DO WE STILL NEED HUMANS TO DO QUALITATIVE RESEARCH?

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Michael Carlon interviews Randy Scher of iPowering Motivation about the practical applications of hypnosis in qualitative marketing research.

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BOOK REVIEW: Presence expands on author Amy Cuddy’s widely-watched TED Talk to explore the research behind behaviors and attitudes that contribute to a feeling of power and success.

BOOK REVIEW: Doing Qualitative Research Online educates scholar-practitioners and researchers new to online qualitative research about designing and conducting studies via a how-to framework grounded in academic theories.

BOOK REVIEW: Copy, Copy, Copy: How to Do Smarter Marketing by Using Other People’s Ideas, by Mark Earles promotes the non-politically-correct premise that copying ideas is what we all should be doing more.

BOOK REVIEW: Richard Thaler is uniquely qualified to write the definitive history of behavioral economics. Misbehaving: The Making of Behavioral Economics provides new insights even to those who feel they already know all they need to know about behavioral economics.

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Thank you for being a reader of QRCA VIEWS. As one of our readers, you belong to a diverse group that represents key leaders and practitioners across our entire qualitative research industry. Do you know the company you keep?

QRCA VIEWS readers obviously include QRCA members, who are a diverse group unto themselves, but our reader base extends much further across the qualitative research field—non-member practitioners, client research practitioners, client executives charged with responsibilities in marketing and strategy and insights, focus facility personnel, recruiters, transcriptionists, academics, students, and more.

We try to ensure that every page of this magazine is relevant for all of our diverse readers, who have far more in common despite your particular employer or business structure. For simplicity, sometimes in the magazine we refer to “researchers” distinct from “clients.” In this context we consider all of our readers to be among the “researchers.” Even researchers who work on the client side of the business have internal clients, perhaps their company has client audiences for their research, and these client-side researchers face the same skill sets, challenges, and industry interests as do independent qualitative research consultants and providers. These are some of the important qualities you all share that bring you together to be “our readers.” We are proud to serve and enlighten every one of you, with every issue of QRCA VIEWS.

And this issue is no exception!

For our cover story Cynthia W. Jacobs looks at the use of social media in qualitative research in our Online Qual column, exploring the tools available today for social media listening and highlighting their limitations, concluding that humans are still very much needed as part of this process. We delve further into social media in qualitative research in our Schools of Thought column, where Jennifer Golbeck reveals ways that social media can be used to conduct qualitative research that uncovers surprising and unexpected insights that you never would have thought possible.

In Business Matters, Holly J. Kile points out that every business is prone to leaking money and shows you how to plug the leaks you already have and keep new ones from forming. Jurie Smit takes us on a wild ride in our Global column through the pitfalls and challenges encountered in the unpredictable world of conducting qualitative research in Africa.

For our Trends column, Shaili Bhatt shares how today’s Wi-Fi bandwidth enables live video streaming of what used to be called shop-along research, allowing clients to virtually tag along and participate in the moment. And in Travel Wise, Deanna Manfredi gleans some crucial tips from travel industry experts to help travelers navigate changes in rewards programs to get the most out of their hard-earned points.

Our Toolbox feature again scores a triple play with three great articles: Jenny Brandt presents best practices for video capture of in-home and onsite qualitative interviews. Gert Garman makes the case for utilizing connected immersive experiences that put respondents closer to the emotional essence of key experiences for deeper qualitative insights. Then, Jonathan Podolsky and Paul Kahn explain their human experience approach to design and the qualitative research techniques that inform this process.

In Book Reviews, Robin Wedewer shows how Harvard psychologist Amy Cuddy expands on her original ideas on body language in Presence: Bringing Your Boldest Self to Your Biggest Challenges, which explores her concept of “presence” that one can feel inwardly and project outwardly. Shannon Danzy provides a look at Doing Qualitative Research Online, which helps to educate researchers about online qual by providing a background on the methodologies, methods and ethics, as well as a how-to framework. Susan Fader offers a pair of reviews, first of Copy, Copy, Copy: How to Do Smarter Marketing by Using Other People’s Ideas, which argues that copying from the work of other people is often the better approach, rather than trying to come up with something unique and original, and then shows how there still is a lot to learn about behavioral economics, as is revealed in Misbehaving: The Making of Behavioral Economics.

And don’t forget to listen to our Podcast, this issue featuring Randy Scher of iPowering Motivation about the use of hypnosis in qualitative research for deeper insights.
All market research is basically an effort to get at the truth. What do people like? What do they respond to? What is the truth? But getting at that truth is not always easy. It matters a lot who does the asking, how they go about it, and more, how they deal with both respondents and clients.

We’ve been a leader in market research for decades because we are committed professionals with the tools, and experience to do it right. And that’s the truth.
Iconic Origins

Before Roku, Spotify, iTunes, YouTube, or Netflix, there were just two electronic media entertainment sources: radio and television. Before Air Jordans, Shape Ups, and Skechers, there were Converse All Stars and Keds. And, in our own industry, before mobile, immersive, MROCs, or usability testing, there were face-to-face focus groups and in-depth interviews.

Despite the great differences and advancements in each of these categories—electronic entertainment, athletic footwear, and qualitative research—none have lost their iconic origins. In a recent report by California State University, Northridge found that the average number of TV sets per American household is 2.24, down slightly in the last five years in favor of mobile device streaming. And, have you ever been in a car that did not have a radio? Probably not, but if you purchased that car in the last five years, chances are it is Bluetooth enabled. Checking the Converse website and searching “Chuck Taylor All Star™,” I found more than 400 variations in styles and colors; this choice of options has made the classic basketball shoe famous for nearly 100 years.

So true is this evolution for the qualitative market research industry. Advancements and innovations are ongoing. Visionaries work among us. Yet, this does not mean the foundational methods are expiring. If you take a close look at any of the more recent methodologies and technologies, you will see their roots are still based in a solid recipe of skilled moderators asking the right questions in a way that welcomes participants to be candid. Evolution in our industry does not necessarily leave the foundational methods by the roadside; rather, it builds solidly upon their foundation. Iconic qualitative research methods will always have an important place in our repertoire, while innovative methods open opportunities for us to be more inventive and valuable to the companies we serve.

QRCA can play an important part in helping you become more innovative—by exposing you to a variety of new ideas and the researchers who are passionate about them. QRCA members offer the balance of experience in the new and innovative with the real foundational science that the “new” and “revolutionary” is built upon.
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What Social Media Holds for the Future of Qualitative Research
People share a lot on social media, both intentionally and otherwise. They post some things directly, and other information can be inferred from their profiles and activities. Taken together, social media can provide a treasure trove of data, but how reliable is this information and how can it be used?

Social media holds promising implications for the future of qualitative research…but maybe not in the way you think. Let’s take a look at the scope, veracity, and usefulness of this data for qualitative researchers.

Scope
You undoubtedly know that social media is huge. But just how big is it? Facebook alone has 1.6 billion users. That’s more than 50% of the world’s Internet-connected population. In the U.S. alone, nearly 75% of Americans with Internet access have Facebook accounts (Pew Research Center, Mobile Messaging and Social Media 2015). Twitter has over 300 million users. LinkedIn has over 400 million. And YouTube reports it has over a billion.

It’s not just young people, either. Among people older than 65 years, social media use has tripled in the last five years (to around 35%) and continues to rise.

When people use these sites, they share massive amounts of data. On YouTube, for example, people upload 500 hours of video every minute (nearly 21 days’ worth of what are probably mostly cat and baby videos). Twitter receives 500 million tweets each day. And in all this interaction, people are sharing a vast amount of information about themselves—intentionally and unintentionally.

The information on social media is more than what people had for lunch or selfies at the gym. People say plenty about their preferences and behaviors as well. They rant. They share. They state opinions. Demographic and behavioral information often comes through quite clearly. You can determine age, gender, sexual orientation, race, religion, politics, marital and parenthood status, income, and more just based on their online activities. In aggregate, you can also develop deeper pictures about people’s hobbies, work, and habits. If you look long enough at the right data, you can even learn people’s daily routines.

Beyond what users share explicitly, new computer science algorithms are making it possible to discover a disturbingly wide range of personal information—even when people have chosen to keep it private. This includes demographic information, such as age, race, religion, sexual orientation, gender, and marital status…but it goes deeper.

Research has shown we can discover people’s political preferences, personality traits, intelligence level, and drug and alcohol habits. Recent work is even showing that we can predict people’s futures, like the probability that their current relationship will last or if a pregnant woman is likely to develop postpartum depression.

These things aren’t determined by analyzing obvious clues in people’s online profiles (e.g. we don’t guess that someone is politically conservative by checking to see if they follow the GOP online, although that’s a good guess). Rather, computer scientists look at individuals in the context of thousands—or millions—of other people at a time and build statistical models that predict these traits with high accuracy. In my lab, we’ve built tools that infer people’s personality traits, political preferences, coping styles, and more. This technology is poised to move out of academic research labs and into the hands of anyone who wants it within the next few years. With such an embarrassment of data riches...
Getting Started with **ALGORITHMS**

They are mostly in the research lab right now, but there’s one commercial tool called Crystal Knows. It is a plug-in that gives you a personality profile of the person you’re e-mailing based on their e-mail address, gives advice on how to craft an e-mail they will like, and then actually edits your message, sentence-by-sentence, to make it more appealing. It’s a sign of how this technology will be available. You don’t go collect all the data and make inferences yourself. Instead, companies will make different inferences available in contexts where they make sense. Crystal Knows builds all its profiles off of social media. While the e-mail piece is interesting, the relevant points from this example are: (1) these algorithms are already working on your social media data and the results are being sold, and (2) you can use it yourself to get profiles of people, even if you don’t e-mail them.

publicly accessible on social media websites and through APIs (application program interfaces), the time of small, representative samples is declining; the time of endlessly improving analysis algorithms and techniques is here.

One of the most interesting (and creepy) things about these algorithms is that they don’t make their predictions based on logical connections. Often, the strongest indicators of a trait make no logical sense. For example, one study analyzed people’s Facebook likes to predict many of these attributes, including intelligence. The researchers listed which likes were the strongest indicators of high intelligence. The top four were the pages for Science, Thunderstorms, The Colbert Report, and Curly Fries. Why Curly Fries? It’s not that liking fries makes you smart. Instead, this is a statistical pattern that emerged from a huge amount of data and is typical of the strange connections that exist (to learn more, check out my TED Talk at qrca.org/VIEWS-014).

