Five Balls to Juggle When Going Solo

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GLOBAL

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BOOK REVIEW: Multicultural Intelligence: Eight Make-or-Break Rules for Marketing to Race, Ethnicity, and Sexual Orientation offers an excellent two-part insight into the world of multicultural marketing and communication so that marketers can understand the history and dynamics of multicultural intelligence and then know how to leverage that intelligence.

BOOK REVIEW: The Complete Guide to Writing Questionnaires: How to Get Better Information for Better Decisions should be read by anyone involved in market research, because no matter how experienced you are, this book will show you better ways to frame questions and provide answer options.

BOOK REVIEW: Todd Davis’s Get Better: 15 Proven Practices to Build Effective Relationships at Work, and Daniel M. Cable’s Alive at Work: The Neuroscience of Helping Your People Love What They Do both explore how to have a happier and productive work life.

BOOK REVIEW: David Aaker’s Creating Signature Stories: Strategic Messaging that Persuades, Energizes and Inspires will help you craft your own signature story to differentiate yourself from your competitors.

FROM THE EDITOR-IN-CHIEF

FROM THE PRESIDENT

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ALL THE WORLD’S A STAGE — RESEARCHERS AND PARTICIPANTS ARE MERELY PLAYERS

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Taking Risks and Exploring Roles

Welcome risk takers. In our cover story, Michael Carlon talks frankly about starting over after an unexpected job loss just before Christmas. Surprised when his business soared, he reflects on the actions he took that generated success. Mike epitomizes the curious and creative qualitative researcher—a way of being that comes naturally to many QRCs.

The creative theme continues with Dr. John Whittle’s delightful tale of what happens when researchers treat participants as actors playing multiple roles. In his Schools of Thought article, John shares techniques and ways to set the stage for participants so that they share both their public and private faces with us. Author Tom Rigby asks his participants to play roles, film their offices, and narrate brand stories. His Toolbox article is jammed with evocative techniques to use before and in-session, online or face to face. Kate Dennis looks at proven ways to encourage business people to speak from their hearts as well as from their professional roles. Her article explores ways to structure your research to get business participants to think and share emotionally from the start of your interviews. Together, these three articles celebrate the diverse ways creative researchers elicit meaningful insights.

Toolbox authors Ilka Kuhagen and Nina Stolle show how to leverage an engaging topic to recruit without paying incentives. Ilka’s and Nina’s approach is rich with learnings on how to attract and engage participants—much of it relevant even if your research topic is on the dry side.

For those of you who (like me) just wish it were all easier, dive into Robin Maurice Wedewer’s Tech Talk article showcasing business apps to drive efficiency. I immediately checked out all the apps and signed up for Grammarly, an app that points out grammar issues even when I’m typing outside of a Word or email application.

In college, I studied Russian and still dream of traveling there. Now, thanks to Marina Ponedelkova and her description of Russia’s cultural nuances and generous respondents, I want to run projects there as well. But if travel is out, virtual and augmented reality is very much in. In his Trends article, David Bauer lays out how virtual reality is evolving and how qualitative researchers are incorporating it into their work now.

Our book review section kicks off with Janet Standen’s fascinating discussion of David Morse’s Multicultural Intelligence: Eight Make-or-Break Rules for Marketing to Race, Ethnicity and Sexual Orientation. In her review, Janet explores some of the complexity US marketers face when deciding how best to communicate with prospective consumers.

Susan Fader builds a convincing case that David Harris’ book The Complete Guide to Writing Questionnaires will help both qualitative and quantitative researchers better frame questions and structure their research. Susan follows with a review of David Aaker’s Creating Signature Stories: Strategic Messaging That Persuades, Energizes and Inspires. Susan’s synopsis inspired me to purchase the book and to think more deeply about how the research I design can better support my client’s signature stories.

Finishing on two upbeat notes, Pat Sabena reviewed two books that show us how to have happier and more productive working relationships. Get Better by Todd Davis offers clear practices to improve relationships and Alive at Work by Daniel Cable shows how we can help others (and ourselves) be fully engaged in what we for a living.

Happy reading and best wishes for an adventurous, delightful summer.
Sometimes your research takes you to markets with limited resources, where efficiency and effectiveness seem impossible. That’s where our Pop-Up services work best. We handle setting up your non-traditional facility, tackle recruitment and provide hosting with remote monitoring and videostreaming capabilities. We’re your middle-of-nowhere support. And best of all, you don’t get burned.

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Making QRCA More Inclusive

QRCA started as an association exclusively for independent researchers—no clients allowed. The feeling was that members would feel more comfortable talking to their colleagues when clients weren’t present—for example, they could be open about things they didn’t know or approaches that hadn’t worked for them and therefore have greater learning opportunities.

But things have changed over the years. Many qualitative researchers work in-house at client companies. Qualitative researchers also work at advertising agencies (which we also considered client companies), as well as at new types of companies, such as digital agencies and companies that specialize in user experience. We’ve learned that those in-house qualitative researchers are dealing with many of the same challenges that we face, and would welcome the opportunity to join our ranks. Not only that, they have different experiences and perspectives that we at QRCA may be missing.

The QRCA Board of Directors took all of the above into account, and after careful consideration, we decided to remove the restrictions that excluded those who work in-house at client companies and those who work at ad agencies from membership. Now, membership is open to anyone who is involved in qualitative research.

Of course, it’s extremely important to us to preserve QRCA’s unique culture. It is the openness and sharing that make our association so special. The board is working on that in a variety of ways, among them an onboarding process that will ensure new members understand our special culture.

There are ways both existing members and those who join us can help. If you’re a new member or considering joining, understand that our gatherings focus on education. Selling and networking happens, but a “soft sell” works much better than a “hard sell.” At our conferences, if you’re a member who also offers support services to other moderators, limit overt selling to the exhibit hall. If a fellow member talks about a problem that you can help with, of course, you can let them know... just avoid the hard sell.

If you’re an existing member, you may be encountering more fellow members who are potential clients. Of course, many of us have been hiring fellow members for years, so this shouldn’t be new. But please remember that the “soft sell” rules apply here, too. No one wants to come to a conference to be inundated by people thrusting their cards at them asking to be hired as a moderator... just like those of us who moderate don’t want to be inundated by those providing support services.

Our new membership criteria will give us the opportunity to broaden our horizons and keep us up-to-date on all the newest trends in qualitative research. I believe this change will reinvigorate our association and make it even better than before!
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EvErything you Want to Know about Qualitative research in Russia

How Candid Are Russian Respondents?

Foreign clients often ask if Russian participants will openly criticize things presented to them. Fortunately, openness and sincerity are part of the character of Russian people. When they dislike something, they say so. We suspect that their reasons for honesty and sincerity—at work or in personal relationships—are founded on the Christian background of Russian values and on 70 years of Soviet history. Marina Nefedova of Insight & Planning of Kellogg Rus LLC, agrees that “Russian residents are never embarrassed to voice their sincere opinions on the tested ideas, even if that opinion is fully negative.”

How Patient Are Russian Respondents?

When focus groups are being conducted, it sometimes happens that they last longer than planned because additional questions or ideas develop. Many foreign partners and clients watching groups behind the mirror are sure that when the official duration of the group interview occurs, respondents will just stand up and leave the focus room. This rarely, if ever, happens in Russia. Patience and endurance are traits traditionally valued in Russia. Training and development of these traits are quite typical in many aspects of Russian life (e.g., its educational system). Tatyana Seferova, Qualitative Research

When coming to a different country (especially for the first time) researchers may have questions, concerns, and even stereotypes they need to ask about in order to feel comfortable and to gain the deepest insights for their projects. In writing this article, I have enlisted verbatim opinions from foreign and local partners, as well as clients, to highlight the scope and credibility of the Russian research experience.
Director of Brif in Kazakhstan (the biggest former Soviet republic) notes that such innate politeness comes from long-standing guest-host traditions. She says, “At the latent level, coming to a focus group discussion is similar to visiting… the moderator is perceived as a host, so respondents show their respect by answering all additional questions and staying longer.”

Of course, as moderators we try not to abuse this politeness. Seferova adds, “Not all respondents are that patient. A well-balanced guide—a good combination of direct questions, projective techniques and visual materials—is critical for vivid discussion. It is very important that respondents are not bored in the group; when people are really bored they are not very patient.”

Another factor that undermines patience is when materials tested are too numerous and not reader friendly; respondents can lose enthusiasm and stay in the group just to be polite. It should be noted that patience does not mean indifference. In cases of injustice, Russians react promptly, protest, and are not patient.

Nefedova notes an emerging trend for valuing one's time, especially in a big city like Moscow with a faster pace of life. She concedes, “Respondents will not stand up and go away, but they might mention that the official discussion time is over.”

How Well-Traveled Are Russians Outside of Russia?

As part of the warm-up for group discussion we sometimes ask respondents to say a few words about their vacations and countries they particularly like while traveling. People here are eager and curious to discover other countries. Many people in Russia are broad-minded and well educated; they want to see for themselves the things they read about, whether pieces of art, lifestyles, or the beauties of nature of other countries. One of the reasons we use travel as a common warm-up exercise in Russia is that participants often evaluate a product or concept by referencing examples of similar things they have seen while traveling.

What Are the Logistics of Conducting Qualitative Research in Russia?

Carolyn Chmielewski, a Lead User Researcher of BlaBlaCar, based in Paris, France, has considerable experience conducting research projects in Russia. She emphasizes the relevance of detailed explanations of all project organizational aspects: “We often need help understanding simple logistical things related to recruitment. What are the salary ranges that we should expect to recruit? What are representative cities to recruit from? What is an appropriate incentive? Will people be willing to invite us into their homes? Will people accept being filmed?” Chmielewski appreciates when the local research agency provides additional useful information for market understanding including store brands, family structure, and holiday information, so that we “were able to understand what our interviewees were talking about more quickly.”

Martin Swanson, Senior Consultant of Ears&Eyes GmbH, Germany, knows, “It is important to keep in mind that Russia’s capital of Moscow is different from smaller provincial cities in lifestyles, attitudes, and levels of income.”

We at Market Profile are often asked by foreign clients to offer research in a “typical...
regional Russian city. But Russia is very big and embraces many ethnic groups, each with different cultural traditions. We should always take into consideration the region that is the focus of attention: Central Russia, the Urals, the South, Siberia, etc. Furthermore, the various options of cities range from towns of less than half a million people and a few hours drive by car from Moscow to big dynamic cities such as Yekaterinburg, the capital of the Urals.

