varied and dynamic field.
QRCA continues to conduct and record interviews with thought leaders in the qualitative research industry. These podcasts shed light on subjects of great interest to those whose work involves qualitative research.

In the latest episode, QRCA VIEWS Podcast Editor Mike Carlon interviews John Seigel Boettner from Teen Press. Started at Santa Barbara Middle School, Teen Press helps middle-school-aged kids learn the ins and outs of conducting interviews.

The story of Teen Press is unique. John is a film buff and often uses film as a teaching aid. Years ago, when the Santa Barbara International Film Festival was coming to town, John wanted to give his students a chance to talk to some influential filmmakers, so he helped them apply for press credentials and taught them some interviewing skills. But one important lesson he impressed upon his fledgling journalists was to go beyond the questions that Hollywood types get asked all the time: Who are you wearing? What’s your relationship status? What’s it like working with so and so? Instead, he wanted his kids to uncover what these people are like as human beings. And that’s why, at one red carpet event, they handed Amy Adams a burrito!

John and some of his former students presented at the QRCA Annual Conference in January where they inspired attendees with their unique approach to interviewing celebrities on the red carpet. We hope you enjoy the interview; listen at podcast.qrca.org.

Check Out Our Newest Podcast with JOHN SEIGEL BOETTNER from Teen Press

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If you think about it, life runs on motivation more than on any other fuel out there. But have you ever thought about what motivates you to do the things you do? What motivates you to wake up early on a rainy day and go to work? Is it the paycheck? Hopefully, for most of us, the answer is “No, my work means more to me than that.” But it's not always clear what motivates us or how we can more effectively motivate others.

In *Payoff: The Hidden Logic That Shapes Our Motivations*, Dan Ariely, best-selling author and professor of Psychology & Behavioral Economics at Duke University, examines what motivation is, what motivates us, and how we often act on misperceptions of motivation, negatively impacting productivity. This short book utilizes his typical conversational approach and, like other TED books, is a quick read. There are even cartoons along the way to humorously illustrate key points. Ariely revisits some experiments and examples from his previous work but also utilizes some new learning to keep things interesting for his fans.

Each chapter acts like a parable, weaving together pop culture references, anecdotes and experiments to support a primary “moral.” A couple of the chapters really got the qualitative researcher in me thinking:

- **We place a high value on our ideas and creations and can derive meaning from that alone, without any external rewards.** Our ideas and creations are worth more to us simply because we made them, regardless of their objective merit. Ariely talks about the advent of Duff boxed cake mixes in the 1940s. At first, the mixes prioritized ease, with the user only needing to add water, but they weren't selling. Duff came to realize that the women baking the cakes wanted to be more involved in the process so they could “own” the creation. As soon as Duff added more steps, requiring the user to add eggs and milk, the mixes began flying off the shelves. Nike and Reebok are brands that are using this insight, allowing consumers to customize their sneakers. When a consumer can make a product personal, creating a sense of ownership, they develop a greater affinity for the brand, creating a long-term relationship.

- **Elements that make up a good relationship can be more motivating than money (even in a “typical” employment situation).** Money, in the absence of relationship building, can even be a detriment to motivation. The typical workplace operates under the assumption that employees work for a paycheck. However, Ariely shows us that elements that make up a good relationship, such as a well-placed compliment, can often garner more long-term gain than more expensive monetary bonuses alone. This is an important thing to remember in all areas of business but especially as a qualitative research provider. As we all know, in order to avoid the commoditization of qualitative research, we should avoid a transactional approach and build a relationship with our clients. We truly maximize our perceived value when we can partner with our clients and show that we prioritize them and the needs of their brand over “selling” a particular project or methodology. And this learning definitely extends to brands. American Express is a brand that has been doing this well for many years. Its customers see this credit card company, seemingly more than any other, as a trusted ally that has their back, earning strong customer loyalty (and an annual fee). If you can read only one chapter in this book, I would recommend this one—Chapter 2.