Of course, a good qualitative researcher never relies on these correlations. Computer scientists just want to predict people’s attributes; both the connections between attributes and the data we collect can change, and they often only apply to small parts of the population. The predictions, however—like predicting if someone is smart—are generally quite accurate when correlations are high and can be useful in your research.

**Veracity**

How reliable are social media data? We should break this down into two parts:
- How reliable are the data people put online in the first place?
- How accurate are the algorithms that give us new insights?

While it’s normal to assume people are stretching the truth online (sharing exaggerations of their fabulous lives and so on), research shows people tend to be pretty honest and reveal their true personalities on social media, not idealized versions of themselves. An article in *Psychological Science* (2010) by Mitja D. Back, et al., focuses on this research, stating “Facebook profiles reflect actual personality, not self-idealization.” And while people may adjust their behavior for a more public sphere, they tend to share their true likes, feelings, and personal information (the only notable exception is age, especially among younger users who may have to lie about their age to gain access to a site).

And what about the algorithmic inferences? They tend to be right about 80% of the time, give or take. That’s pretty good for a computer, and a mostly-right guess can be really helpful, especially when you have no other clues about that attribute for a person. Still, the non-negligible chance of being wrong means learning how to treat this information is an important skill.

**Usefulness**

Fortunately, we all are actually quite familiar with these systems...albeit in a slightly different form. If you’re a Netflix user, you know that when you log in, Netflix provides you with a list of recommended shows. Similarly, Amazon will recommend products based on other things you’ve bought. Music services like Pandora recommend songs based on your tastes. Although these “feel” different, the underlying algorithms are almost exactly the same as those that discover personal attributes from social media. Instead of saying “you look like a conservative” or “you look like an extrovert,” they say “you look like someone who would enjoy watching Ghostbusters.”

And we know how to handle these technologies. You probably don’t sit down and watch every show that Netflix recommends in order. You don’t buy everything Amazon suggests. You integrate these recommendations with your existing knowledge to make a decision.

We also know how to think about the accuracy of those results. Most of the time, they are correct, but boring and not insightful. Did you watch a zombie movie? Well, get ready for recommendations for its two sequels and three other zombie movies you’ve already seen. Other times, the recommendations are way off. But when they are at their best, they introduce you to things that you never would have known about or dis-
Beyond what users share explicitly, new computer science algorithms are making it possible to discover a disturbingly wide range of personal information—even when people have chosen to keep it private.

covered but are exactly what you are looking for.
So it is with social media: both the insights derived from algorithms and the data people have shared directly. Most of the time, you will find support for what you already know or will see accurate but irrelevant information. Sometimes, the algorithms’ conclusions or what people have posted themselves will be misleading. But, sometimes, you get the best case: you learn something you never would have discovered otherwise. This is the true promise of working with social media.

This all has implications for qualitative researchers, but it likely will enhance, rather than replace, most of the techniques you already use. At its heart, qualitative research strives to understand people’s behaviors and perceptions by understanding the reasons behind them. Through social media—either directly or via algorithmic inferences—you get information about some behaviors and perceptions, but you cannot get at the underlying reasons. If people do state reasons, they are unlikely to be representative of your target audience. Obviously, you also lose the dynamics of a focus group, where people build on one another’s ideas, where you can ask questions to probe preferences, and where you get a fuller understanding of people’s feelings.

But it can be helpful! Social media can help you find what people are saying about a particular topic and guide you when developing topics and questions for your focus groups. Algorithmic inferences can help you identify behaviors (or future behaviors) of your target group, which may help you to segment the groups more finely. For one-on-one interviews, previewing a subject’s social media profile (with their permission!) can also provide background and guidance for your discussion. Social media is not a perfect oracle of truth, but it is an invaluable tool that nicely complements the ones you already have.

Up Your Game – Apply for the QRCA Young Professionals Grant Today!

Individuals age 35 years or younger are invited to apply for the grant. Up to 10 enthusiastic young qualitative research professionals will be awarded this opportunity.

The grant includes full registration fees to attend QRCA’s annual conference in Los Angeles, California, January 18-20, 2017. Attend any of the 30+ sessions, gala, networking events, and some meals—value up to US $1200.

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Context Is Everything

It’s a funny thing, focus groups by candlelight—that undercurrent of excitement, the hint of illicit complicity in sitting around a table in a dark room with a bunch of strangers. The spooky, flickering shadows add to the feeling that you could be at a Victorian séance or a meeting of collaborators getting up to no good.

On the other hand, it could be just another focus group in Africa, where some hapless government hasn’t sorted out its energy supply-and-demand issues and suddenly one has to “make a plan,” as they say.

When international colleagues talk about the latest technology and social media in conducting qualitative research, I tend to go into an out-of-body experience or “mild dissociative fugue,” a fun coping mechanism I picked up whenever out of my depth in an “I-just-can’t-believe-this-is-happening” situation on some of my more unusual African research adventures. Little wonder that my mind feels the need to run off in search of some mental comfort in my more basic world of qualitative research, where life is simpler and “social media” has a different contextual meaning.

Adventure Boots Required

Years ago a friend taught me a really useful attitudinal readjustment of looking at life’s more complicated missions. He always asked if I had my “Adventure Boots” on, prior to embarking. This image of putting on my Adventure Boots...
By Jurie Smit
- Owner/Director, Research
- Cross Cultural Insights
- Cape Town, South Africa
- jurie@crossculturalinsights.com

It was a good day because rumor had it that both the plane and the pilot “showed up” and, so, as we stood idly on the runway shoulder waiting to board, both the pilot and co-pilot sauntered by. The pilot was young, giving off the impression that he was either hung-over or still drunk. The older co-pilot seemed world-worn and disillusioned. Both came across as decidedly not living the career dreams they had hoped for. As for the plane, well, it somehow also looked hung-over and world-worn, like a combination of both men. We were eventually seated, and if you had a seat belt that worked, you put it on, and if your tray table could be placed in the upright position, you prayed it would stay there. I was unusually attentive to the demonstration of the safety instructions, hanging on the lips of the perky and enthusiastic flight attendants who were happy to fly for a change.

As we came to the “should the cabin pressure drop, an oxygen mask...” part of their speech, the pilot decided he had places to go and things to do and, without as much as a “flight attendants, take your seats for takeoff,” he floored the engines and roared down the runway. Well, it is true what they say about loose luggage in a cabin during takeoff and landing; it sure can shift position rather

when dealing with the vagaries of obscure African research has helped me cope mentally in some of the strange, even bizarre, situations I find myself in.

Adventure Boots are all about adaptive attitude, so put on your Adventure Boots, switch to “adaptive mode” on your tablet, and put your mobile phone on roaming as I take you on your own personal African Research safari!

First, you have to check all your pre-conceived baggage and take along only flexible hand luggage on your trip. Heading to Zimbabwe, an “Adventure Boots and Flexible Hand Luggage Only” sign would have been just the thing to have at the boarding gate for the flight from Harare to Bulawayo. The status of that flight should be listed on airline schedules as “du jour” as it tends to be determined on the day whether the flight actually operates or not; hence, you show up at the airport and wait to see whether the flight materializes.
quickly if not secured. The colloquial use of “Scare-o Zimbabwe” instead of “Aero Zimbabwe” suddenly made a lot of sense!

Accommodations Certainly Vary!

And what about the highly unpredictable world of African accommodations? It can surprise you when you least expect it, like the little bed-and-breakfast place in Beira, Mozambique. In a world of chaos there was this very clean, modern little gem only two blocks away from the warm Indian Ocean, sporting miles of clean, golden, quiet beaches. This posed a stark contrast to Accra, Ghana, where I gave up on the beach after seeing the raw sewage pipe from the city running into the ocean. That, along with a kid trying to sell me a baby python wrapped around his arm for $2, was enough for me. Funny that, other than “pot luck,” the two things that come to mind when thinking of African accommodations are water and prostitutes—both freely available, but not safe for travellers.

As far as tap water is concerned, simply do not drink it once you leave the triumvirate of South Africa, Namibia, and Botswana—at least if you want to stay focussed during your focus groups. Do not have the salad at the hotel, where the ingredients have likely been washed under the tap. Use warm Coke instead of tap water when brushing and rinsing your teeth.

And What about Venues?

Venues present another real kicker when it comes to doing research in developing African countries, as there are virtually no dedicated research facilities in most of these countries. Outside South Africa, you can pretty much forget about a one-way mirror, slick venue hostesses, and air-conditioned viewing rooms where studious, rapt clients can tap away at their laptops while occasionally sipping their vitaminwater®.

With Adventure Boots on, however, it can be really fun if you pretend you are on a TV makeover show with a deadline and a live audience. This, while rushing around in an attempt to convert whatever space you get handed into a workable facility while the locals stand by watching you. Bad cabling and erratic monitors come to mind automatically, as the viewing room is always somewhere else when dealing with even a best-case scenario. An okay-case scenario entails running the group in a dilapidated room with no electricity, with the client sitting on a chair outside the half-broken door, trying to listen to the discussion. Then you have Nampula, Mozambique, where the “audio visually equipped facility” was some half-abandoned community hall with a plug, in case you had randomly thought to bring your own TV/AV equipment. Here, “translating facilities” meant I had to sit slightly behind the moderator, with the translator whispering the French to English translation of the discussion into my ear.

Once on a project in Harare, I was minding my own business and running focus groups in a very, very seedy hotel. The bright entrepreneur organizing my logistics in Zimbabwe figured that, since the hotel rented rooms by the hour, it made good financial sense to run focus groups in tandem with the working girls’ activities. He regarded it as a Win-Win-Win situation because the hotel won business, the working girls had a source of potential clients parade past on their way to and from the groups, and we did not have to pay full-day venue fees.

Having operated in this setting for a day or so, everyone pretty much knew my name as I was the only foreigner in a 30-block radius. Since I appeared to be working, I was regarded as one of the clan. Being consummate professionals, “the girls” never asked about my taking six people at a time into my room, closing the door and coming out two hours later looking exhausted. Add to that the fact that someone was watching the proceedings from the room next door on a TV monitor with bad cabling, and they probably just thought, “to each his own.”

On one particular day, two of the girls, Chocolate and Satisfaction, and I were making pleasant small talk while waiting for the elevator which only went to the fifth floor, leading onto a narrow “stairway to heaven” straight up to the sixth floor, where I had a group of respondents

“There is usually so much happening not related to the actual moderator-respondent interaction that clients end up being a bit vague about what actually occurred during their focus groups in Africa.”
waiting for me. Once inside the elevator, we pressed the buttons for our respective floors and made it to the “third and a half” floor. Not the Harry Potter “half,” the Zimbabwean “half.” So there we were—Chocolate, Satisfaction and me—stuck in an elevator in Africa. Fortunately, the story has a happy ending as, about an hour and a half later, one of their pimps got worried and started looking for them. As for my respondents, they thought the wait was just part of the qualitative research process.