In many regions of Russia, including rather small towns, there are focus rooms with one-way mirror setups or other technical solutions such as video link and online web-streaming of the interviews or groups.

Preparing and sharing relevant market overviews is very beneficial for the project since clients get an opportunity to learn something new before coming to Russia. This is a win-win situation: clients are more aware and better informed when the interviews or focus groups start, resulting in a more productive flow.

Swanson further advises, “In case it is needed to test any products during the groups it is better to transport these yourself when travelling to Russia.” If this is not possible, then products should be shipped to Russia far in advance as customs procedures can be difficult and erratic, especially if sending test materials via postal services, “so plan a long time and make sure to have all the right papers.”

What Qualitative Methodologies Are Trending in Russia?

We see a constant demand for “old school” qualitative research methods, such as focus groups, in-depth interviews, and in-home interviews. Clients continue to value these screenshots of customers (lifestyle, perceptions of products, services, brands). Chmielewski contends that by using

the same methodologies across different countries, researchers can see how the motivations and expectations of the Russian people are shaped by their unique historical and cultural experiences.

Online qualitative research methods actively compete with old school offline research methods. Offline and online methods sometimes create good synergy and complement each other. For example, Swanson cites success of “classic focus groups with pre-online diary for exploration of usage experience.” Seferova agrees that online research methods are developing, but emphasizes that “they have limitations due to uneven Internet penetration, which varies a lot depending on the size of the city or town and the age group of respondents.”

The growing relevance of social media research in Russia is in line with the constant development of the online space in the life of consumers. Irina Mamaeva, Senior Analyst Market Research, Europe/India/Africa of Amway enthuses, “Now we sometimes use WhatsApp to collect feedback about our products from respondents in a prompt way. It is effective and very fast. We also can conduct new product tests with support of WhatsApp. All participants of the test are invited to the WhatsApp group created by us, and we can spend two to three weeks with them while they are testing new products such as vitamins or skin care.”

Olga Rybakova, Director of Market Research Center of Socium, Yekaterinburg, spoke to the trend to visit Russian consumers at home. “There is growing demand for ethnographic research, especially in-home visits. The market has become much more saturated than it used to be, so now manufacturers are targeting very specific audiences. Quite often standard socio-demographic recruitment criteria are complemented by psychographic criteria. To stay in line with the developing world of consumer manufacturers, we need to get information not only on verbal behavior but also to witness real life. That’s why ethnographic research is so relevant today.” Chmielewski further observes, “We found that spending time with the local ethnographer/moderator and translator was also an incredibly valuable part of our experience; we knew so little of the general cultural and historical context that they were able to provide important information that helped us understand what we observed in the interviews and home visits. For example, we were unaware of the historical context of the
dacha (country house with a plot of land that many Russian families have in addition to the apartment house in the city) before visiting. The local team was able to explain the cultural significance of the dacha to us, so that when our interviewees spoke about it, we were able to better understand what it meant to them.

Mamaeva adds important commentary related to in-home visits organized in Russia: “When it is relevant to interview a respondent in the kitchen, we should take into consideration the fact that standard kitchens of a Russian family with average income are usually small and separate, not united with the living room. So this can imply limitations to the number of visitors interviewing the respondent at his or her place.” Market Profile contends there is always a solution. If a kitchen is small, the company recommends that researchers visit the kitchen first, ask the respondent to point out everything important, and then move to a different room where all visitors can be accommodated. Project nuances and the number of visitors should be agreed upon in advance.

Swanson notes, “Making store checks by visiting the places of purchases mentioned in focus groups or interviews are also very important in order to understand different product channels and visit them before or after the groups to really grasp consumer preferences of shops.” Nefedova also emphasizes the relevance of accompanied visits to stores together with respondents “to observe selection and purchase, and to ask consumers questions on this very recent shopping experience.”

An important trend is the desire of manufacturers’ representatives to ask questions of respondents directly at the in-depth interviews or in-home visits, sometimes with the help of the translator or with trained in-house moderators who conduct focus groups on a regular basis and—resort to the services of research agencies only to work out or fine-tune research instruments (screeners, guides) and recruit respondents. The reasons for this trend are the high value of constant and active dialogue with consumers developing a bond with them, and the personal experience of listening to consumer language, needs, and challenges in order to promptly respond to them through the activities of the company.

Another feature of this trend is workshop sessions as part of qualitative research projects. These workshops are often conducted midstream or at the end of the consumer research. Whether comprising manufacturers only or mixed with consumers, such workshops give every opportunity to promptly process and implement research conclusions after active discussion with customers. Chmielewski fully supports this point, “Yes! Nothing is better for creating real empathy than the client seeing the real experience of the consumer with their own eyes!”

Furthermore, Swanson points out that there is a trend towards agile/ flexible research methods, especially labs: where the stimulus is quickly fine-tuned after one or two focus groups, and then the improved material is tested in following groups. Strong collaboration between designers, marketing, research agency, and communication agency is required.” Adds Chmielewski, “The trend towards agile development highlights exactly why it is so important for clients to be present and on the ground for fieldwork. It’s crucial to have information as fast as possible, and for everyone to be involved in the creative process. We’re moving away from sharing detailed research reports and towards a process that includes active research involvement as part of the creative brainstorming cycle.”

Conclusions

Foreign clients conducting business in Russia continue to find in-person interviews and ethnographies helpful in understanding how the country’s history and cultures inform Russians’ behaviors. Manufacturing companies are taking this a step further by pairing their manufacturers’ representatives with moderators, translators, or respondents, with an intent to deepen their empathy with these consumers. Meanwhile, Russia’s honest and polite consumers help to make for enjoyable in-country research experiences.
Surprise Attack

In December of 2016, while in the middle of conducting 48 IDIs for my former company’s largest qualitative client, I was given the news that as of the end of January, my services would no longer be required at the firm in which I held the title of Partner. The termination of my employment was positioned as a lever that had to be pulled to get the business back on track; nothing personal, just business. The date was significant, December 8—one day after Pearl Harbor Day—and I felt as if I was hit by a surprise attack. Finishing the remaining interviews was a difficult task after hearing the news, and facing the holidays with the uncertainty as to what was to come was a tremendous weight on my shoulders. I am embarrassed to admit it, but I held off on telling my wife the news until January as she has a host of health issues and I didn’t want an anxiety attack to put her in the hospital as we prepared to celebrate the Christmas holidays.

I wish that I could tell you I had some master plan about what I was going to do but the truth is, I didn’t. Fortunately, I never dissolved the LLC I started when I was first out on my own as an independent moderator. So, I reached out to some of my old clients letting them know my news. (Note, I do not want you to think that I was poaching my former employer’s clients. When I joined that company, we agreed to a list of clients not covered by the firm’s non-compete). After talking to those clients, something interesting happened—I started to get business.

February rolled around and I landed a project helping a beer company illuminate lovers of one of its core brands. At the same time, I landed a project with a razor company helping them understand male shopping behaviors at club stores. A project for a company that makes pet care products followed and then one for a company that makes...
car wash products, one for a snack foods company, and one for a sparkling water challenger brand. The list goes on. Before I knew it, I had billed more as an independent moderator in the first three quarters of the year than I had as a full-time employee at my former firm.

What Happened?
It begs the question, what happened? As a qualitative researcher, curiosity is in my blood; I wanted to know why these clients were more willing to work with me as an independent moderator but not when I worked for a larger firm. As I had these curiosity conversations with my clients, the answer was consistent and went something like this, “We know that we are getting you.” The reality of working in a publicly traded firm is that in order to maintain the heavy workload that comes with chasing profits, certain critical functions get offloaded to others on staff. An overworked (and underappreciated) project management team writes the screener and manages the field, a junior level staffer may take the first pass at a discussion guide, and someone else often writes the first draft of a report. When I was independent, I would do it all—but the standard operating procedures of my former firm, and my own workload, made that impossible. After going back on my own, my clients admitted that they did not like this way of working and felt as if I abandoned them somehow during the process. Once I was freed of the rigidity of my former employer’s standard operating procedures, the people I worked with in the past were much more interested in working with me once again.

I’d be foolish to think that simply becoming more intimate with project management was the only factor contributing to the success of my business; it wasn’t. I also decided to align my business alongside a hot trend in the research business, mobile.

Capitalizing on Trends
Interestingly, the buzz in my former firm around mobile had been about it being a better way of conducting quantitative research, yet I saw it as a solution to bringing efficiency to traditionally inefficient qualitative methods including in-home interviews and shop-alongs. Using in-person interviewing for both of those research methods means spending a limited amount of time with a small number of people every day. Furthermore, I always questioned how much “real life” we actually saw in an in-home, considering that when we were at someone’s house the kids were typically at school (or sent elsewhere), the house was almost always spotless, and participants often seemed nervous answering personal questions with a handful of strangers in their home (not to mention the one pointing a video camera at them). I started having people capture certain elements of their lives on their mobile phone and then following up with them in a one-on-one interview conducted online by webcam. Doing so removed geography as a limitation and allowed me to interview more people for any given ethnography or shop-along project.

While I was back to being more intimately involved in every aspect of a project and offering a new service that my clients saw value in, there’s a final element that was received with excitement—a better approach to reporting.

A Focus on Storytelling
Growing up, I was fortunate to have great teachers who instilled in me the importance of good writing. As qualitative researchers, writing comes with the territory as the ability to clearly summarize largely unstructured output is half the job. Outside of the qualitative industry, I’m also a novelist and currently have six books in print with a seventh on the way. Taking a page out of my approach to writing fiction, I’ve started to view reports not simply as regurgitations of findings, but as organic documents with storylines. Participants become characters, key findings become plot points, and recommendations become resolutions. When paired with a well-outlined video edit (something I offer in house to keep costs down and provide as a value-added service) a storytelling approach to qualitative research is something that helps me stand out from competition. I didn’t have the time to do all of this at my former employer—but as an independent moderator, nothing was holding me back from taking the time to craft better reports.