I could write my own short book on the thinking this 100-page book sparked for me, but I will say, as with much of Ariely’s work, I am already finding myself thinking about these insights as I go about my life and my work. I know this is a book that I will reference often, and the chapter-by-chapter lessons make revisiting certain learnings an easy task. I truly believe we can all benefit from thinking more about the motivations and misperceptions under which we all operate, both in our professional and personal lives, and this book is an excellent catalyst.
It is human nature to want to sort things into distinct groups. In fact, noticing the similarities and differences among different objects and learning to group like with like plays a very important role in a toddler’s cognitive development. In market research, figuring out the best way to segment people based on specific criteria plays a vital role in helping to understand what these people think, how they behave and what they will do. But grouping people into like groups is much more complicated than a toddler’s challenge of grouping objects by shape. And is the common way of segmenting people by age, education, income and attitude towards a brand really the best way to group?

Not really says John Zogby, who has been doing political polling for decades in both the U.S. and other countries. In his book, *We Are Many, We Are One: Neo-Tribes and Tribal Analytics in 21st Century America*, Zogby presents an in-depth discussion of his thesis of Tribal Analytics, which segments people by how they see themselves and with whom they chose to identify. Zogby feels that “self-identified tribal affinities—shared values, life philosophies and outlooks…transcends demographics and other category-specific attitudes and behaviors, which would be the basis of a traditional market segmentation study.”

Zogby’s approach has identified 11 “tribes” that make up modern America, and he discusses each in depth using both hard data and anecdotal stories. Zogby was very careful not to cast any tribe in a more positive or negative light than another group. However, you could tell he had some fun coming up with the tribal names—Go With the Flow, Happy Hedonists, God Squad, Persistents, Adventurists, Self-Perfectionists, Land of the Free, One True Path, Outsiders, Dutiful, and Creators. Despite how some of these groups may overlap in a number of demographic areas, Zogby shows that how they self-identify may transcend those similarities. Zogby provides details on what the tribes have in common and what sets them apart and, more importantly, the characteristics that align a person with a specific tribe.

The charts and tables were very helpful in visually conveying a wealth of information. In one of the tables, he shows how each of the 11 tribes voted in the 2008 election. It might be interesting for Zogby to do a follow-up to see how the 11 tribes broke out in the 2016 election.

It probably would have been helpful if Zogby had included the methodology information in the up-front introduction rather than in the appendix since it was very helpful in understanding how Zogby developed his Neo-Tribe hypothesis. I advise reading the appendix right after you read the introduction.

While *We Are Many, We Are One: Neo-Tribes and Tribal Analytics* could also have used some better editing, it is still an important read for anyone in the market research or political communities or for anyone who wants to have a better understanding of how Americans perceive themselves and which specific attitudes and behaviors are key in determining how Americans process information and see the world around them. Zogby’s book will probably make readers step back and reevaluate how they approach demographic grouping of the U.S. population. This book also will help marketers better tailor their messages to consumers because it identifies key attitudinal touch points that are important to different groups.
J. D. Vance’s *Hillbilly Elegy* is not the typical type of book that QRCA VIEWS magazine usually reviews. It is a very engaging memoir written by a then 31-year-old Marine (there is no such thing as a former Marine—one is always a Marine) who is also a Yale Law School graduate. Vance grew up in Rust Belt Ohio and spent some of his childhood at his family hometown of Jackson in Appalachia Kentucky.

So why review? This book pairs very well with the John Zogby’s *We Are Many, We Are One: Neo-Tribes and Tribal Analytics*, which is also reviewed in this issue of QRCA VIEWS. Both of these books are strong arguments, from radically different approaches, for reframing how we currently think about the people we want to talk with and how we develop demographic profiles to recruit against when recruiting for market research studies. Zogby’s *We Are Many, We Are One* takes the hard data approach and is more encompassing in that it breaks out the entire U.S. population into 11 distinct tribes. Vance’s wonderfully written *Hillbilly Elegy* is a more focused and personal story of a sub-segment of one of these tribes—the poor, white, non-college-educated folks living in the Rust Belt.

The glimpse into Vance’s world of siblings, extended family, neighbors, his mother’s many husbands and boyfriends, and all of their struggles—some self-imposed and others beyond their control—gives insight into how their worldview and behaviors are being shaped. In his story of a road rage episode, Vance shows the reader that behaviors and ways of thinking can be so embedded that it can be very hard to disengage a certain view of how the world works and how you should react and behave, even after your economic circumstances are improved and you are working at an investment firm in San Francisco.