And What about Clients?
I tell clients to just relax, breathe deeply, look pleased, and remember that they chose to attend off-the-beaten-path research. They should repeat that to themselves over and over as they get to their venue, such as the one in Zambia where the bathroom was an open pit in the back, and “audio-visual” entailed a video camera that only worked if one of the respondents ensured that the red and blue wires were connecting at the open socket in the wall while trying not to electrocute himself amid power cuts.

A particularly memorable venue was the one where water dripped mysteriously from the ceiling—right next to the plug points that had so many things plugged into them. It was a wonder that the client came out of that room alive. Oddly, some clients seem a bit “put out” in environs where they end up sitting in a poorly lit little storage room with open wires connecting the TV monitor to an adjacent room.

On the upside, clients are usually so traumatized by their experiences that the actual research does not have that under-the-microscope feeling you get in the developed world. There is usually so much happening not related to the actual moderator-respondent interaction that clients end up being a bit vague about what actually occurred during their focus groups in Africa.

And What about Respondents?
The greatest pleasure in these highly non-traditional research locations comes from the respondents. As a rule, they are enthusiastic, unjaded, sharing, caring, and very open-minded. A practical tip: if your personality might not be up to scratch, dressing well may be your only saving grace in terms of social entrance and acceptance into the group setting. These adventures have led me to believe that I must have a great personality because I certainly don’t appear to dress well according to my respondents. I have been told on many occasions during my sessions in Africa how badly I dress, or that my shoes are too casual for my dress shirt, or that I really shouldn’t wear red.

Not only have I received continual fashion advice over the years from African respondents, but my grooming has also been analyzed in detail by various well-meaning ones. On one occasion, a respondent solemnly interrupted the discussion, telling me how badly my hair was cut and that, in the future, I should come to his salon if I wanted to “look better.” This was confirmed by the group with many nods and assenting “yes, that’s true” from the others. Harsh words for a researcher with a bad haircut, but it is this open sharing and enthusiasm that has made all the unpredictable flights, the eclectic assortment of venues, taxing accommodations, and dubious characters I’ve encountered worth my while as an Adventure Boot Explorer in Africa.
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Getting the Most out of Your

Frequent Traveler Points
In *On Points*, Brian Kelly, the founder of The Points Guy, shares his strategies for getting the most out of your points and miles. Airline and hotel mergers, changes to loyalty programs, and bountiful new credit card opportunities have created a dramatically different landscape for frequent travelers in 2016. The following are three things you should keep in mind to make the most of your points this year.

**Spend Your Points before They Are Devalued**

Miles and points lose value over time as airlines and hotels increase the amount of miles/points needed for flight and room rewards. It's important not to hoard your rewards, especially this year. In 2016, there will be a huge American Airlines devaluation due to its merger with US Airways back in 2015. The amount of miles required for many awards will increase dramatically, in some cases almost doubling. The most impacted routes will be first-class flights to South Asia on partners such as Cathay Pacific or Japan Airlines, business and first-class flights to Australia on Qantas, and all domestic transcontinental business and first-class flights.
You shouldn’t hoard your hotel points either. Starwood Preferred Guest members, in particular, may want to think about redeeming since Marriott’s acquisition of Starwood means the two loyalty programs likely will merge. Most travel insiders believe the value of SPG points, now worth dramatically more than Marriott points, will plummet as a result. No details have been announced, but changes are undoubtedly coming at some point.

Decide if Your Loyalty Program Is Still the Right Fit for You

Airline reward programs have changed dramatically over the last few years. You may want to shift allegiances, too, particularly if you’re a budget-conscious traveler. Airline mergers have reduced the amount of competition, resulting in fuller planes and more and higher fees. As a result, flyers with elite status have seen their perks eroded. But perhaps the biggest change has been the shift to awarding elite status based on how much you spend, not how far you fly. United and Delta adopted this policy in 2015, and American will follow suit in the second half of 2016. If you routinely purchase cheap fares, particularly on international tickets, you’ll likely be earning far fewer miles. Here’s how to fight back:

• International travelers should consider using low-cost carriers like Norwegian and Wow Air. Though their loyalty programs are lackluster, the amount you can save in airfare more than makes up for it, and the major carriers are giving you a pit- tance in miles anyway.

• Not inclined to switch carriers? You don’t necessarily have to bank your miles with the airline you fly. Alaska Airlines is one of the few remaining carriers that awards miles based on distance flown, so you can fly on American but earn Alaska miles, then redeem those miles on partners such as Emirates or Air France.

• If you’re concerned about starting from scratch building loyalty with another airline, be aware that most have status match programs that allow you to transfer your current elite status from a competitor or fast-track to a similar status level.

Rethink Your Credit Card Routine

2015 was a blockbuster year for credit card travel rewards. There were huge sign-on bonuses, and Chase increased its popular Sapphire Preferred bonus from 40,000 points to 50,000 which is worth at least $625 toward travel. More cards also hit the market, with relative newcomers to the premium travel world, including Citi and Barclaycard, competing with the likes of Chase and American Express.

This all means there are more opportunities than ever to get the most out of your credit-card spending. Here are some of the most lucrative credit cards in the travel space (as of this writing):

• American Express Premier Rewards Gold: Offers 3x points on airfare, 2x on gas, groceries, and dining. The $195 annual fee is waived the first year.

• Chase Sapphire Preferred: Offers 2x points on travel and dining. The card has a $95 annual fee, waived the first year.

• Citi Thank You Premier: Gives 3x points on travel and gas, 2x on dining. The $95 annual fee is waived the first year.

Airline credit cards can also make sense, if only for avoiding baggage fees. U.S. airlines earned nearly $4 billion in baggage fees in 2015. You can avoid contributing to this windfall for the airlines by maintaining elite status or getting a co-branded credit card.

The Best Times to Use Miles Instead of Cash

Just because you’re sitting on a ton of frequent flyer miles doesn’t mean you should always use them. Here are a few tips to keep in mind when deciding whether it makes more sense to dip into those hard-earned frequent-flyer miles or just pay cash. Four situations when it’s a better deal to use your miles (courtesy of Zach Honig, Editor in Chief at The Points Guy, for Travelzoo):

1) When You’re Booking a Last-Minute Domestic Flight

Typically domestic airfares are cheap enough that it doesn’t make sense to redeem 25,000 (or more) miles for a roundtrip flight, but if you need to book a flight a day or two (or even just a few hours) before you travel, redeeming miles can save you a lot on last-minute airfare. Airlines also tend to open up more award seats at the last minute, especially if a flight is not very full, even though you may not find a cheap cash fare when there are lots of open seats.

2) When You’re Booking International Business or First Class

Many people don’t realize you can redeem miles from a U.S. airline’s program to fly on an international partner (where you almost always will find more comfortable seats, better food, and superior customer service).

3) When the Airline Doesn’t Add Fuel Surcharges

Some airlines, most notably British Airways, add huge fuel surcharges to award tickets. So in addition to the tens of thousands of miles you’ll redeem for an economy flight, you’ll have to pay hundreds of dollars in additional fees. Sometimes you’ll pay nearly as much in surcharges as you would on an entire paid ticket. Save your miles for airlines that don’t add huge surcharges.

4) When You’re Not Sure You’ll Actually Be Able to Fly

One of the greatest advantages of redeeming miles for a flight is that you can usually change or cancel the trip entirely for a relatively low fee. Elite frequent flyers can sometimes even do it for free. And if you cancel your award, you’ll usually get your miles back. If you cancel a nonrefundable paid flight, however, you’re probably out of luck for any kind of refund.
If You Fly Southwest Airlines, Be Sure to Look into the Companion Pass

Those of us who have flown with Southwest Airlines know it is a little different from other U.S. airlines. For example, it’s the only U.S. airline that still gives passengers two free checked bags on all fares, and it doesn’t charge fees for flight changes or cancellations. But the biggest difference may be its loyalty program, Rapid Rewards. It’s typical in a lot of ways—as with JetBlue and Virgin America, you can redeem points for any flight. Like United and Delta, Southwest gives you points depending on how much you spend.

But Southwest also offers one of the most powerful perks in existence, if you know how to get it and use it: the Companion Pass. As Brian Kelly explained to Travel + Leisure, this isn’t your typical companion pass, which can be redeemed once for a “free” ticket (usually with additional fees and scant seat availability). The Southwest Companion Pass is much, much more valuable. Southwest’s Companion Pass is a semi-elite status; when you fly 100 flights or accrue 110,000 Companion Pass Qualifying Points in a calendar year, you achieve Companion Pass Status. You don’t have to trade in the miles for status—you get it in addition to the points.

That means you can take a designated companion with you whenever you buy or use points for a Southwest ticket, paying only nominal government fees. And the status is good for the whole year that you qualify and the following year. So the earlier you get your Companion Pass in a calendar year, the more time you have to maximize it. For example, if you qualify on February 15, 2017, it will be valid until December 31, 2018.

You don’t even need to set foot on a plane to earn those 110,000 Companion Pass Qualifying Points: you can do it by signing up for a Southwest credit card from Chase. The sign-up bonus (which is currently 50,000 points) counts toward pass status. And if you have a small business, you can also get the business version of the card; after you spend $2,000 on each card to get your bonus, you end up at 104,000 points. You then only need to charge $6,000 more to get the Companion Pass, since every dollar spent on the credit card earns one qualifying point.

You also can reach Companion Pass status by transferring hotel points to Southwest. While you usually don’t get a great exchange rate when transferring hotel points to airlines, in this case there is a fantastic option. With Marriott’s Hotel + Air packages, you can redeem hotel points for seven nights at a hotel, bundled with airline miles from carriers that include Southwest. The Southwest packages start at just 270,000 Marriott points for a week at a category 1-5 hotel and 120,000 Southwest points, which is more than enough for Companion Pass status. Once you complete this redemption by calling Marriott and the points hit your Southwest account, you’ll get Companion Pass status.

Other things you should know about the Southwest Companion Pass:
- You can add your companion on to any ticket, even if your company purchases it.
- Companions can be added to all Southwest-operated flights, including new international routes to places like Aruba and Costa Rica.
- Companions don’t have to fly with you on every part of your journey—if you’re flying roundtrip and need to leave on a business trip, your companion doesn’t have to return with you. However, they do have to fly with you to get the flight for free. You can’t book a flight for you and a companion and then cancel your ticket.
- You can change your companion up to three times during the validity of your Companion Pass. Just be aware that each time you add a new companion, all existing reservations with your old companion will be invalidated.