As I reflect on this journey, I’ve identified five levers you can consider pulling to become a better resource for your clients and growing your business:
I learned how to design in WordPress vs. paying an agency and when I wanted to launch a podcast to showcase my interviewing skills (without having to share client work), I took the time to learn how to do it. Taking the time to invest in your skills, particularly where you have a passion, will pay dividends.

**Embrace agility.** Many of us qualitative consultants are self-employed, which means we can operate with a high degree of agility. There are no internal hurdles that we have to leap in order to get a project into field; no “not invented here” syndromes are holding us back. Instead of focusing on products to sell, we can align the right methods to a client’s business problem without fear of reprisal from management. As independent business owners, we are only limited by our own creativity which, as qualitative professionals, we have a great deal of.

**Identify strategic partners.** As Clint Eastwood’s Dirty Harry said, “A man’s got to know his limitations.” I know that I cannot do absolutely everything in-house, so I’ve put together some strategic partnerships with like-minded individuals who offer products and services that complement mine. I have a go-to partner who developed a killer mobile app for qualitative research. I have turned to innovative recruiters who have found a way to do the impossible: reduce recruiting costs while speeding up recruiting timelines and improving respondent quality. Importantly, my partners are all people who are entrepreneurs themselves and can empathize with certain business issues I face from time to time (i.e. they are open to flexible payment terms when cash flow is tight). Find the right partners, approach them with your story, and blaze some new trails together—life’s more fun when you have someone to work with.

The shock I felt in December of 2016 after being let go from a secure job started to subside after I began having success as an independent researcher. I know that the decision to let me go wasn’t an easy one for management to make and that, at the end of the day, it was just a matter of numbers. That said, my best friend’s mother had a license plate on her car that simply read SITBR. When I asked her what it meant she looked me in the eye, smiled, and said, “Success is the best revenge.” I won’t share why that was so important to her that she had a personalized license plate made with that acronym, but I will never forget the look of satisfaction in her face when she said those words.

I hope that these levers are useful to you as you map out where you want to take your own businesses. If you have some to add, join the conversation on the QRCA Forum under Business Issues & Opportunities where we will start a thread called “Levers to Pull.”
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The challenge is that the array of mobile and desktop apps out there is dizzying. There are more than 1.2 million mobile apps in the Apple store, with 60,000 added each month. Even if only a fraction of those is business-related, it’s still too many to scan through to find the one that will work for your business. That’s before we even start counting the online tools without mobile versions.

With all the goodies available, it’s easy to go app-crazy. Many are free—at least to start. Those $2.99 monthly charges seem harmless enough until you begin piling them on. Calculate fees for multiple apps by 12 months and they suddenly begin to look like a significant business expense.

The limitations of budget—and time—mean we must be smart consumers. My approach to apps is to go slowly, onboard one at a time so I can explore all the features, try the free version and then upgrade to a premium version if the added bells and whistles seem worth it or I am using the app to the point where I exceed the free usage level. If the app is particularly involved or if the real value of the app is in customizing how it is used, then I’ll kick into student mode and scour online tutorials, including YouTube videos and the many excellent Lynda training videos that are
available free through many local library digital services. I became an Evernote ninja this way and have a public notebook of Evernote learning resources you can view at https://www.evernote.com/pub/rwedewer/evernote. (USE REDIRECTS?)

Here are some of my favorites apps, along with some suggested alternatives.

**CREATE AND TRACK PROPOSALS**

**Proposify (Proposify.biz)**

With Proposify you can create and deliver professional-looking, branded online proposals using one of the Proposify design templates or by customizing your design. You can see when projects are viewed by clients, track won projects in your pipeline and use the online signature tool to get fast authorization for your project. Add standard pages, such as individual or company profile pages, to your proposal library so you can assemble proposals quickly. Customizable fee tables allow you to offer clients add-on options with adjustable quantities, both of which update pricing with the tick of a box. Service level options include a branded URL and integration with Stripe, a payment system that allows you to request and receive payments in 135 currencies.

**Available:** Online and downloadable app.

**Cost:** Plans start at $25 per month.

**PandaDoc (pandadoc.com)**

PandaDoc has limited design templates but is an excellent choice if you design proposals in other programs. You can upload them to PandaDoc and add the app’s bells and whistles to your current process. It also integrates with Salesforce, Insightly, Stripe, Box, Dropbox and Google Drive, among others.

**Available:** Online and downloadable app.

**Cost:** Plans start at $19 per month.

**SCHEDULE CALLS AND INTERVIEWS**

**Timetrade (Timetrade.com)**

In my B2B work, I usually schedule in-depth interviews myself. The back-and-forth emails to find mutually agreeable times was a huge waste of time. And there was always the potential for error in calculating time zone differences in different parts of the world. I was giddy when a consultant friend turned me on to Timetrade online appointment scheduling. Log in, connect your calendar and identify times and days that you are available. Send emails through Timetrade alerting people of your availability or get a link to share or publish on your website. Timetrade automatically calculates time zones, syncs with most calendar systems, sends email appointment confirmations and reminders the day before the call. People can click on a link in the confirmation email to cancel or reschedule.

**Available:** Online.

**Cost:** Timetrade offers four editions, including one for individuals and another for multiusers, starting at $49 per year.

**Calendly (Calendly.com)**

Calendly offers similar features, although the rules for identifying your availability are more complicated than for Timetrade. Because the available times are inserted into an email people can read whenever they get around to it rather than when they click on a link to schedule, Calendly is better for meetings or conference calls, while Timetrade is better for scheduling multiple interviews or appointments with multiple people at a time.

**Available:** Online.

**Cost:** The basic Calendly app is free. Premium versions start at $8 per month.

**The Assistantto (assistant.to)**

The Assistantto free browser extension is an alternative to Calendly for Gmail users. A version is currently in development for Outlook. Assistantto adds a widget to emails you compose. Simply click on the tiny Assistantto icon at the bottom of your email and pick available meeting times on your calendar. The app adds selected times directly to the email along with a simple message with instructions. Recipients simply click the time they choose or “none of these times work.” If they select a time, it is automatically added to your calendar and to theirs if they are also an Assistantto user.

**Available:** Online.

**Cost:** Free.

**IMPROVE YOUR WRITING**

**Grammarly (grammarly.com)**

The free Grammarly Chrome plugin monitors your writing in real time, checking for grammar, punctuation, spelling, and style. Download the free app for Windows to identify critical and advanced issues with your writing, such as faulty subject/verb agreement, inappropriate colloquialisms and incomplete sentences. You can upgrade to a paid version to add plagiarism checker, style suggestions, and vocabulary enhancement, among other features. The premium version’s bells and whistles are superior to the grammar functions built into the
latest version of Word. Grammarly also connects with your email and social media accounts. No more sloppy social media!

**Available:** Online.
**Cost:** Basic is free. Premium versions start at $29.95/month or $139.95/year.

**Hemingway App (hemingwayapp.com)**
Like Grammarly, Hemingway App allows you to paste or write into the app window. With a single click the app analyzes your text for hard to read sentences, passive voice, adverbs, and phrases with simpler alternatives. While not as robust as Grammarly, it is available at a one-time bargain price. Since splurging on the premium Grammarly app, I no longer use Hemingway. But if you’re unsure you’ll use (or remember to use) a writing app, Hemingway is a good way to put your toe into the water without breaking the bank or making a monthly financial commitment.

**Available:** Online.
**Cost:** One-time cost of $19.99.

**Power Thesaurus (powerthesaurus.org)**
You’ll never use the measly thesaurus you can find with a right-click of your mouse once you experience Power Thesaurus. This superb thesaurus is crowd-sourced, so the word choice options are nuanced and extensive. I keep it open in a browser tab, so I don’t forget about it.

**Available:** Online and downloadable app.
**Cost:** Plans start at $25 per month.

**MANAGE LISTS**

**ToDoIst (todoist.com)**
The choice of task managers is overwhelming. And some of the complex interfaces and advanced features can make the task management itself a major chore. That’s why I like the streamlined design and perfectly calibrated selection of features of ToDoIst. In the free version, you can create projects and organize tasks by project. Download the apps on your tablet, iPhone, and desktop and ToDoIst keeps your lists in sync. Premium paid features allow you to flag tasks by levels of importance and create custom labels across projects, such as “telephone calls,” “errands,” and the one I created to use on Friday afternoons—“braindead”—so you can view and chunk similar tasks. I particularly like the way it handles natural language for scheduling, such as “every third Friday of the month” or “every day starting today and through March 27” or even “remind me to make my American Express payment on the 11th of every month.”

**Available:** Online and downloadable app.
**Cost:** Basic ToDoIst is free. The premium plan is $29/year.

**Workflowy (workflowy.com)**
If you want to manage all kinds of lists, Workflowy offers a bare bones interface where you can add notes. I prefer Evernote—seeing as how I am an Evernote ninja—but this is an easy option for the Evernote-averse.

**Available:** Online and downloadable app
**Cost:** Workflowy basic is free. A pro version is $4.99 per month.

**READ AND VIEW PRODUCTIVELY**

**Pocket (getpocket.com)**
Save blog posts, videos, articles, webpages, or other online content into Pocket to read later from your phone, tablet, or computer, even without Internet access. Tags can help you organize your reading and viewing by specific topics or just general categories you can create yourself such as “work” or “not work.” It’s a productive tool to maximize the use of those few minutes waiting in line or to gather materials that look interesting for batch reading when you have the time.

**Available:** Online and downloadable app.
**Cost:** Free.

**Texture (texture.com)**
I have a severe magazine addiction that, in the past, has added up to some serious cash. Now, for just $9.99/month, Texture gives me access to current and past issues of more than 200 magazines, in a wide range of categories, including business and finance, news and politics, science and technology, travel and regional, and more. These aren’t just the niche magazines you’ve never heard of; They include some of the most popular magazines on the newsstand. The interface makes exploring issues, turning pages, enlarging type, and even sharing articles easy. Many magazines optimize for the tablet format, which adds a whole new dimension to magazine reading.

**Available:** Online and downloadable app.
**Cost:** $9.99/month.

The time you spend learning and integrating app-related processes into your workflow is an investment that will reward you with more time, a better product and less stress. The app market is always changing, with new and better tools being introduced all the time. If you find a new app that helps your business, share it with your QRCA colleagues on the QRCA message board.
Every year, the QRCA awards passes to the QRCA Annual Conference to up-and-coming qualitative researchers age 35 or younger. A $1,300 USD value, the grants cover all registration fees.