*Hillbilly Elegy* is part history lesson—what Appalachian white life was like before and during the migration to Midwest factory jobs in the mid 1900s—and part sociology—how loss of jobs has affected this population. But most of all, it is the interesting story of the world Vance grew up in, his relationship to his grandmother, Mamaw, and how she was his lifeline to escaping this world of downward mobility where many have lost hope for a better life.

Vance’s ability to tell a story, coupled with the relevance of this particular demographic, makes *Hillbilly Elegy* an important read. Vance’s use of personal stories set in this world constantly reinforce John Zogby’s tribal thesis that people’s personal experiences and the group to which they feel they belong sometimes be more relevant in helping us to understand how they think and make decisions than the traditional demographic approach used by many in market research.

*Hillbilly Elegy*’s ability to provide a multi-layered view of a particular world serves up a lesson to market researchers that we need to better understand the world of the people we engage with and, to that end, we may want to explore other memoirs and stories of other demographic groups.
I was intrigued when I first heard that Michael Lewis, the highly successful author of such film-worthy books as *The Blind Side*, *Moneyball*, and *The Big Short*, would be taking on the friendship and collaboration of Daniel Kahneman and Amos Tversky as his next project. I had studied with Kahneman, who always preferred to be called Danny, at Princeton in the early 1990s and heard Tversky speak at numerous conferences and guest lectures. I had high hopes that Lewis would weave a compelling tale of brilliant minds and highly divergent personalities; Amos was famously outgoing, confident and confrontational while Danny was introspective, thoughtful and full of self-doubt. I was not disappointed.

Lewis starts off saying that he had never heard of Kahneman and Tversky until the behavioral economist Richard Thaler pointed out in a book review that the theory behind *Moneyball*, i.e., that expert judgment is less reliable than algorithms, had been articulated years earlier by a pair of Israeli psychologists. Intrigued, Lewis dug into the lives of these two fascinating characters and quickly discovered he had the makings of another book. (Thaler’s own book, *Misbehaving*, *The Making of Behavioral Science*, which was reviewed in the Summer 2016 issue of QRCA VIEWS, tells the story of how he and others built on the work of Kahneman and Tversky to create the field of behavioral economics.)

While the narrative of *The Undoing Project* is most concerned with telling the personal stories of these two men and their complex relationship, it also is generously laced with examples of their work that remain pertinent to marketing and market research. Up until Kahneman and Tversky’s work, economists assumed that humans were rational when making judgments, but Kahneman and Tversky showed that humans routinely ignore base rates, jump to conclusions and, above all, tell stories. When it makes judgments, the human mind replaces the laws of chance with rules of thumb that Kahneman and Tversky called “heuristics.” Many years later, Kahneman would come to call the heuristics-using part of the mind “System 1” and the logic-using part “System 2.” The existence of these heuristics means that human judgment is routinely distorted by the memorable and not ruled by logic.

About halfway through, the book takes a narrative detour into the Yom Kippur War, since Kahneman and Tversky both returned to Israel from the United States in 1973 to fight in that war. The war also served as a punctuation mark to their work on judgment. After the war, Tversky declared, “We’re finished with judgment. Let’s do decision making.”

The title of the book, *The Undoing Project*, refers to the last bit of work Kahneman and Tversky were collaborating on prior to a personal and professional falling out that occurred shortly before Tversky was diagnosed with metastatic melanoma at the age of 59 in 1996. That work posed the question, when an unfortunate event occurs, how do people “undo it,” i.e., what could have occurred differently for the event to have been avoided? They set out to define “the rules of undoing” and, in so doing, established their final heuristic—the simulation heuristic.

Five years after Tversky’s death, Kahneman won the Nobel Prize for their work. Kahneman was the first psychologist to win the Nobel Prize in Economics. The Nobel is not awarded posthumously, so Kahneman accepted it alone but read his eulogy to Tversky in his acceptance speech. And so ends the story of how an unlikely friendship, as the subtitle of Lewis’s book articulates, changed our minds.

For anyone with even a casual interest in behavioral economics, this book provides an excellent history of how these two men developed and tested the concepts as well as how they differed from the theoretical status quo. Even for those with no interest in behavioral economics, the book is still a beautifully written story of two brilliant men and their complicated friendship that may, like so many Lewis books, find its way to the silver screen.
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