I hope this article has inspired you to re-think how you earn and redeem your hard-earned frequent traveler points. Whether you love or hate traveling for business, following these tips can help make those business trips as rewarding as possible. Happy travels!

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TIME TO CALL THE PLUMBER: Ten Places to Plug Money Leaks in Your Business
Running a business can be a challenge. If you're flying solo, you are the chief, cook, and bottle washer, responsible for everything from providing your unique service to your clients to paying the bills to making coffee. If you have a team you may have help, but you are still responsible as the captain of the ship to make sure everything happens as it should. No matter the size of your team, you are the one to keep an eye on your bottom line. You already know that you have to track revenue and expenses, but it's the money that leaks from your business that can sneak up on you.

You might think money leaks happen only when a business is failing. Not true—leaks that happen while a business is failing are more of a flood, capable of sinking your ship. The truth is, most money leaks happen when a business is experiencing growth, not when it's failing. When your business is growing, you are generally busier and thus more focused on getting the basics taken care of in order to just keep up with the demand associated with your work. It's easy in these times to overlook the signs that money is leaking from your business.

To plug the leaks you already have and keep new ones from forming, here are ten areas in your business predisposed to leak valuable revenue. The first two areas relate to your outgoing business expenses.

1. **Review your automatic subscriptions.** This is one of the most common locations for hidden money leaks. For convenience, we often choose automatic billing. This service is certainly great to ensure that your subscription stays active. You may even save some money by paying annually in advance. Unfortunately, when these subscriptions are on automatic, we can forget about them. Take some time to go through your bank and card statements and look for any recurring subscription payments (don't forget those annual ones!). Look for services you no longer use and cancel them. It might be an app you don't use or a magazine that you don't have time to read or doesn't have information interesting or pertinent to you any longer. Also look for any services or subscriptions that perform the same functions. For example, you may be paying for two services that act as your CRM (Customer Relationship Management) or programs that manage your sales pipeline. You definitely don't need to pay for multiple services that do the same function.

2. **Review all of your expenses, paying close attention to extra fees, interest, and “soft costs.”** In addition to combing through your bank records for subscriptions, you want to look at all of your expenses to identify any hidden charges, fees, and interest you may be incurring. Regular expenses like utilities and bank fees can creep up over time in a way we rarely notice. Also, make sure your credit card processing fees and interest are what you agreed to with your initial contract. Review your loan statements and check for any anomalies. Even little increases can have a dramatic impact on your bottom line over time. And while you are checking your expenses, also look for “soft costs”—those unnecessary expenses that are often justified as “an expense for business” but aren't supporting in a measurable way the delivery or quality of your product. You will want to keep a rein on those. Just because you can justify an expense “for the business” does not mean it is absolutely necessary. In other words, you may love those fancy file folders or snazzy ink pens, but those cute office supplies add a lot of unnecessary expense, ultimately chipping away at your business profit.

The third and fourth areas where you may be leaking valuable revenue relate to your day-to-day activities and specifically where you may be failing to optimize your time.

3. **Review your daily activities.** We've all heard the phrase “Time is money,” right? Wasted time is a money leak. Spend some time digging into your daily routine. Notice if you are spending a lot of time on non-revenue-producing functions. When you are spending your time on things that don't make you money, you are taking time away from being able to do things that do boost your bottom line. Track your activities for several days—be as detailed as possible—and analyze which functions you can take off your plate. Delegate these tasks to an assistant or outsource them in another way. Yes, this action might have a cost to go with it, but you will more than make up for it when you can shift your focus to the service you provide for your clients.

4. **Complete a systems check.** Your systems, or processes, are a way to ensure you are doing everything as efficiently as possible. Unnecessary extra steps cost you time and money. Take the time to go through each system in your business. Be careful to look for missing steps. Many businesses, for example, spend time creating great sales copy but forget to include a call to action (or their call to action is weak). Check for pieces of the process that aren't working properly. Test your opt-in process. Does it work the way it should? Look for any outdated processes. If it's taking too much time or costing more than it should, it's time to plug your systems leak.

The other six areas in your business where you could be leaking money relate to your lead generation and business development processes.
5. Review your website. Leaking money isn’t always about money you’re spending. Sometimes, it’s about lost opportunity. Your website can be a huge wasteland of lost opportunity if you aren’t careful. Make sure your website clearly defines what you do, identifies who you serve, and outlines clearly how you help your clients. If a potential client is not sure how you can help them, they are more likely to keep searching than to stop and ask you questions. You also will want to make sure it’s clear and simple for website visitors to contact you. Don’t just rely on an email contact form; such forms are notorious for not always working properly, so always provide alternative ways for people to connect with you.

6. Review all your content. Beyond your website, make some time to review the other content you generate. This includes your blogs, social media, newsletters, and any other marketing material you have. Does your content support your brand? Does it help people to easily stay connected with you? Is it clear what you do and how you do it and, more importantly, how you do you can help solve your clients’ problems? Confused people DON’T buy, so your content must be completely clear or else your potential clients will move on to someone else.

7. Check your visibility. With today’s technology, you can be virtually anywhere. Social media, websites, and advertising opportunities alone afford us the ability to get our message out to massive numbers of potential clients. Unfortunately, many small business owners and solo entrepreneurs don’t take the time to truly target their specific audience, so they end up wasting a lot of time and money on ineffective visibility tactics. Make sure your marketing is targeted, and then gather and analyze highly specific metrics on a regular basis to ensure your message is getting to the right people. Don’t make the mistake of thinking that if you cast a wide net that you’ll likely catch more. The opposite is true. The narrower your focus, the more likely you are to be successful.

8. Evaluate your sales funnel. If you are like many business owners, you hear the words “sales funnel” and your eyes glaze over. It sounds complicated, but it’s really nothing more than a relationship-building process that you lead prospects through to move them to a purchasing decision. A broken or confusing sales pipeline can cause massive money leaks for your business. Make sure you have a clearly defined path for prospects to travel through. Prospects and clients should always be able to easily identify the next step to working with you.

Along with a clearly defined path, you will want to make sure each phase of the customer cycle makes sense. For example, don’t expect someone who came into your funnel from a free white paper to immediately jump into spending thousands of dollars. Expecting them to make that leap is not realistic and could potentially lose them altogether. When it comes to new leads, make certain you have a process for following up. You certainly don’t want to lose out on potential revenue just because you are not adequately following up.

9. Follow up and reconnect. Many of us miss revenue opportunities simply in our lack of consistent follow-up. Think about the last networking event you attended. Did you get business cards? Have you followed up with everyone? Did you have some “catch me later” follow-ups that have fallen through the cracks? One of the best things you can do is to plug those new contacts right into your CRM (Customer Relationship Management) system and put new contacts into an established follow-up workflow. Put it on autopilot.

One other place we lose money with our community is in lost connections. Take some time to go through your database of people you already know. Who do you already know that would make an ideal strategic partner? What other alliances would make sense for you? Use those to start creating new, meaningful relationships to build business. Also, don’t forget to ask for referrals! Clients who are happy with your work often are more than willing to share you with their friends if you just ask. And, more than likely, those folks would much rather have work done by someone recommended to them by a personal friend than contract with a stranger. Don’t leave money on the table just because you are not staying connected with your entire network.

10. Review your pricing. Sometimes money leaks in a business are simply the result of outdated pricing models. This holds true for both overpricing and underpricing. Make sure you do regular research on market trends, but also don’t underestimate the value of your unique position in the marketplace.

When reviewing your pricing model, be sure to include service pricing, product and program pricing, and even pricing for incidentals like late fees or interest. You might be leaking money because clients pay late or you aren’t adding in enough to account for simple things like postage and printing. Every business needs to do a comprehensive review and update from time to time. If you are underpriced, you probably are losing money both from not covering expenses and by missing out on revenue opportunities. Remember, cheaper isn’t always better. If you put in a bid for a lower price, it might send a red flag to the potential buyer that what you have is not the high quality they desire. On the flip side, overpricing could result in pricing yourself right out of new business. Strive to find just the right balance.

There you have it—the ten danger zones susceptible to leaks in any business (big or small). It’s actually not unusual for a business to leak money. What you cannot do is ignore those areas in your business where leaks are likely. Schedule time in your calendar to review these ten leak-prone zones. If you do have a problem, you will catch it quickly before it gets out of hand and your end-of-year profit takes a huge hit. Making sure you focus on both where you make money and how to hold onto the money you make will ensure your bottom line continues to be healthy, and you can rest easy without a panic call to the “plumber.”
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Creativity and supporting methods do not inherently require an in-depth understanding of target audiences. But when a company expects its designers to proceed without specific audience understanding, it creates a no-win situation. Designers find themselves operating in a creative vacuum, devoid of the empathetic and contextually-relevant user information needed to match products and services to customer needs. Customer advocacy and understanding ingrained in core creation methodology is key to informed design. And well-crafted user personas are a critical step in that methodology to ensuring products gain marketplace success.

Design is often motivated by the love of a process, an art form, or a methodology. This perseverance for “perfection,” to support the ideal state of a craft, can be a scary trap that continues well beyond personal studios and classrooms. Going down this path, entire industries can forget what and for whom they are designing. For example, in recent years, architecture as an industry has unfortunately developed this bad habit. The design community may praise the pioneering designs of rock star architects as they push the craft to new heights. At the same time, the “audience,” those outside of the craft who actually interact with and experience these constructs, often have opposite reactions—they see buildings created to stand out from the crowd but with little connection to community, or built at godlike scales with little regard for individual humans. In community forums, conversation boards, classrooms, and even within the design community itself, you can find critical points of view that high profile architecture is more and more being designed in a vacuum, a situation where “perfecting the art” has forgotten about the “end user.”

How Experience Strategy Advocates for the Users

As design professionals, we work in the space between our client organization and the customers they want to serve. Customer experiences are getting more complex, and User Experience (UX) Strategy serves to provide order, consistency, and a clear vision to those experiences.

Experience Strategy combines actively researched customer insights with a broad overview of the customer-product experience. Creating a strategy based on those insights is the surest path to success. A product may be digital in nature, but we do not limit our research to technology or devices. When problem-solving with a service-design methodology, any touch
point that influences a user experience—be it the announcement you hear on the train loudspeaker or the way the barista greets you at the order window of a coffee shop—is fair game.