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TO LEARN MORE, VISIT WWW.QRCA.ORG/YPG
Have you ever thought that you aren’t seeing “all” of someone, even if you’ve known that person for your whole life? Have you been shocked to discover a totally new side to a long-standing friend, partner, or relative, brought about by the arrival of a new person or situation? If you have, and I’d be surprised if you haven’t, don’t be alarmed. In every social interaction, you are only seeing a single side to someone; a performance, as it were, driven by context, relationships, cultural norms and the intentions of the “actors” involved.

This can prompt us to ask whether we can really identify how someone feels when they are only giving us their best “performance.” What hope is there for research and contextual exploration when any answer that we gather, regardless of method, is only going to be a single slice of a person’s whole identity?

Before there is a great gnashing of teeth, the answer to these questions is (thankfully) yes, and yes there’s hope. We can better contextualise participant behaviour by reframing our interpretation of what an individual identity is and by exploring how people perform varying roles amidst a host of personal, group, and societal pressures. Using specific identity frameworks, we can simultaneously understand how participants have been affected by the research process (and researcher) and use this knowledge to reconsider how we can construct the right “stage” for various performances. This can lead to producing better quality research, and thus better-quality findings. No mean feat; however, to do this, we need to turn to works of old.
“In every social interaction—every research encounter—you are only seeing a single side to someone; a performance, as it were, driven by context, relationships, cultural norms and the intentions of the ‘actors’ involved.”

By Dr. John Whittle
- Further
- London, England
- john@dubishere.com

Adopting and Hiding Identity Roles

For academics like Erving Goffman, author of the ground-breaking *The Presentation of Self in Everyday Life* (1959), Shakespeare’s quote at the start of this article was more than a pithy comment. It was the insight that led him to develop an innovative framework for studying human behaviour, known as the dramaturgical approach. His work approaches social life (including research encounters) as an ongoing piece of theatre, in which individuals perform roles and present themselves to an audience. To Goffman, every identity is fluid—able to alter shape and purpose depending upon the requirements of the moment, and the skill of the individual. Just as actors can affect multiple roles within a play, so too can we adopt multiple identities.

For example, in a focus group or online community exploring parenthood, participants might want to appear to be responsible parents to both the researcher and the assembled group. By successfully displaying behaviours which match with widely held notions about how responsible parents act, others might indeed consider them to be that person. In each of these settings, the other actors (i.e. the parents or friends) will normally perform their identities in a way that maintains the cohesive structure of the interaction. In other words, every individual will perform their best face while actively accepting and working with the other performers on how to ensure that the social dialogue progresses smoothly. Preventing interaction breakdowns, which can occur when a role is openly discredited, and accepting the identity expressions of others regardless of whether you agree with their act, is a key unspoken social rule that guides most of our social interactions.

Masking Identity Flaws and Unmasking Context

Actors will attempt (during any role) to mask inconsistencies which might present opportunities for their performances to be discredited. This can involve hiding contradictory information and behaviours. A parent who wishes to appear proficient in their guardianship might want to include, as part of their group performance, the notion of being caring and attentive to their children. This could involve ensuring that they always provide a healthy and nutritious lunch. When the discussion turns to the subject of packed meals, a parent wishing to be perceived as health conscientious may avoid disclosing the multitude of chocolate bars they hastily stuff into their child’s lunch. If the group includes the children (a daunting prospect!) and a parent’s daughter tries to reveal how many candy bars she eats at lunch, the parent—in order to salvage her role as the good parent—might shush her child or otherwise discredit her child’s role. In my experience, many breaches in the portrayal of a good parental role can come unwittingly delivered from the mouth of a child seeking to deliver their own helpful, honest performance.

While this might seem like a trivial example, our construction and deployment of roles affect how we structure our habits and interactions. We wear suits to interviews in order to appear respectable and professional. We say “please” and “thank you” because we want to show that we are thoughtful and civilized. Understanding why we use different roles in different situations, and why the characteristics associated with each role are (or are not) acceptable in that context, is the challenge at the heart of the vast majority of any research project.

To Be True, or not to Be True, That Is the Question…

Of course, with such a wide range of potential performances available, it can be tempting to frame a participant’s response in terms of true or false. In the example above, a parent has been waxing lyrically about their nutritionally balanced lunch...
“‘All the world’s a stage’—It was the insight that led him to develop an innovative framework for studying human behaviour, known as the ‘dramaturgical’ approach. Goffman’s work approaches social life (including research encounters) as an ongoing piece of theatre, in which individuals perform roles and present themselves to an audience.”

routines, while at the same time concealing a daily chocolate shipment. At face value (excuse the pun), they have distorted the integrity of their response. However, rather than see their contribution as useless or invalid, we should seek to explore why they felt the need to hide one part of their identity and assume another. Goffman helps us to do this, and distinguish between differing identity states, by drawing upon the concept of the front stage, where the performance takes place, and backstage, where actors can relax and prepare for their role away from the audience’s gaze. The focus group in this instance will be the front stage, where the social objective is to appear as the consummate parent and avoid anything that might suggest otherwise. The back stage is where this identity objective is different, or where other elements which do not wholly contribute to the front stage creation are allowed to appear. These terms provide a contextual relevance for each performance, with Goffman keen to point out that the backstage of one role might be the front stage of another.

This means that rather than seeing one identity as valid and the other invalid, we should frame these performances and place them upon a continuum that runs from private to public. Through attempting to elicit as many versions of an identity as possible upon this spectrum, we are then able to gather a more complete sense of who someone is, what they do, and why, across a broader range of contexts. When we apply this identity framework to our research practices, every interaction and scrap of data that we gather is a vital piece of a larger picture; the trick is learning to see the fragments of each performance and its contextual relevance as well as the whole image.

**Identity Tools for the Researcher**

This may sound like a daunting task; however, there are several tools that researchers can use to help incorporate this identity framework.

**Triangulation**

When planning and structuring your research, ask yourself: What combination of research methods can I use (or what different situations can I create) which will capture the various versions of an identity performed by participants that are relevant to the brief? This will allow you to look at behaviours from different angles and in different contexts, and unearth answers which might have otherwise been unobtainable.

For example, you might want to combine unobtrusive approaches to capture behaviour that is unaffected by your presence in the situation (like ethnography or social media listening) with more reactive methods (like face-to-face interviews or focus groups). You may mix methods that allow in-the-moment data collection with more reflexive methods (like online communities). You might use more longitudinal methods to capture how performances change over time and across situations. You could combine individual and group-based methods, in the full awareness that other participants in a group situation actually shape everyone’s contributions. Importantly, we have to also reconsider that such identity decisions are conscious or rational. The roles that are enacted by the individual are just as much a combination of past experiences, social pressures and cultural inclinations which combine to produce instant and unthinking responses. Thus projective techniques, alongside rationalized responses and recalled tasks, will help uncover conscious and subconscious role choices. Offering multiple and different opportunities for individuals to express themselves will yield a far greater range and quality of identity performances.

**Participant Comfort**

While triangulation is excellent for creating varied spaces for identity expression, it is important to ensure that your participants also feel comfortable sharing alternate versions of themselves. Demonstrating a non-judgmental and empathic approach when interacting with individuals will encourage them to share sides of themselves which might consciously oppose information they have shared elsewhere. When interviewing the parent from the focus group and revisiting the discussion surrounding their lunchtime habits, once you have established their actual behaviour (uncovered through your triangulation of social and private methods), it would be ill-advised to challenge the response they provided when surrounded by their parental peers. To help generate a more intimate conversation, tactfully acknowledge that they might have felt inclined to
offer an answer that differed from their typical behaviour and show that you understand the pressures and nuances of the situation. You might then examine why each performance was used, and the norms surrounding each role.

**Consider Your Role**

Mastering the ability to explore identity roles, without coming across as abrasive or interrogative, takes practice. However, as stated at the start of this article, no one is exempt from hiding or showing very different sides of their identity, including you as a researcher. Accepting that we all adapt to social pressures and adopt differing roles, without attempting to hold each other to a singular fixed identity, will help you better understand the motivations of your participants. When designing your research, take some time to reflect on how you might respond to your tasks and activities as if you were the participant. Consider the social pressures and values that they might be subject to, how this might shift depending upon their situation or environment, and how the methods at your disposal can reveal or accommodate these roles. Ultimately, simply being aware of and sympathetic to the fluidity of an identity under pressure and openly discussing this, without challenge, will often yield incredible results.

**Charity and Identity**

This identity framework played a key part in a recent project which explored the modern UK family and their relationship towards charitable giving. The examples threaded throughout this article are not arbitrary, but genuine cases of how understanding identity and using multiple methods allowed us to connect deeply with parents and explore very private behaviours and habits. By structuring the project in a number of stages, we were able to first investigate the current state of families across the UK, including the challenges they face and the values that they hold dear, before diving into a more granular exploration of how these factors affect their relationship with charities, and specifically, their opinion of the charity which had commissioned the work.

Building close relationships with the participants across varied methods and contexts allowed the research team to unearth a multitude of roles which were vital in identifying how the client needed to adapt their fundraising approach. At the start of the study, during a social discussion, families responded positively about engaging with charities while managing the pressures of a modern family. However, during later phases (and after the research team had bonded with the participants) they were more open about the everyday issues which affected their time, motivation and capacity to give. Exploring the differences between these responses and why they had been performed enabled us to identify the real issues that each family encountered and provide our client with the actionable insights they needed to successfully execute their new fundraising schemes and provide compelling value to families. Had we not used this identity framework, gathering these personal insights, connecting with our participant group, and understanding the varied answers we were receiving would have been far more challenging and time consuming.

**Curtain Call**

Using the lens of the dramaturgical approach when exploring social life will allow you to evaluate data more critically. It can highlight key areas to explore, suggest new questions and even reframe data that might initially seem irrelevant—all through understanding that every role is part of an important and interconnected personal production. Next time you create your research script, take a moment to familiarise yourself with the roles that you and your actors might play and begin to read between the lines. 

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**Qualitative Research Consultants Association**
With the advent of virtual reality (VR) and augmented reality (AR), we now have the ability to send people into worlds where they can experience these new ideas in settings more realistic than ever before. Consumers can then more authentically interact with these ideas, modify them, and explore how they would use them in their own lives.