This research process is often characterized as the “Discovery Phase”—the time and space needed to determine the problems that need to be solved. The discovery phase should include a combination of quantitative and qualitative user research. Combining both types of research is the foundation of the experience strategy method.

Quantitative research gives us a sense of people’s current behavior from the outside. Too often, that outside view is all the client considers. But the response to a set of predetermined survey questions, or the percentage of people who purchase a product or call a phone number, does not tell us anything about our customers’ motivations, goals, or desires.

Qualitative research is the key to innovative experience design. Qualitative research methods help us understand experiences from the customer’s point of view. We need a window into interior behavior to identify gaps, frustration points, and areas for innovation.

We accomplish this by getting the Strategy and Service Design team out into the field during the discovery phase. We look at the front-office and back-office stories. We look for the strengths and the weak points in the current experience.

- Where does that extra customer service effort generate delight?
- Where do back-office systems make a simple customer request difficult to fulfill, frustrating both the customers and the customer-facing associates?
- Where do the customers feel powerful and engaged? Where do they lose interest or walk away and fail to complete a process?

We stand behind the counter, listen to the customer-service dialog, shadow customers during the service process and, where possible, engage in our own “secret shopping” missions. Misalignments between the motivation of the service staff and the needs of the customers can create serious pain points for everyone.

How to Properly Build a Persona
Empowered by research and discovery, Experience Strategy specialists become advocates for the “end user” or customer. We champion their needs and push for solutions that will resonate with emotions, expectations, and behaviors.

A common tool for this advocacy has long been the “Customer Persona.” These are our Commandments for User Persona Development:

1. Behavior over Demographics
A trap we see many companies fall into is to research their customers by demographics and other external factors, often reflecting market segmentation. The reason we have personas to begin with is to categorize and group like behaviors, emotional states, wants, and expectations as they relate to specific design challenges. As UX specialists, we design toward behaviors. The fact that a customer is 34, single, and living in the burbs should have little to no effect on a design solution. An individual’s behaviors as they interact with a product, service, or brand have massive impact that needs to be understood. Personas should represent behavioral variances; for instance, a customer’s comfort level with a mobile interface vs. desktop computer is a behavior trait with huge design implication. See Exhibit 1.

2. One Size Does not Fit All
Overly generic personas are a common challenge; a “one size fits all” model simply does not work. Forcing a single persona to work for all situations of a brand or experience can dilute the specificity needed to influence design. As individual humans, we may represent patterns of core behaviors, but situational context changes everything.

“Everyday You” is not the same as “about-to-have-surgery You”; sometimes specific context changes fundamental behaviors. Getting specific to the situation is important. This is why generic-solve-everything-universal personas almost always fail; they are devoid of context and situational specificity. See Exhibit 2.

3. Qualitative Personas Need Qualitative Research
We cannot create personas based on quantitative research alone. Fundamentally, personas should be based on an understanding of your audience gained through both quantitative and qualitative research methods. One-on-
one interviews tend to give us the perspective we need. Any method that captures the behaviors, emotions, and contextual situations of customers will work. Using verbatim quotes from interviews as your persona’s voice is a powerful tool, adding a level of credibility and real-world flavor.

At Mad*Pow we often use qualitative research methods to find initial patterns in customer behavior and emotional state. Later we utilize quantitative methods, such as mass-online surveys, to confirm that behavior patterns observed qualitatively properly reflect a larger population.

4. Avoid Ambiguous Details

With the need for specific personas comes the need for specific information. Avoid attributes and descriptors that can be misunderstood or translated differently by different people viewing the same information. If we are told “he enjoys long walks on the beach,” does that mean he likes to meditate or loves marine biology? Make sure each attribute contributes to our understanding of the user’s actual behavior in relation to the design challenge.

A strategist’s greatest fear is having a very refined and specific direction misinterpreted when it is put into action. In most situations, those who create the advocacy and understanding (and persona) won’t be there to yell in the ear of every designer in the process. Do whatever you can to make your work immune to misinterpretation. See Exhibit 3.

5. The Number of Personas Should Be Based on the Discovered Variables of a Given Problem, Situation, or Ecosystem.

We are often asked “how many personas should we have?” There is no magical number. You will determine the behavioral variables that are important to a design problem through research methods. The number of personas should reflect the number of major behavioral differences that affect how a customer interacts with a brand, service, or product. For example, if Internet access is a universal gateway to health information, then behavior variances alone (e.g. the “General Interest Explorer” vs. “Searching for Symptoms” consumer) warrant different personas to be developed. Additionally, type of Internet device may be more or less significant than age or gender for specific design problems. The level of persona development can often be a judgment call based on the needs of customer representation vs. the risk of overcomplicating the innovation process. See Exhibit 4.

6. Choose When to not Use a Persona

As powerful as personas can be as a tool to advocate for the customer, sometimes their creation is overkill for the task at hand. A persona presents itself more or less as a single individual. With a persona comes the complexities of human life: emotions, varying behaviors, desires, and contextual situations. It’s a lot of information to take in, a lot to “get right,” with a lot of potential risks.

If there are only one or two simple variables in customer type or behavior, using archetypes may be a better strategy. Unlike a persona, a simple archetype does not represent all the complexities of a human. Instead, an archetype calls out a single trait or behavior. For instance, “people who use smartphones” and “people who do not” are simple behavior variances that can be represented in simple archetypes. The archetype becomes a binary comparison of a single trait. There are no complicated comparisons of other emotions or behaviors, no backstory of what a person does to get up in the morning, no list of family members, nothing that could greatly complicate a simple yes or no answer.

In short, how do we come up with innovative ideas for new products and services? The process starts by understanding the stakeholder’s business strategy at the highest level. At the same time, we need to reach deep into the customer experience. Advocating for customers’ needs and building empathy into design rationale is paramount to success. This same level of customer understanding and advocacy must be integrated for proper evaluation by leadership. The phrase “I like” should never be used in conversation. Instead, hearing “our customers will like” in the boardroom, supported by tools such as personas, leads to productive conversations and innovated processes that lead to success.
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Creating CONNECTED IMMERSIVE EXPERIENCES to Gain Insights!

Looking for ways to get research insights in new and creative ways? Try Immersive Experiences and observe what happens. Allow participants to have the experience and then debrief them to get “informed inklings” that can lead to strategy.

A great debrief tool to use is “What? So What? Now What?”
• The “What?” is what they experience;
• The “So What?” captures their reaction, the emotional part;
• And the “Now What?” is for you! How might you take what you just learned and apply it back to your research?

Types of Immersive Experiences
There are many types of Immersive Experiences you can utilize. They can be technological, such as augmented reality, but they don’t always have to be. Sometimes going “old school” helps you get some really great insights. And the experiences don’t have to be related to your project. For example, if you are gathering research for a new salad dressing, don’t just do a sampling with your focus group participants. Consider taking them out to a farm and showing them how the vegetables are grown, letting them ride a tractor and then taking them into the barn to milk some cows. THEN, debrief…what did they experience that can lead you to explore different marketing messages, ingredients, etc.?

Sensory immersions are also great because, let’s face it, none of us ever take the time to stop and smell the roses (literally). So…make people go somewhere and experience what they hear/didn’t hear, see/didn’t see, touch/not
touch, smell/not smell, etc., and then ask them to hypothesize why. That will lead you to capture some interesting new insights. I did this once at Disneyland. The challenge was around the resort hotels there. I sent participants into our resorts as well as competitor hotels, and the insights they brought back were telling and informed the ideas we created by adding more sensory experiences to a Guest’s experience.

Storytelling is also a strong tool. Ask an author to break down a story and then take each piece and see what you can ask participants to plug in based on your topic. For example, for this business opportunity, who might be the protagonist? Who might be the antagonist? Why? What’s behind it? How does the story end and what is the drama leading up to the climax of the story? This can spark some really interesting and different thinking when you are trying to gain insights into what might be disruptive and move the needle for the business.

And, never overlook the details. When I worked at Disney, we constantly talked about that. If you miss capturing the details during the Immersive Experiences, you might miss the boat entirely. What makes participants gasp? Why? What makes them smile? Cry?

Capture it all, and be sure to dig deep enough to get at the underlying principle, which can be applied back to the business challenge at hand.

Here Are a Couple of Examples:

**Scary Inklings (Human Library Example)**

When doing some research for a theme park that wanted to scare guests with one of its frightening attractions, I invited some interesting people in for discussions with participants to lead us to some new thinking. I selected a cemetery caretaker, a psych-ward nurse, and a corrections officer from the jail. The session participants included theme park marketing and entertainment team members, plus some thought partners from the community. I created intriguing, provocative questions for them to ask the guests, such as “What are some of the creepiest experiences you’ve witnessed in the psych ward/jail/cemetery?” The insights we gained from these “naïve experts” changed the course of how we looked at what should be happening at the attraction based on their conversations. It was immersive in the fact that even though we were not experiencing these incidents ourselves, their storytelling brought these scenarios to life and made us shiver.

**Normal, Deep, and Weird**

When working with a credit card company, a research team wanted to get different insights just to see where they could glean some disruptive perspectives. So, for the normal insights, they talked to customers who had a credit card. They got great clues from this survey such as how often they used their credit cards, what made them choose their financial institution, whether a rewards program made a distinction, etc. Then, the credit card company wanted to go deeper, so they went to people who work for credit card companies and financial institutions. The team asked this employee group to tell us about some of their strangest and most unique experiences. After that, they went weird and interviewed ex-cons who had done time for credit card fraud and had conversations with them to gain very different insights. Once they gathered all of these together, it was interesting to make some hypotheses and come up with some very different thinking.

**Differentiate Yourself as a Researcher Who Reaches Beyond to Get Richer Insights**

In summary, here are two tips for being a researcher who innovates to get richer results:

- Create experiences, excursions, and adventures to get participants to react and capture those insights. Convince your client you can get them to a different place by trusting you to use your expertise to ask the right questions of participants and inspire them to get unstuck.
- Instead of being literal about where to go and what to do for these immersions, think who else in the world has this same “essence” and then borrow from them to gain new insights.

“I selected a cemetery caretaker, a psych-ward nurse, and a corrections officer from the jail...their storytelling brought these scenarios to life and made us shiver.”
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"I want to thank you for your great work last week. I spoke to my colleague and he was very happy about everything. He said: friendly people, beautiful location and perfect recruitment...So you did a great job! Thank you!"

– Mira W., Haystack International

"I have been working with Lisa and the team at RRU Research for just about two years on a pretty continual basis. The work they have done for my team is always superb and takes a lot of the stress out of project planning as I know that the recruits they provide will always be perfect for the project at hand. The team at RRU Research is friendly, attentive and extremely flexible; often altering recruits for me at the last second and still managing to get the job done."

– Craig P., Weight Watchers International

"I wanted to let you know, because we don’t often find such a good combination of staff assistance and high-quality testing rooms. I am happy that Rob & Nancy recommended you to me, and I will certainly recommend your facility to my colleagues."

– Katie S., Nielsen Norman Group
Your project has finally been awarded, and it involves video. It’s exciting and probably a bit scary. Even with many unanswered questions at the outset—how long will the video be? Who will edit it?—you can still utilize a toolkit of video basics to lay the foundation for a stellar deliverable.

Between the travel expenses and a professional videographer’s day-rate, many researchers opt to shoot the interviews themselves. To get the best out of researcher-captured footage, keep the following tips and techniques in mind.

**Before the Interviews**

**Plan for a Winning Finish**

Whether you decide to edit the project yourself or hire a pro, you’ll want to make sure you are set up to work with the files your camera records. Shoot ten minutes of trial video and import the file(s) as a test. Check the file size and do the math to determine how many camera cards you’ll need instead of relying on a standard formula that may not apply to your camera. Before you start rolling, check your camera’s date/time stamp function and make sure it is set properly; on a lengthy or complex project, accurate information may help you recall interview participants.

**Labels Are Important**

Keep your camera cards organized in-field by instructing your team to label each one as follows: interviewer name, participant name(s), date, and city.

**Plan to Back Up Files for Editing and Client Delivery**

Invest in two 1 terabyte (1000 GB) hard drives: one for you or your editor to download the footage from the camera cards and a second to copy the media for yourself (or your client) as a backup. Consider an in-field file transfer to avoid disasters such as lost camera cards or overwriting of files.

**Set Participant Expectations before the Interview**

When traveling to a participant’s home, let him/her know who will be arriving, what role each person will play, and what gear will be involved. Assure him/her that despite the large camera, tripod, etc., he/she will not end up on the next hit reality series! All this can be covered in the standard release you ask participants to sign as well.
"Expand your B-roll shot list with ideas your team gleans during interviewing."

**Establishing Session Length**

Allow enough time to set up your gear while simultaneously meeting the participant and keeping everything relaxed. Also plan time to capture “B-roll footage” (discussed ahead). Consider the following schedule and build it into your discussion guide:

- **15 mins** – introductions and set-up interview
- **15 mins** – demonstrations and/or home tour to capture B-roll
- **15 mins** – packing up of equipment, good-byes

**Plan Your Shot List**

Plan to record something besides the actual interview footage. Hearing an urban mom discuss how she organizes her spice cabinet is better than reading about it in a report, yet seeing the spice cabinet first-hand is the best way to leverage the true power of video. In editing terms, this is called **B-roll footage**. For example, if your study is on summer spending habits, shots that depict typical summer activities lend flavor and color to your final deliverable and help “paint a picture” that brings insights to life.

Brainstorm potential B-roll before-hand. If your research is based on how people interact with a product, be sure to list all the various actions you anticipate encountering. See sample B-roll shot list in Figure 1.

<table>
<thead>
<tr>
<th>Scenario 1: Hot Sauce Brand Champion Video</th>
<th>Scenario 2: Summer Shopping Video</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close up of hot sauce being put on a burger</td>
<td>A mom putting sunscreen on child</td>
</tr>
<tr>
<td>Man uses hot sauce and passes bottle to friend</td>
<td>Friends at a barbecue</td>
</tr>
<tr>
<td>Hot sauce lover eating burger</td>
<td>Kids jumping on a trampoline or running under sprinklers</td>
</tr>
<tr>
<td>Two hot sauce lovers clink beer glasses in a toast, hot sauce bottle in foreground</td>
<td>A couple enjoying drinks on the balcony</td>
</tr>
<tr>
<td></td>
<td>Woman in tank top, shorts, and flip flops maneuvering shopping cart in parking lot</td>
</tr>
</tbody>
</table>

**Get Participants Behind the Camera**

Depending on the assignment, it may be the participant shooting video—for homework or as the main study data-collection method. Most consumers are video-savvy enough that you’ll be able to score valuable B-roll for your final video. Participants can upload the video to a file sharing site such as Dropbox or Sharefile. Supply specific participant instructions at least a week prior to the due date.

**During the Interview**

**Setting Up the Participant and Camera**

Face the participant toward the main light source; putting the participant’s back to a window or lamp will only capture a silhouette without details.

The participant should be close enough to the camera to fill the frame but not so close as to be imposing or get cut out when they move.

**Audio**

The black microphones you often see clipped to participants’ necklines are called lavalier (lav) mics and are the ideal way to get good audio.

**Observe the “rule of thirds” by framing the participant one-third of the way to one side of the frame, not the center. Also, leave some “breathing room” at the edge of frame next to the participant. If you’d like to learn more about the “rule of thirds,” visit qrca.org/VIEWS-016.**

If the participant is on the left side of the frame, the interviewer should be slightly to the right of the camera so the participant can look across the frame. (Looking to the same side of the frame appears awkward.)

Half the interviews should have the subject on the left of the camera and the interviewer on the right and half the interviews should have the participant on the right side of the camera, with the interviewer on the left.

Keep the interviewer as close to the camera as possible. Looking at the interviewer at a distance is jarring.”

---

“Hearing an urban mom discuss how she organizes her spice cabinet is better than reading about it in a report, yet seeing the spice cabinet first-hand is the best way to leverage the true power of video.”
If you can’t use a lav, a shotgun microphone will be the next best choice.
• Always place a microphone as close to the participant as possible without getting it into the shot.
• The microphone should always be facing the participant.
• The best distance for a directional mic is between one and three feet from the participant.

Interviewing for Video
You don’t want your questions included in the final interview. Before the interview begins, let the participant know that you might ask them to restate, rephrase, or repeat something you especially enjoyed.

Help them restate their thoughts succinctly without leading them.
If a participant is rambling about the joys of reading on their iPad, consider giving them a sentence starter for them to complete, such as: “The best thing about reading on a tablet is ______.”

Keep the shots simple. Having a lot of unnecessary objects in frame is hard on the eyes and distracting. Try to frame out all superfluous objects that don’t relate to or support the idea you are trying to capture.

After the Interviews
Managing Your Files for Easy Access and Communication
Camcorder video often is “clipped” by the camera into packets. After your interviews are complete, your first step should be to assemble these clips into a complete interview session. Label this file with the city, date, and participant, such as “LA_021516_Jenny.” If needed, modify your non-verbal feedback or cues to avoid interfering with great quotes: nod vs. saying “okay” or leave a beat (think “one Mississippi”) after a participant speaks before jumping in with an affirmation or probe.

Capturing the B-Roll
Expand your B-roll shot list with ideas your team gleans during interviewing. B-roll footage should be a mix of wide, medium, and tight shots to create the most dynamic video. For example, a wide shot of a mom cooking shows the context of her kitchen layout, a tighter medium shot keeps the focus on the subject and the action, while a tight close-up shows the details.

Keep the camera steady. When you find a shot, hold it for at least five seconds. This gives the audience time to focus and make sense of what is happening on the screen.

Show the story. If they’ve talked about how they prefer the texture of a book vs. a tablet, get a close-up shot of their fingers flipping some pages.

Fill the frame with whatever you are shooting. Having a lot of blank space is not appealing to the eye and makes your video look less professional.

Keep the shots simple. Having a lot of unnecessary objects in frame is hard on the eyes and distracting. Try to frame out all superfluous objects that don’t relate to or support the idea you are trying to capture.

You’ve Got it Covered!
Whether you end up delivering only raw footage or editing a video yourself, your client will appreciate your prep and organization. And if your client decides they want a full insights documentary, you’ve laid the groundwork for an effective relationship with an editor who can turn your video into a powerful and compelling story on time and on budget.
It’s no secret that the act of observing shoppers in the marketplace and their natural environment provides valuable information. Research that captures real purchase inclinations and hesitations is ideal; however, a lengthy time lapse or intense scrutiny (too many observers) can affect research validity, and it’s worth considering a couple of options to get around this situation.

**Building Empathy through**

**LIVE VIDEO Streaming**

**In-Store Stream of Consciousness**

Reactions to attractive signage and displays, intuitive store layouts, and the perception of a great deal are imperceptible on a post-visit sales receipt or satisfaction survey. An in-person shop-along interview is still a rather popular and effective way to yield more in-depth information about a shopper’s path-to-purchase in retail environments.

The shopper, the qualitative researcher, and usually a client (or two, incognito as “note-takers”) follow the shopper’s lead around the store, walking as a group, peppered in some questions as the shopper narrates what’s happening and what they see.

This approach is limited in how many team members are able to tag along. Plus, the rest of the interviews may be recorded, and the client team might watch the recording a week or two later…or they might not and just wait for the report! So, it can be a challenge to keep the research fresh and engaging on the client side for team members who cannot attend in-person—until now.

**The Power of Live Video Streaming**

Thanks to multiple mobile video streaming apps, as well as faster and better data connectivity (Wi-Fi or LTE), anyone with a smart mobile device and a data plan can broadcast their lives. In our world of YouTube, Periscope, Livestream, and Twitch, the number of live video streaming options continues to grow, enabling and inspiring newer legions of broadcasters every day.

This is also an emerging trend in qualitative market research, which is expanding the audience lens from lifestyles of the rich and famous to lifestyles of the everyday shopper.

Qualitative, in-store, shop-along interviews, combined with better Wi-Fi...
connectivity and mobile video streaming technology, provide a live, less-intrusive glimpse into shoppers’ experiences and choices:

*What does she take into consideration before she makes her decision? How long does it take for her to find what she is looking for? Are there any mishaps, detours, or surprises along the way? What motivates her to pick up impulse items that aren’t on her list?*

Live video streaming is a way to broadcast the purchase process as it’s happening, supplementing any other qualitative context captured before or after the purchase. The consumer is the star of her own live stream, featured in the shopping experience of our choice.

**Making it an Event Again**

With live video, the idea of positioning on-location interviews as an “event” for client-side team members is regaining momentum. Team members are historically present at focus groups in market research facilities, where they can participate from the backroom or communicate with online apps. In these cases, video footage is from a stationary camera or can be operated by a video technician.

With online and mobile qualitative, any number of team members can participate in a virtual backroom. Likewise, it is compelling to watch a live video feed broadcasted from an in-home or shop-along interview when a well-coordinated event takes place. Unlike stationary video at a focus group facility, live video from a mobile device can accompany shoppers throughout the store.