These technologies will likely have a powerful influence on many aspects of the research field. Researchers will be able to share experiences with consumers even though one may be at home in one location, while the other is in her office hundreds or thousands of miles away. Consumers will be able to manipulate and build concepts in collaboration with researchers and design teams. Clients will be more engaged as they observe and interact with their consumers in these virtual experiences.

To understand where these technologies are headed, I interviewed researchers on the client and agency side, held some brainstorming sessions, and looked into VR developments in research and other fields.
This article is intended to give an overview of VR/AR today, and more importantly, explore what these developments might look like in the near future.

**Terminology**

As with many evolving fields, there is some debate about terminology. "Virtual Reality" is generally accepted to mean an experience where you wear a video headset (and sometimes headphones) that allows you to immerse yourself in experiences totally different from your current reality. For example, the Microsoft HoloTour allows you to take a tour through Rome with the ability to explore ancient as well as contemporary Rome while learning facts along the way.

"Augmented Reality" combines imaginary experiences with your actual world. Pokémon Go is an example of this, where people see fictional characters on their phone cameras while also seeing images of wherever they are at the same time. Unfortunately, there is lack of agreement on an umbrella term to cover all of these experiences. For this article, I’ll use the term "Virtual Reality" or "VR" also as an umbrella description for the VR/AR category.

**History**

While many VR experiences have just been developed, humans have been trying to create and capture alternative experiences for thousands of years. Some believe that cave art made over 30,000 years ago was done in a way to portray motion and symbolize the essence of the animals that provided sustenance to early people. In fact, stereoscopes of the 1800s were so captivating that Oliver Wendell Holmes (an early developer of this dual-photograph technique) said, “The first effect of looking at a good photograph through the stereoscope is a surprise such as no painting ever produced. The mind feels its way into the very depths of the picture.” Stereoscopes evolved into 3D and 4D movies that people enjoy today. These technologies reveal the power of storytelling that taps into human emotions and physiology.

**VR/AR Today**

A few companies have started conducting research studies in VR. System1 Research (formerly known as Brainjuicer) recently conducted a virtual shopping study for Hershey’s. John Kearon, their founder and CEO, explains the project, “VR captures, with a very high degree of predictability, the likely sales impact of any piece of shopper marketing, including packaging changes. The reasons why something works, or why it decreases sales, is always supposition because we generally shop on auto-pilot and if we’re asked to explain our purchasing, we’re really just making up a plausible story.”

Initially, InContext Solutions started conducting shopping studies over a PC, and they now offer enhanced versions of these shopping experiences using VR. These early innovators show that VR has a compelling place in the growing set of research methodologies. Amy Hebard of InContext says, “Once VR headsets are ubiquitous in households, they could explode as a research tool.”

Currently, about 5% of North American Internet users between the ages of 16 and 64 own some type of VR headset, according to a study by Global Web Index. Once ownership and familiarity with these devices grow, there will be a much larger audience willing to participate in VR studies either in a facility or from their homes.

Existing VR technology on the low end starts with the $15 Google Cardboard, which is a simple cardboard viewer with a pair of lenses into which you place your mobile phone. The next level of VR viewers are basic headsets (around $100) into which you place your mobile phone. The next level of VR viewers are basic headsets (around $100) into which you place your mobile phone. These have head straps and are much more comfortable and durable than cardboard versions. On the higher end of the consumer spectrum are viewers (some with headphones) that connect to a PC or gaming console. These are priced between $300 and $600. Mobile phone viewers are more compact and portable, but the PC/gaming VR systems allow for more robust experiences and don’t drain mobile batteries as quickly. AR apps can be downloaded onto most current smartphones.

**VR/AR Research Uses**

I asked a number of research experts how they see VR/AR being utilized in research in the coming years. Their ideas...
cover the areas of concept exploration, ad testing, co-creation, building client empathy, and enhanced presentations.

VR will allow participants to experience concepts more viscerally, so they can react and respond in a more authentic way. Participants could use VR to better explore conceptual locations such as hotels, restaurants, cruise ships, airports, or other places to evaluate design, signage, navigation, overall appeal, or other aspects. AR can be used for consumers to virtually try on different clothing items before they purchase them. AR apps (now available from IKEA and Amazon) allow shoppers to see what a variety of products would look like in their homes. Researchers could use these AR tools today to have consumers better react to products and talk about how they would use them in their homes.

Some of the researchers I spoke with suggested a variety of creative future applications for VR. Imagine a participant taking a virtual drive through their city, with instructions to find the best route to their library. The participant thinks this is a navigation test, but in reality, many other elements could be tested. It could be an advertising study to learn about the effectiveness of virtual billboard or radio advertising. It could evaluate the usefulness of signage. It could test the usability of a new car cabin design. It could be used to explore the design of a new library and its parking signage. The options for virtual experiences are only limited by the imagination of the researchers and programmers creating the study.

Many of the people interviewed for this project suggested that VR/AR could also be used for co-creation. Teams comprised of consumers, researchers, designers, and other clients could work together to evaluate, manipulate, and improve concepts in a virtual world. Amira Youssef of Microsoft says, “Sometimes concepts can be difficult to describe or portray. With VR, you can make it much more realistic and invite the participant to engage with and even manipulate the experience.”

Amy Hebard of InContext suggests that virtual co-creation could also work in the retail environment, “In addition to doing virtual shop-alongs, we could have participants build their own ideal store, shelf set, or signage.”

Another potential for VR is to take more complex concepts or service experiences that last months and transform them into virtual experiences that can be more easily digested and evaluated. Brett Ross from T-Mobile says, “VR might allow us to take what is typically—in the real world—a two-month research, shopping and onboarding experience and turn that into a virtual experience that can be tested in an hour or two.”

Virtual experiences could also be used to better build empathy and understanding among clients. In the virtual world, clients could play the role of sales or customer service people and have interactions with customers without having to leave their offices. A summary of these experiences and insights could be presented in VR, so that client teams would understand the consumer experience in a more visceral way. According to Brett, “We could use VR to present back to stakeholders so they can really experience what it is like to be the consumer. This could be an incredibly powerful tool to build empathy and understanding.”

VR could also be used by clients to take ideas and more effectively present them to retailers, suppliers, or other partners. Arun Rajan from John B. Sanfilippo & Son (processor and marketer of nut brands such as Fisher Nuts) says, “In the future we might be able to use VR to present our product and sales ideas to retailers and better help them envision it in their stores. This could be much more efficient than building actual test shelves and might better help us to sell our ideas up the management chain.”

Considerations

Running VR studies will take a bit more time and involvement to ensure participants are comfortable and ready to start the experience. As Shaili Bhatt of C+R Research suggests, “When working with consumers and wearables like Google Glass, you have to give them a few minutes to wear the gear and unpack their emotions. They can then start the test after having had a bit of experience with the technology.” Some researchers have participants play a simple game (similar to those on their mobile phones) before the study starts, so that the participants are comfortable with the technology. But, once the participants enter the virtual world, it can be

Rather than waiting for VR to come to our industry, innovative qualitative researchers should be encouraging clients to consider these technologies and how they can be used to conduct more engaging and realistic research.
surprising how quickly they are immersed in the experience and become part of that other world. Youssef (Microsoft) says, “The experience of VR is so engaging that people quickly forget about the tech and the wires. They become so immersed that everything else disappears.”

These new technologies pose business opportunities for many of the organizations involved in the broader fields of research. Online communities and panels should be able to recruit participants who own VR equipment in order to participate in studies at home. As Bhatt describes, “If participants have this gear at home, they could self-narrate, and then link or upload video streams of their experiences to an asynchronous community platform or chat with a researcher online in real time.” Another option would be to ship lower-priced viewers like Google Cardboard to participants in an individual project.

The facilities of the future will hopefully have rooms dedicated to VR studies and ideally some warehouse-sized spaces where participants can wander around a space as big as a grocery store to have a more natural experience. In the near future, this technology will also be able to capture information such as data that reflect exactly what happened, plus physiological information such as eye tracking and facial recognition that will allow for more accurate and robust reporting. Videographers of in-person ethnographic studies will also be able to film in VR, creating more powerful presentations to the end client.

All these experiences will require a great deal of programming. This could come from the end client as much of the current stimuli does. But, there is also an opportunity for researchers or other industry partners to pre-program environments (such as grocery and drug stores) and then simply add in the clients’ products, so that new environments don’t have to be created from scratch each time.

The Role of Qualitative Researchers

While much of this may seem overwhelming, qualitative researchers already have most of the fundamental skills needed to run VR studies. At the start of an interview, good researchers set the ground rules and help the participant to relax and feel comfortable sharing their stories. VR studies would still require researchers to help guide the experience, fill in the white space where a virtual concept may not be one-hundred percent clear or complete and, of course, ask all the questions that quallies are already good at asking.

There are many things you can do now to prepare yourself for VR. Try out VR apps with a device as simple as Google Cardboard. Visit a VR arcade or technology store and try out the more advanced experiences. Try out the IKEA and Amazon mobile augmented reality shopping apps and consider having your participants use them as part of diary studies, ethnographies, or in advance of groups. Talk to your clients about VR and see if there are people in their organizations exploring this technology.

Youssef suggests that these new technologies will allow our field to stay as relevant as possible. “Some wonder if marketing research could become obsolete. They question the similarity between the research setting and real life. With VR, we are much closer to simulating real life and getting as close as possible to actual behavior.”

Bhatt believes that this will also allow for more compelling client experiences. She says, “Clients want to be in the moment with participants without interrupting the natural process. VR experiences will allow that to happen.” Rather than waiting for VR to come to our industry, innovative qualitative researchers should be encouraging clients to consider these technologies and how they can be used to conduct more engaging and realistic research.
As DIY research tools become more common in our industry, how might marketing researchers prove their added value to justify their fees? With many relying on a simple Q&A approach, just how do great qualitative researchers distinguish themselves? The answer often lies with advanced techniques and knowing how or when to leverage them. These techniques are specially designed to help uncover participants’ deeper attitudes or perceptions and are exactly the type of advanced knowledge that clients look for when hiring outside consultants.

The following offers examples of some excellent techniques to use in your next qualitative session, which will help to solidify your position as an expert and valuable resource for any organization.