There are two significant approaches to consider for this live video feed:

**Solution #1: Broadcasted In-Person Shop-Along**

When broadcasting a live video stream from a retail environment, the qualitative researcher can observe the shopper experience in-person, but travel is not required for the rest of the team. These broadcasts can be observed securely, and team members can discreetly participate from the backroom by adding their own questions via text messages that are viewable in-field on the researcher’s mobile device, including hands-free wearables like Google Glass (with Glass, messages appear directly, a great benefit when the device is worn by the researcher). In this way, the team has the ability to ask questions from the backroom pertaining to what’s happening as the researcher-participant pair walks through the store.

**Solution #2: Remote In-Store Video-Conferencing**

Another approach—in-store video conferencing—is also gaining popularity, provided that the data connectivity is strong in the area. Live video conferencing has advanced to a point where participants are no longer tethered to a computer and webcam.

For a nationwide study where travel isn’t in the budget, shoppers can visit the store independently, provided they are willing to share a live broadcast from a fully-charged mobile device and narrate their shopping experience to the researcher. The shopper can see the researcher’s face in her mobile device, including messages that are viewable in-field on the researcher’s mobile device, including hands-free wearables like Google Glass (with Glass, messages appear directly, a great benefit when the device is worn by the researcher). In this way, the team has the ability to ask questions from the backroom pertaining to what’s happening as the researcher-participant pair walks through the store.

The researcher and team members not only are positioned to observe the live video stream but also have the ability to ask questions to help them empathize with the shopper during the interview (team members in the backroom are encouraged to curate their questions in a separate, private chat box).

The video feed can be reliably recorded through a video conferencing platform via Adobe Connect for distribution and reference.

A brief shopping experience of no longer than 45 minutes is best for this video conferencing interview, which can drain the shopper’s battery on a mobile device.

**Unscripted Reactions**

One of my favorite scenarios is when shoppers react to something different or new in the store, perhaps seeing something for the first time:

*What new arrangements, products, or services does she notice in this environment? Are these perceived as improvements or faults? What are her first impressions of what she saw?*

Rather than a mere reenactment of “This is what I normally do here,” these reactions of surprise or wonder—or even hesitation—can be full of richness, presenting a much-needed realism for broadcasted interviews.

**Our Connected World**

Broadcasting live video streams of these mobile field trips and one-on-one conversations is allowing us to build empathy with shoppers in a satisfying way. A wider audience of team members is able to accompany shoppers as they explore their perceptions of viable choices in retail environments, all while we probe to understand the dimensions around what is presenting challenges or delights and driving their decisions at each step of the path-to-purchase.

Moreover, with these advances in technology and qualitative research, we can connect with shoppers’ experiences in faster and more streamlined ways than ever before. These designs can be conducted with significantly less travel, they are more cost-effective, and teams are able to meet tighter timelines.

Live video streaming has broad appeal in our connected world, and it will be a part of our future in qualitative research.
Technology has been quickly developing to aid the process of gathering and analyzing data that might be called qualitative. In particular, we see a growing focus on “listening” to social media, and—in part forced by the volume of data generated this way—we see automated methods replacing human-powered analysis. For many researchers, this shift will raise major questions about the very nature of the research endeavor, but even for those with a more pragmatic approach, with a primary goal of gaining as much meaning as possible from unwieldy data sources, these shifts should raise questions.
“We can know a lot about our social media sampling strategy, but only if we stop to think about it. We need humans to determine the sufficiency of this data, for which types of conclusions, and we very likely need humans to conduct some complementary data gathering.”

Let’s take on two of these here. The first relates to sampling: who are we hearing and not hearing when we “listen” to social media? The second relates to meaning: what are we missing or misinterpreting when we rely on automated analysis? Qualitative researchers bring something important to answering both of these questions. We are critical in the process of deciding how to gather, integrate, and interpret data to avoid misinterpretation, misunderstanding, and a potentially tremendous loss of insight.

Does Big Data Equate to a Big N?
Social media has presented all of us with new means of speaking publicly as well as new means of hearing from the public. Yet, as social media scholar, danah boyd (she doesn’t capitalize her name) discusses in It’s Complicated: The Social Lives of Networked Teens, when we tweet (or post to Facebook, LinkedIn, Instagram), our sense that we are speaking to a wide audience is a bit of an illusion. In fact, our utterance falls as just a drop from the “firehose” of content coming at each of us, including those to whom we are directly tied. In a virtual sense, our followers are awaiting our next word, but a firehose is aimed at each of them. When our contacts next scan their latest content, they may or may not stumble across our last post or have the time to stop to read it.

As researchers listening to social media, we are subject to the opposite illusion: we have a sense that the content coming through the firehose, if only we could capture and analyze it all, creates a sample so large and freely given that it provides insights we’ve never had before. These “respondents” generating their own content are unbiased by our questions and our presence, and best of all, the data gathers itself. We have no need to recruit participants, to convince them to share their time with us, or to spend hours of our time interviewing and transcribing and making sense of what they tell us.

There is some truth underlying both of these illusions. We are heard to some degree, as any of us knows from the satisfying affirmation of a tweet favorited or a post liked, and social media listening certainly does provide an enormous volume of detail direct from consumers. We must also remember, however, the age-old lessons of self-selection and the error of sampling by a particular medium: it was 1936 when we learned telephones were a misleading political polling tool. Now we must interpret social media data remembering that not all users of our products tweet. Tools such as Radian6 and NVivo’s NCapture browser add-on offer detailed “metadata” on posts and users. This helps us distinguish those users from one another, but we still need to remember this universe of users is only a subset of the population and not necessarily representative of the population we seek to understand.

Sampling from the Firehose
Even when we recognize that our “sample” is limited to those who participate in social media, our view is skewed by methods that can be outside our control. Each tool developed for social media listening comes with its own sampling methods and limitations. It is important to be aware of these to use the data effectively. Does the tool I am using access the full stream of the “firehose”? If not, how is it being filtered? Can I control the filters in any way? If not, who is controlling them and how? What is the effect of time of day? By what set of criteria is the number of tweets or posts being gated if available content exceeds my allowable limits? (See Struve, 2015, for an excellent discussion on sampling from Twitter.)

We can know a lot about our social media sampling strategy, but only if we stop to think about it. We need humans to determine the sufficiency of this data, for what types of conclusions, and we very likely need humans to conduct some complementary data gathering. We need a sound methodology to think through these issues and to think about how these data should be framed before we begin to analyze and draw conclusions. Then, we’re faced with the task of deriving meaning.

What’s in a Word Cloud?
All of the tools designed to help us listen to social media gather data with such significant volume that we are tempted (or, realistically, sometimes forced) to resort to automated text analysis to derive key themes, terms, and related sentiment. Some tools provide that analysis in lieu of the raw data. Here are a few limitations to keep in mind, all of which require a human’s look at the automated results.

A word cloud has become a nearly ubiquitous visualization, intended to give us a sense of meaning underlying a large volume of text. It may be based on a simple word frequency or concept groupings based on groups of synonyms.
The word cloud displays the relative frequency of words in a set of textual data. It can be very informative when working with data involving simple language and concrete content. Would a word cloud help us to determine the level of a sense of isolation or belonging among teens? Probably not. Would it help us predict which of several films are getting their attention? Almost certainly. At times, a word cloud can be frustratingly obtuse: well, of course, those are the most frequent words in this discussion—now what?

Cluster analysis applied to word frequency can add a layer of meaning. What groups of users form around what groups of common words? From the clusters, we can drill down to see the shared language, and from there we can derive some meaning. The potential to compare the words associated with each cluster gives us further insight.

“Without some caution, our analysis can amplify content far beyond its influence ‘IRL,’ and it is ‘in real life,’ after all, where we are attempting to make our impact.”
The qualitative researcher has in fact a great new importance today, adept at questioning the question, viewing a problem through multiple perspectives and sets of data. These tasks still call for humans.

The views expressed are the author’s and do not necessarily reflect those of QSR International.

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• "Qualitative Research and Stratified Random Sampling of Twitter Data Using NCapture." Stephan Struve, October 2015, qrca.org/VIEWS-015.
QRCA continues to conduct and record interviews with thought leaders in the qualitative research industry. These podcasts shed light on subjects of great interest to those whose work involves qualitative research. Podcasts of these interviews are available at the QRCA website (www.qrca.org) under the Publications link as streaming audio and can also be downloaded to your laptop or portable listening device as an MP3 file.

Listen in as QRCA VIEWS Podcast Editor Mike Carlon interviews Randy Scher of iPowering Motivation about the use of hypnosis in qualitative research. In this interview, Randy dispels some common myths around hypnosis and discusses its practical applications in qualitative research. For example, as people can remember things vividly while “in state,” Randy discusses how memories of early brand experiences can be shared and how stories of those experiences can help brands better understand the relationships they have with consumers. Hypnosis also helps to uncover brand associations below the level of conscious thought, where modern neuroscience suggests most brand decisions come from.

Randy is a former Consumer and Market Insight Director at Unilever and championed the practice of using hypnosis in qualitative research to better understand Unilever brand experiences. He now runs iPowering Motivation, a consultancy designed to drive attitude and behavior change to solidify brand growth and loyalty through unique and powerful targeted consumer programs. An accomplished musician, Randy now resides in the West Palm Beach area of South Florida. You can learn more about Randy and iPowering Motivation by visiting www.ipoweringmotivation.com.

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Leading the Conversation on Qualitative
Presence: Bringing Your Boldest Self to Your Biggest Challenges

Amy Cuddy, Little, Brown and Company, 2015

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Working in qualitative research requires more than research skills. The field requires a particular set of personal attributes and abilities that allow us to make meaningful connections with people, listen deeply, and communicate effectively. These are part of what it means to have “presence,” according to Amy Cuddy, author of Presence: Bringing Your Boldest Self to Your Biggest Challenges.

Amy Cuddy is a social psychologist and professor at Harvard Business School. Her research has been published in top academic journals and covered by the popular media, but most people know her from her breakout 2012 TED Talk, “Your Body Language Shapes Who You Are.” That 21-minute video has been viewed more than 32 million times, making it the second-most-viewed talk in the TED website’s history. But Cuddy’s sometimes breathless TED performance about power poses was the tip of the iceberg of what she wanted to say. Now, three years after her emotional and self-revealing TED Talk, she has released the book that expands on her research and ideas.

Cuddy admits that “presence” is difficult to define. Trying to wrap words around the concept, she says presence is “the state of being attended to and able to comfortably express our true thoughts, feelings, values, and potential.” She says we know it when we feel it.