Pre-session Techniques
Many advanced techniques are thought of as in-session exercises, but assigning them as pre-session tasks can be equally beneficial.

Representative Object
HOW TO DO IT: During recruitment, ask participants to bring an object to the session that represents what a certain product or brand means to them. During the
session, allow each participant to present their object and to explain why they chose that one specifically.

**Benefit:** This approach sets the stage for a creative session and affords participants the opportunity to reflect more deeply than they otherwise would. For the client, many interesting perspectives on brand or product perceptions are observed, and the report can be enriched with visuals that participants leave behind.

**Example:** A government organization with a long history in Ontario wanted to understand how different generations perceived it. Some objects, brought mostly by the older generation, suggested that this organization held great significance for them. Participants from the younger generation, however, brought very factual objects (like an invoice) which demonstrated a more shallow relationship.

**Documenting**

**How to do it:** Ask participants to film or take pictures of their homes or offices (depending on the subject of the study) and to submit them electronically before the sessions begin. This can be an excellent technique to use when it is believed that these environments may impact shopping habits.

**Benefit:** When hesitating between in-home or in-facility qualitative sessions, the documenting technique can help combine the best of both worlds.

**Example:** A gaming company wanted to gain an understanding of the environment that their target played video games in. However, the client preferred the logistical advantage of hosting focus groups in a facility. All participants were tasked with documenting their gaming areas at home and sent them to us before coming to the focus groups.

**Journaling**

**How to do it:** Ask participants to keep a diary of the type of behaviour that will be explored during the qualitative sessions. The participants are then told to bring their journal/diary to the sessions and discuss their experience, elaborate on what the positives and negatives were, or explain what they learned during it. The journaling period can range from a few days to a month depending on the subject of the study.

**Benefit:** This approach helps distinguish perceptions or memory from the actual reality. Participants note down their behaviour over a period of time, thus revealing the truth about their habits by the end of the exercise.

**Example:** A company that specialized in frozen dinners wanted to better understand the true dinner habits of their target, knowing that heads of households tend to romanticize how healthy and prepared their family dinners are. The journal that participants were asked to keep over the course of a month (and to update daily) included whether the family ate dinner together, how much preparation time was dedicated to this meal, and what they actually ate.

**In-session Techniques**

Once the sessions have begun, a wide variety of techniques are available to choose from, and combining them can often be the best way to obtain insightful results.

**Deprivation**

**How to do it:** First ask participants to imagine that their favourite brand is no longer available, and then follow up with questions on the potential impact of this scenario. Would they easily find a replacement brand? Would they have to conduct a significant amount of research before buying another brand? Would they elect to abandon the category altogether?

**Benefit:** This approach demonstrates what attributes are top of mind for the participant and what type of positioning or sales argument they spontaneously feel would be most convincing. Based on their testimony, we can infer what actually matters most to them.

**Example:** A digital advertising company wanted participants to assume the role of salesperson and explain how they would sell the solutions being offered. This demonstrated where each participant perceived the most value and, in
turn, convinced the client to adjust their areas of focus.

**Brand Personification**

**HOW TO DO IT:** For this technique, ask participants to use human traits to describe a brand. Probing at each stage is required, but initial questions might include: Would the brand be male or female? What age would it be? What type of job would it have? What would its personality be like? What would it look like? Would it be single or married? Would it have children or not? What type of house would it live in? What car would it drive? What hobbies or activities would it have?

**BENEFIT:** This technique provides a richer understanding of the impressions that the brand is generating. Answering the questions above paints a clear picture of the brand and often reveals what type of marketing messages need to be communicated to better align the personality of the brand with the intended positioning.

**EXAMPLE:** A cosmetics company wanted to better understand how one of its brands was perceived compared to the competition and was prepared to use the feedback to craft a new advertising campaign. To help in this process, the ad agency wanted a very clear understanding of the type of person who would use it.

**Thematic Apperception Test**

**HOW TO DO IT:** Also known as a picture interpretation test, the rationale behind this technique is that people’s interpretations of ambiguous situations are based on their own past experiences or their current perceptions. With this approach, participants are presented with pictures of individuals in various situations and are then asked to indicate what the person in the picture might be thinking or saying.

**BENEFIT:** With the participants projecting onto someone else, they are more likely to reveal deeper thoughts or even sensitive information that they would not provide if asked directly.

**EXAMPLE:** A CPG company wanted to understand attitudes during the shopping process, so participants were shown pictures of individuals shopping for a food product and were then asked to indicate what they feel that person might be thinking.

**In-person vs. Online**

Online communities that facilitate qualitative discussions usually can accommodate the use of advanced techniques. Pre-session exercises can be done whether the session ends up being done in-person or online. Similarly, most of the techniques above can be done with screen sharing technologies, which allow the moderator to present images to the participants. The only exceptions are role playing exercises, which are generally more easily completed when the moderator is in the room with the participant and can prompt the discussion as it ensues.

**Summary**

These techniques are by no means an exhaustive list of all the options that can be used in qualitative sessions, but applying any one of them is an excellent way to bring added value to the process. These techniques help clients discover the “aha” insight that is more likely to go unnoticed when using a basic interviewing approach. As with all forms of marketing research, quality and creativity drive client loyalty, and using advanced techniques offers a sure-fire way for moderators to innovate and leave their unique mark on their sessions.
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PUTTING HEART INTO YOUR BUSINESS:
PROVEN TECHNIQUES FOR ENGAGING B2B/PROFESSIONALS ON A DEEPER, MORE EMOTIONAL LEVEL

Tactics and strategies used in the past by marketers to target B2B/Professionals have typically been quite distinct from those used to reach consumers (B2C). But there is a growing trend among B2B marketers to understand their buyers as people, more than just their professional role. In that respect, the lines between B2C and B2B are starting to blur.

As B2B marketers look to adopt a more personalized approach to marketing, they will turn to qualitative research to help find those deep emotional connections that can differentiate brands in the marketplace and lead to brand loyalty in the B2B world.

While emotion-based research has been at the core of consumer understanding for years, it has yet to truly break through when it comes to understanding and engaging B2B professionals, who are known to strongly self-identify as rational decision-makers.

By applying creative techniques typically reserved for consumer research, researchers can reveal rich untapped emotions that have the potential to drive behavioral change among business customers.

Approaching B2B Projects Like Consumer Ones

The biggest challenge facing researchers is not getting insights using this approach, it’s convincing your clients to give you the chance! How often have you heard that you can’t get doctors / farmers / CEOs / [fill in the name of your professional target audience here] to talk about their emotions?

Clients are very quick to point out all the reasons why it won’t work:
- They don’t have time to participate.
- They won’t open up and share with others whom they see as “the competition”.
- They can’t think creatively.
- They have short attention spans and won’t have the patience.
- Their rational self-awareness gets...
“Not only are activities a lot more fun than answering direct questions, they also make participants feel like you’re really listening when you probe to find out more.”

in the way of acting on their emotional drivers.
• They only want to talk about what they think is important, not what you want them to focus on.
• They will think it’s silly.
• This isn’t an emotional category.

What follows are some proven techniques designed to help you approach your next B2B project like a consumer one.

Step 1: Identifying the Best Methodology
A client once approached me to do insight generation focus groups with grape growers in California. I explained that getting a group of farmers together at the same time for two hours at a central location in the middle of harvest to talk about their feelings was likely not going to happen!

However, online discussion forums (or bulletin boards) represent an ideal way to reach busy, geographically dispersed professionals. They have the luxury of time to reflect and respond on their own schedule, and the anonymity allowed by online reduces the influences of others in a group and lets them express themselves more freely.

Work around their schedules—time tasks so the last day is a Friday and give them the weekend to complete.

Ensure they have enough time to complete the required tasks—if you plan three days of “activities” allow at least a week to complete.

Assign “code names” to protect privacy—colours, spices, animals (but avoid countries if you can).

Step 2: Getting the Right People
Well it’s true, not every B2B professional is cut out to find a picture that represents how selling propane makes them feel or find a metaphor that speaks to the challenges of growing corn. Just like you would for insight generation with consumers, you need to start by getting the right people. Use creative screens (yes, the same ones you use for consumer work!):

Statement agreement:
- If asked to describe something, I can usually do so in detail.
- My friends consider me to be friendly and outgoing.
- I enjoy meeting and talking to new people.

Comfort and willingness:
- To use Google or other search engines to search the Internet about related topics.
- To upload a picture through the Internet to a website.
- To express opinions and thoughts in an online group setting.

Creative task:
- Imagine you were chosen to be on the cover of an agricultural magazine—what would your cover story be?
- If you could invite three people from history to dinner, who would you invite and why?
- If you were a book in a library, what book would you be and why?

Step 3: Engaging Their “Human” Side
We are all human beings with a need to be heard. The secret is getting professionals to tap into their inner “every day Joe” while still speaking to you from their perspective as a professional.

Show them you are “real” and not a computer program—give them your personal email in the event they have questions. Video record introductory instructions where possible (which also forces them to listen to your instructions and not skip ahead making assumptions!)

Acknowledge their expertise—in the introductions ask them for three words to describe themselves, then reflect that back in your welcome response.

Encourage interaction—participants want to share (and hear from!) their peers more than you realize (code names will protect their privacy).

Step 4: Generating Insights
Once you’ve created a safe space for people to be heard, it’s time for activities that allow those deeper, more unconscious human emotions and feelings to come to the surface as participants start to let their guard down. Not only are activities a lot more fun than answering direct questions, they also make participants feel like you’re really listening when you probe to find out more.

Mind Map—get business participants thinking emotionally right from the start by having them come up with 8-10 statements describing thoughts, feelings, hopes and concerns (a greater number of statements forces them to move beyond the functional and into the emotional).

Let’s Vent—let them get things off their chest. What they love and what they don’t, what they wish things were like and what prevents that from happening, etc. Giving participants a chance to focus on some of the things they want to talk about makes it easier to get at the things you want them to focus on later in the discussion.

Advice Activities—stroke their egos a bit by speaking to them as experts using activities like asking them to give advice to an outsider (such as someone from another country visiting to learn about industry best practices) or participate in an...
interview where a journalist is writing an article and has asked to interview them.

**Projection Techniques**—photo collages (e.g. “What does it mean to be a doctor?”) and word analogies (e.g. “For me, growing cotton is like…”) work really well. Just reinforce in your instructions that you do not want pictures related to the topic such as stethoscopes, tractors, etc.!

**Deprivation**—take their brand away and ask what they would miss. What kind of impact would it have? How does that leave them feeling?

**Word Pick**—expose them to a list of 15-18 emotions/feelings and ask them to select three that describe how they feel (and their reasons of course!)

**Other Things I’ve Learned along the Way**

Although every project comes with its own unique set of challenges, here are some things I’ve learned along the way that are important in all situations and can make it easier when it comes time to put what you’ve learned into practice.

Tell participants exactly what they will be doing over the course of the project and be honest about how much time you expect it will take.

Don’t skimp on their incentive—these are professionals, and their time is valuable. Assume they will take 50% longer to answer your questions than you think, and pay them accordingly.

Be respectful but don’t be afraid to give them gentle reminders and follow up if they’re running behind or not giving thorough answers—as professionals they understand they are being paid (well!) for their time.

**Offer bonuses**—you would be amazed how excited senior executives can get about winning a $50 bonus draw! Tie it to a deadline—you’ve given them a week, but you really want them to wrap up on the day the final activities are posted.

**Over-recruit** and ask a couple of participants to standby for the first day. Even if everyone you recruited recently confirmed their interest and willingness to participate the day before, things will come up, and they will truly feel bad about having to bow out.

**Ask for feedback**—on the last day when you wrap up and thank them for their time, ask them what they thought about the experience. Both you and your client will be surprised by what you hear!

Engaging B2B professionals using proven consumer techniques to get at deep emotional insights can help position clients for long-term success and achieve differentiation in an increasingly competitive marketplace. If your client is still not convinced, simply remind them that B2B professionals are people just like you and me! They walk the dog, take the kids to soccer practice, buy groceries, binge-watch *Breaking Bad* and sing in the shower… the secret is getting them to tap into that inner “everyday Joe” while speaking to you as the professional that they are.
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The questions set out at the beginning of the study were:

- How and where to find potential participants willing to share their experience and give us insights without being paid an incentive?
- How will the conduct and answers of those participating for free differ from paid participants?

Social media channels such as Facebook were used to recruit potential participants. Social media groups often center on common interests, so our research team joined social groups that potentially could be relevant to the study. Targets for recruitment were relatives taking care of elderly people as well as professional caretakers for elderly people.

The study was conducted using a German-language online community platform allowing participants full anonymity. Participants could enroll themselves using links shared on social media.
The difficulty: the client’s budget was tight, and they could not afford to pay any incentive to the participants. We had to find respondents willing to participate for free.”

The recruiting of non-paid participants turned out to take longer and to be more challenging compared to getting incentive-based participants. However, the richness of data from those non-paid participants, without our even probing them, was beyond our expectations. The ease of use of the platform as well as full transparency for the participants proved key in establishing a relationship of trust.

1. Create Trust

Communities such as Facebook and its many subgroups are based on acceptance. After joining the groups, the moderator published the link to the study using her own name, including a brief summary of the purpose of the study and the company conducting it. The communication on social media started the moment the link was posted online. Within the first minutes, people in the Facebook group were questioning the research intentions and discussing their bad experiences with research. Initially, some active forum users were rather aggressively rejecting any market research and “so-called studies.” They had participated often in surveys, did not really understand what it all was for, and felt past time and efforts had been unappreciated. The tone was one of frustration: “Another study, I cannot hear it anymore!”

Expectations and frustrations had to be managed immediately to avoid a negative wave. A member of the research team logged in, as herself, and gained the trust of those on this forum. In the end, community members considered us favourably and eventually started supporting and defending our cause. After initial rejections, some community moderators even supported our cause, asking participants to join and participate in the study. “Dear members, (moderator’s name) published her study with a link and asked us kindly for help. With all my understanding regarding the frustration of past studies, I still ask you to either participate, stay neutral, or skip this post.” Some of the active members, and even community moderators, participated in our study and provided positive feedback and comments to their community. This helped to increase the number of participants.

Our own Facebook page also noticed a sudden increase in attention with readers researching who we were. Obviously, participants wanted to find out more about the researchers behind the study.

After overcoming those initial hurdles, we managed to get great participants for our research. Two participants also shared their experience of participating in our study on social media to motivate peer members to join the study:

“Participated. Short summary: Different from many studies before, less statistics, more free formulations, open questions, dialogue with other participants—well anonymized for the others.”

2. Engaged Participants

The huge difference: these participants did not participate for an incentive but rather to see a change. They made our cause their cause. Compared to incentive-based studies, the answers of these participants were often more detailed, providing comprehensive pictures of specific situations. With an established trust relationship, and without a financial motive, the recruited participants were willing to share more honest opinions and deeper insights into their feelings. They allowed us to enter their day-to-day lives, take part in their daily challenges and frustrations without hiding or whitewashing the truth.

As always, participants could leave the study at any time. There was no monetary carrot to motivate full participation. Nonetheless, every participant but one who started the study answered all the questions through the very end. Many participants also came back multiple times to answer follow-up questions and to engage in discussions with their peers. With incentive-motivated respondents, this is not always easy to achieve. As moderators, we often have to be very involved and use follow-up emails with incentive-based participants to promote high engagement.

These participants made positive remarks about the study focusing predominantly on the dialogue, personal feelings, and worries, rather than on statistics. They appreciated the wide-open ears of the moderator listening to their answers, and they willingly gave even more details:

“The questions are good, mainly because they also refer to us and our feelings and worries and give us space for it. Thank you.”

But their engagement went beyond answering the questions in the study. Many participants wished to receive a summary of the outcome:

“It would be nice to hear the result from the study. Thank you.”

“Looking forward to an evaluation.”

After the study was completed and the client had reviewed the results, a summary of the highlights was in fact shared with all participants.
3. **Keep it Simple**

Participants were asked initially to sign up for the study by email to subsequently receive more information and get invited to the research community. This approach did not prove to be successful; only three participants were recruited this way during the first week.

So, the approach was changed and the link to the study was published directly in a post on social media. Also, we ensured the setting was strictly anonymous to guarantee anonymity for all participants. None of the client’s information was included on the platform, so we could risk making the link public. Within three days 13 more participants enrolled online.

Normally, research is set up in smaller bites for respondents to focus on each day. This time around, though, all the questions could be seen at once by the participants to avoid frustration and to give them a feeling for the length and type of questions of the study. Most joined the discussion immediately, coming back multiple times.

Researchers love to see videos and images of real lives. Professionally recruited participants are told upfront and will get paid for the extra effort it takes them. This turned out to be more difficult with participants who have been recruited through social media. They all had the option to post videos or photos online using a private mode; however, no one used this function; they considered it too complicated or time consuming. Overall, participants were motivated to participate, but it had to be made as easy and as technically simple as possible for them.

**Conclusion**

Recruiting participants without paying incentives requires more time and involvement from the researcher. It is faster to pay a recruiter than to immerse the project team into social media. Using this approach also presented a steep learning curve for the researchers, but in the end we mined valuable nuggets via social media and gained insights that we later used as a basis for discussion. So, while there is more effort required, there is also substantial gain for the research.

Establishing relationships based on transparency and trust is key. Moreover, participants had to understand the reason for the research and what was expected of them so that they could identify with the cause of the study. And, most importantly, the participation process (e.g., clicking directly on the link to the study) had to be made easy.

In the end, the high engagement translated into a great richness of data. Overall, the answers were extremely detailed. Contrary to what researchers would see with paid respondents, a lot more details and insights were given without the necessity of additional probing. Respondents did not participate for a financial benefit but instead to support a cause. As such, they were willing to put in more effort than paid participants. They took the questions to heart and answered them as honestly and in as much detail as they could.

While the initial recruiting phase of non-paid participants might be more challenging, it paid off through the richness of data gathered during this study.

A basic requirement to success with “no incentives” is having a topic that speaks to the heart of the participants, that offers an opportunity to share and thus improves a service and/or product that is of high interest to them. If we need to test a logo or a visual, there will be less response for that than for a product or service that is dear to their hearts. When the topic is important, it motivates people to participate and to share in ways no amount of Euros can achieve.

“While the initial recruiting phase of non-paid participants might be more challenging, it paid off through the richness of data gathered.”
David R. Morse's Multicultural Intelligence: Eight Make-or-Break Rules for Marketing to Race, Ethnicity, and Sexual Orientation provides a foundational and interesting review of the history, the current state, and his projections on multiculturalism's impact and role in the US. Read this book and you will be significantly better informed on multiculturalism, benefiting both your personal life and your professional life.

This 2017 second edition incorporates major revisions and additions to the 2009 first edition. Morse has added significant amounts of new data from the US Census, Pew and from many other sources, to underpin his perspectives on the ever-changing face of what he identifies as four discrete cultures: Hispanic-, African-, Asian-, and LGBT- Americans. He asserts that they each “have distinct identities that separate them from the mainstream,” and have “unique needs when it comes to the types of brands or products they buy and that they need to be communicated with differently in order to be persuaded to become customers.” When Hispanics, Asian Americans and African Americans represent $3.5 trillion in purchasing power, it is imperative to understand them, respect them, and know how to reach them.

Morse has also clearly done his homework on the evolution of each group, their treatment in the media, and the success of various companies’ efforts to connect with them. Morse helps make the data come to life by integrating individual stories he garnered from the hundreds of interviews he conducted with multicultural Americans and experts.

Multiculturalism is a complex topic. For example, the term Asian American over-simplifies the 22 or more races and ethnicities the term represents, which are as diverse and different from each other as Japan is from China or Singapore is from India. The same goes for Hispanic Americans—who in the US are majority Mexican (two-thirds), and embrace ethnicities as diverse as Puerto Ricans (who are native born US citizens), Colombians and Peruvians, to name but a few.

The book is divided into two sections. In Part I, Meet the New Americans, Morse does a successful job in highlighting the similarities, but mainly the differences, between these four discrete cultures—although of course LGBT Americans also reside within the other three groups. He raises a fundamental question, “Is America the ‘melting pot’ so often referred to, or is it more of a ‘salad bowl’? In this book, he demonstrates that it is currently more of a salad bowl—sometimes, and in some places, the ingredients appear to integrate together well into a harmonious and familiar experience that could be considered mainstream, and at other times the ingredients appear to be mixed together but have such different flavors that they remain discrete in character and fail to assimilate.

Taking the culinary analogy one step further, he paints a picture of the US today as a multicultural recipe book. Each chapter in Part I has its own distinct cultural character, with recipes born of deep-rooted differences in heritage that are passed down from previous generations, but slowly adapted by each new generation to better fit their own tastes, and which slowly evolve as the world in which they are immersed exposes them to new influences and experiences.

Morse reminds us that “today’s young Americans have known nothing but a truly multicultural America.” This is borne out by their regular diet of foods from multiple cultures and often a fusion of different cuisines. “Millennials are the most diverse adult generation in US history. In 2016 they were about 56% white, compared with 72% of Baby Boomers, and the white percentage drops to 50% when looking at those ages 12 and under, meaning that well before 2020 white children will become a minority.”

If ethnic distinctions go away, then multicultural marketing will become extinct and the concept of Total Market Approach (TMA), where diverse segment considerations must be integrated within one overarching mainstream marketing strategy, will likely continue to be embraced by an increasing number of top companies that will join the likes of Toyota, Clorox, and Wells Fargo. In the meantime, we as researchers will need to determine how research practices can best support both multicultural marketing and TMA.

In Part II, Morse outlines the Eight Make-or-Break Rules for Marketing to Race, Ethnicity, and Sexual Orientation, which are referenced in the title. Morse provides eight distinct, insightful, and constructive suggestions to understanding and operating in a world of multiculturalism.

Multicultural Intelligence provides a valuable guide to anyone in a role informing or designing multicultural marketing and communications, and it is an invaluable guide to anyone who can be held responsible for it.
room-only presentation by David F. Harris. The audience of mostly client-side market researchers was deeply engaged. Interestingly, the Q&A included questions about research scenarios and taking a strategic approach to questions that also applied to qualitative research design and discussion guides. The presentation was followed by a stampede to buy his book, which quickly sold out. (At a list price of $54 this book is not inexpensive, but the value you get makes the price seem like a bargain!)

Harris was an excellent presenter, and the audience was captivated by his many examples of typical question setups and better ways to both ask the question and provide forced choice answers. By providing context through the use of background stories, Harris expanded the power of this book beyond being a simple guide about writing better questionnaires to one that provides both a strategic framework for conceptualizing a research study and a process to frame better questions—all which could apply to qualitative studies.

Importantly for qualitative researchers, in his book and presentation, Harris is a big proponent of fielding qualitative research as a precursor to writing and fielding a quantitative questionnaire study to ensure you get a better understanding of what topic areas should be covered in the questions, how questions should be worded (consumer language) and what the range and wording of the forced choice answers should be.

The Complete Guide to Writing Questionnaires also provides very good guidance on how to best match the type of question being asked to what format the answer should be in, i.e., open-ended or closed, select from a list, rate things on a scale, etc.… In addition, Harris is a master of pointing out the situations where “you think you’re asking this question but the respondent will interpret it differently” and cases where you think you are asking one question but by not clarifying the unit of measurement you really are asking two different questions, which makes it very difficult for a respondent to answer.

Another helpful section of The Complete Guide to Writing Questionnaires is the discussion on the importance of how you order questions and how a specific order can help avoid order bias, participant fatigue, and confusion regarding sets of questions. In addition, Harris stresses not leading with difficult or sensitive questions such as “Please tell us why you chose Ramis College over the state University.” He notes that questionnaire writers may not be aware of why their question could be difficult for a respondent.

"WRITING QUESTIONNAIRES IS ARGUABLY ONE OF THE MOST CHALLENGING FORMS OF WRITING. IT IS, IN A SENSE, A CONVERSATION BETWEEN YOU AND HUNDREDS… QUESTIONS HAVE TO BE WRITTEN SO THAT EVERY RESPONDENT CAN AND WILL ANSWER EACH QUESTION ACCURATELY, WITHOUT MISINTERPRETATION AND WITHOUT BIAS. THE CHALLENGE IS DAUNTING."

—BOOK EXCERPT

In addition, Harris also identifies questions as falling into three specific categories: History, Perception & Attitude, and Intention. He goes on to explain why they must each be framed differently.

The Complete Guide to Writing Questionnaires: How to Get Better Information for Better Decisions should be read by anyone involved in market research, because no matter how experienced you are, it will make you rethink how you frame questions in both qualitative and quantitative research studies and, more specifically, enable you to be a better questionnaire writer. And once you have read this book, you will probably keep it on your desk for easy reference.


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I paired these two books in one review because they both aim to help people have happier and more productive relationships in their corporate jobs. While it may seem somewhat ironic that a solo practitioner for over 50 years is reviewing these books, both books did provide interesting insights and helpful suggestions of people and work dynamics that I could apply to my practice, even as someone who works contently alone in her home office.

The first book is Get Better by Todd Davis, the chief people officer at Franklin/Covey, a global company specializing in performance improvement. Davis asserts that the nature of the relationships between people is the most significant driver of professional and personal effectiveness. In the end, he insists, it’s the relationships that create the culture that becomes an organization’s ultimate competitive advantage. Davis’ writing is clear and amusing, filled with actual stories and end-chapter summaries of its key points.

Among Davis’ 15 clear and actionable practices for improving relationships at work, seven of them resonated most strongly with me: Carry Your Own Weather; See the Tree, Not Just the Seedling; Think We, Not Me; Examine Your Real Motives; Talk Less, Listen More; Extend Trust; and Make It Safe to Tell the Truth.

The second book, by Daniel M. Cable, a social psychologist who is ranked among the top 25 most influential management scholars in the world, has a title that makes my heart sing. It’s called Alive at Work. I have always proclaimed to anyone who would listen that qualitative researchers have the best job in the world. Encouraging people to dig deep to tell their stories, while we really listen to them, and take their message to others who will change things for the better... what could be more exciting than that?

This book testifies that someone is listening to the fact that many people hate what they do for a living and dread getting up to start their work week. That is living a soul-less existence. Cable explains that the cause of all this unhappiness is actually biological. He maintains that “organizations, in an effort to routinize work and establish clear-cut performance metrics, are suppressing...the part of our brains that craves exploration and learning, and that gives us hits of dopamine when we follow its urges.” He calls this exciting process of the brain the “Seeking System.”

Cable’s book goes on with insight-producing quizzes and many fascinating anecdotes of how individuals and small groups of people all over the world managed to turn themselves and their employees into positive forces for legacy, leadership and purpose. After all, it is difficult to inspire others when you are not feeling inspired. Through promoting self-expression and encouraging experimentation, such leadership can help employees experience the impact of their work, and craft narratives about the purpose of the work they do.

Consider that it is possible to go from mind-numbing monotony to the meaningful joy of work well done. That is the premise and the practice and the potential for broader success of Alive at Work. If you know anyone who is caught in this corporate or non-corporate mind-sucking situation, buy this book, read it first, and then hand it on. ☺

“BUILDING TRUST AND RAPPORT WITH A CLIENT ALLOWS TWO-WAY FEEDBACK THAT ENCOURAGES US TO STAND BEHIND OUR RESEARCH EVEN WHEN THE NEWS IS NOT WHAT THE CLIENT HOPED TO HEAR.”

In the feast-or-famine commoditizing of today’s world of qualitative research, all 15 of these practices feel not only applicable but also essential and achievable. Qualitative researchers can be the bearers of bad news: the concepts are off message; the brand identity is weak; the campaign is misconstrued; the product doesn’t fill or create a need.

In the Extend Trust chapter of Get Better the author quotes Abraham Lincoln as saying, “If you trust, you will be disappointed occasionally, but if you mistrust, you will be miserable all the time.”

Trust the client to receive and welcome bad news to avoid future disaster is a risk, but one that we must take to stay true to ourselves in presenting the deep and heartfelt perceptions of our respondents. That’s where the chapter on Make It Safe to Tell the Truth comes in. Building trust and rapport with a client allows two-way feedback that encourages us to stand behind our research even when the news is not what the client hoped to hear. It also prompts strong and astute recommendations on our part on how the client can fix the problem(s) revealed in the research.
Aaker initially focuses on the use of signature stories as they relate to brands and corporate messaging, and his fast-paced style pulls you in. To begin, Aaker walks you through the major signature story archetypes and how they serve different purposes. Quick summaries below, of only a few of his examples, don't do justice to the well-crafted stories that Aaker tells. My summations focus on facts, while Aaker emphasizes stories that solely rely on facts weaken the power of the message because they dilute the power of well-crafted stories that inspire involvement, arouse interest, and create an emotional connection to the story’s hero. Stories only based on facts tend not to be memorable. Read the book to see the difference between Aaker’s well-crafted stories and my weaker summations below:

- **Founder story**—L.L. Bean’s focus on quality products and excellent customer service conveyed through a defining decision that the founder made. Ninety out of the first 100 waterproof boots he made leaked, but he refunded customers’ money even though it almost put him out of business.
- **Brand story**—When the Molson Hockey Rink was built in the Purcell Mountains of British Columbia, everything had to be helicoptered in. The extraordinary effort to build the rink conveyed the brand positioning “Anything for Hockey.”
- **Growth strategy story**—Elon Musk used four stories to communicate his growth strategy to investors; they played a key role in getting his funding.

I appreciated the inclusion of an epilogue that summarizes the book’s 12 key takeaways. Should I want a quick reminder or clarification of the type of story I need to achieve a specific goal, this is where I’ll turn.

Aaker also points out that the ability to create and tell a story is even more important in the increasingly digital world where stories are the main focus. So pick up and read this book and you will turbo-charge your ability to create the correct signature stories for all your needs.

“IN THIS BOOK, THE FOCUS IS NOT JUST ON STORIES, BUT SIGNATURE STORIES, THOSE THAT COMMUNICATE A STRATEGIC MESSAGE THAT IS RELEVANT TO THE BRAND VISION, THE CUSTOMER RELATIONSHIP, THE ORGANIZATION, AND ITS VALUES AND/OR THE BUSINESS STRATEGY... A TACTICAL STORY IS USED TO ACHIEVE A SHORT-TERM COMMUNICATION OBJECTIVE, PERHAPS IN AN ADVERTISEMENT OR ON A WEBSITE. THERE IS NO EXPECTATION THAT THE STORY WILL LIVE BEYOND ITS COMMUNICATION TASK.”
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