In Presence: Bringing Your Boldest Self to Your Biggest Challenges, Cuddy unpacks the research behind her TED Talk, explaining the behaviors and attitudes that interfere with our ability to achieve presence. She describes research that reveals how our physical postures influence our mood, productivity, and performance. Expansive body positions, such as the Wonder Woman pose, with feet apart and hands on hips, or the starfish pose, illustrated on the book cover, make us feel powerful. Conversely, closed body positions, such as slouching forward, wrapping arms around the body—or (take note!) hunching over your phone—can make us feel powerless. Study after study confirm that even two minutes of adopting a power pose can create biological changes with a positive impact on mood, emotion, and performance. The mind follows the body.

In addition to her experience as a researcher, Cuddy brings a tragic personal experience to the topics she covers. At age 19 she suffered a serious brain trauma as the result of a car crash. She was forced to drop out of college and spent many months in rehabilitation and even more on the slow road to recovery before eventually going back to school. She said her experiences left her struggling with many of the barriers to achieving presence described in her book.

“Imposter Syndrome,” which Cuddy says she suffered from for many years, is feeling unworthy of a position or an achievement and the fear of being unmasked at any time as a fraud. Misalignment of our thoughts, emotions, behaviors, and physical and facial expressions causes internal turmoil, which undermines our feeling of being true to ourselves. The “Spotlight Effect” is the persistent sense that people are watching us more closely than they actually are. Naturally, the pressures induced by all of these associated syndromes have a negative impact on attention, memory, performance, and, ultimately, ability to be present. Think about the time you stumbled in a presentation or stuttered your way through a new client meeting.

If only the rewards of being present required just two minutes of Wonder Woman posing a day! Alas, achieving presence takes more work than that, so Cuddy gives us two chapters at the end of her book about the application of the principles. In a chapter about “Self-Nudging,” she describes how incremental changes to our behavior are more successful at creating new habits or breaking old ones than grand plans and New Year’s resolutions. And in the final chapter she advises us not just to “fake it till you make it,” but to “fake it till you become it.”

Presence is not without flaws. Cuddy occasionally wanders off course in chase of a feel-good story about reducing inner city violence or with wide-eyed awe in a celebrity interview. The research summaries sometimes feel repetitious. Sprinkled among the research summaries are stories of people Cuddy has met or corresponded with that attest to the real-world application of the research, which can read a bit like fan mail or religious revival testimonials. And Cuddy’s passion for her topic can feel somewhat self-helpy.

But don’t let the flaws put you off, because this book provides valuable lessons for the qualitative researcher willing to dive in and consider the concepts and implications. You could watch the TED Talk and get the gist of some of what Cuddy elaborates on in this book, but the lessons she shares are not the kind that can be easily absorbed in a convenient 21-minute video. And reading the solid research behind the entertaining video adds more depth and credibility to the findings.
Without a doubt, the spotlight is on online qualitative research these days. A day doesn’t go by without an article, tweet, or conference panel announcement about it. As a qualitative researcher who oversaw her first online qualitative concept test as an ad agency account planner in 2001 and whose current qualitative practice specializes in using digital methods, it makes me giddy. With all this focus, some people are jumping in feet first without a thorough understanding of how, when, and where to use online qualitative. Doing Qualitative Research Online by Janet Salmons seeks to fill this educational gap by providing a background on the methodologies, methods, and ethics, as well as a how-to framework. In it, she also counters a misperception among others that online qualitative research can be treated like traditional, in-person methods.

Heavily grounded in academia and targeting students, Doing Qualitative Research Online will mostly serve both as an easy-to-read, solid resource on online qualitative’s methodological foundations for experienced corporate researchers and as a good-to-know for newbies rather than an in-the-field guide. I found it to be a nice refresher of disparate things I have read in the past, a teacher of some theories I did not know, and—more practically—sticky-note-marked explanations for use the next time I have to describe the value and potential of online qualitative to clients.

Janet Salmons, a former graduate faculty professor at Capella University and an independent researcher, said she wrote Doing Qualitative Research Online because “while many books and articles report on completed research, students need to know how the study was designed and conducted. In this book I endeavor to provide both the background and the how-to.” As part of this, she introduces an updated tool called the “Qualitative e-Research Framework,” which she first proposed in her 2014 book Qualitative Online Interviews, a holistic, conceptual approach to designing and conducting studies online. The framework comprises a set of questions and models intended to guide decision-making (such as “does the researcher clearly delineate an insider or outsider position?”) and serve as a check-list (for example, “does the researcher have permission to access and use posts, documents, profiles, or images?”). The approach is broken out as follows:

- Aligning Purpose & Design
- Taking a Position as a Researcher
- Selecting Extant, Elicited, or Enacted Methods
- Selecting ICT (Information & Communication Technologies) & Milieu
- Handling Sampling & Recruiting
- Addressing Ethical Issues
- Connecting the Data
- Analyzing the Data & Reporting

The book flow generally follows the “Qualitative e-Research Framework,” with Salmons explaining in full detail online qualitative research’s academic theories and origins in an easy-to-read format.

Throughout the book, Salmons successfully makes the case, using her “Qualitative e-Research Framework,” that while aspects of traditional qualitative research can be applied online, the Internet creates many unique variables that need to be considered differently when designing and executing a study, including data collection and permissions. For example, in the chapter “Qualitative Approaches for Research in a Data-Intensive World,” she posits that different classification is needed for how data are collected online based on where the data reside, how they are accessed, and how much direct contact the researcher has with participants. She defines the three types of online data collection as extant (no contact with participants—think social media analysis), elicited (direct contact—as in online focus groups), and enacted (collaboration with the participant such as via role play and games) versus traditional qualitative’s interviews, observations, and document analysis.

The usefulness of Doing Qualitative Research Online for experienced corporate researchers, beyond as a reference guide, is limited by its reliance on academia. Methodologies such as online communities and digital ethnographies that are more mainstream on the corporate side are either not mentioned or not discussed in full. The chapter on designing and conducting ethical studies focuses more on permissions than on how to protect participants’ data, an increasingly important issue as evidenced by the new EU Data Protection Law. Further, the lack of case studies in the book can make it difficult at times to imagine how the methods and recommendations shared could be applied to non-academic research. But these limitations, however, may just be the point. Salmon said, “New and emerging online methods will not gain credibility unless researchers use them to generate studies that contribute to literature. The novelty of new approaches may catch readers’ attention, but quality research will get published and referenced—and will inspire other scholars to use the methods and extend the inquiry.” Who among us, especially on the corporate side, will heed her call?
Copy, Copy, Copy: How to Do Smarter Marketing by Using Other People’s Ideas

Mark Earles, Wiley, 2015

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Earles divides this book into five chapters. Throughout the book he uses multiple examples from science, art, religion, consumer products, and entertainment as support.

Chapter 1: “In Praise of Copying” focuses on explaining his thesis of why he believes “copying” plays such an integral role in leading to creating something new. He shows how giants such as Shakespeare and Elvis Presley, whom we think of as artistic originals, really were copiers, and their acts of copying allowed them to “create” their personal imprint and spin on something that already existed. Earles also lays out the “Rules of Good and Bad Copying.” To further alleviate the fear that the reader might have about copying, he explains how copying is mostly an Anglo-Saxon hang-up and that other cultures tend not to suffer from this fear.

In Chapter 2: “How To Copy Well,” Earles talks about how people wrongly interchange the terms “invention” and “innovation” and how, many times, when they are talking about wanting something new, they are almost always looking for tweaking or putting a personal spin on something that already exists. Earles also explains the “Rinse and Repeat” process, which is when copying we tend to make changes that can lead to a different approach or idea. One of his examples of how this works is the child’s game of telephone where what the first person says is not what the last person hears since each person interprets, processes, and gives back something different. He also talks about how this copying process transformed a bur-covered hike in the Swiss Alps into the invention of Velcro.

Chapter 3: “What Kinda Things?” Maps and Drawing” is where he stresses the importance of seeing things visually versus verbal or written descriptions. He provides multiple examples of how drawing a visual map is a much stronger impetus for creativity and seeing patterns than just looking at a list of facts or descriptive words. Examples of visual mapping include Robert Louis Stevenson developing the characters and plots of Treasure Island and Dr. John Snow solving the London cholera outbreak of 1854 (which is recounted in one of my all-time favorite books, The Ghost Map: The Story of London’s Most Terrifying Epidemic—and How it Changed Science, Cities, and the Modern World, by Steven Johnson).

Chapter 4: “Where to Copy From: The Pattern Books” is the chapter I referenced earlier and is the heart of the book and provides “52 strategies to copy, borrow, or steal.” While not all are applicable to qualitative research, there are more than enough to provide ideas for a qualitative research toolbox. There are so many ideas and details here that even Earles states “we don't suggest you try reading all of these in one go…there are far too many to process in one sitting. However, we suggest you flip through and return when you are faced with a particular problem.”

Chapter 5: “Copy Better” outlines how you can “apply what (you've) learned to real-world problems.” In this wrap-up chapter, Earles challenges the reader through interactive exercises that require the reader to answer questions, visualize ideas, and draw maps.

Copy, Copy, Copy is a fun read and a book I will definitely be referencing in the future.
Before reading Richard H. Thaler's *Misbehaving: The Making of Behavioral Economics*, I had sat through numerous conference presentations and read journal articles and best-selling books on this topic and thought of myself as pretty well informed about behavioral economics. Thaler showed me that there is still a lot more to learn.

Behavioral economics is the integration of psychology’s behavioral science with the world of economics and helps us understand why people make irrational decisions even when they have the necessary information to make a rational decision. Knowing more about behavioral economics will enhance how you think about and design qualitative research methodologies.

Richard H. Thaler is an economist and is uniquely qualified to write the definitive book on the history and evolution of behavioral economics theory and application. Thaler is a key player in both the creation of the field of behavioral economics and getting it recognized as an integral component of economic theory. He has had a role in formulating the main concepts, conducting the studies, and writing many of the key papers that laid both the foundation and ongoing growth of the field of behavioral economics. He is also the co-author, along with Cass Sunstein (a Harvard law professor), of a previous best-selling book on behavioral economics, *Nudge: Improving Decisions About Health, Wealth, and Happiness*.

In writing *Misbehaving: The Making of Behavioral Economics*, Thaler manages to cram a lot of interesting background, anecdotes, and scientific studies into this book without making the reader feel overwhelmed. He has an eye for detail and a witty, self-deprecating writing style, as he provides the history of how behavioral economics began and its transformation from a derided science to one of acceptance.

In the late 1970s, Thaler began to challenge traditional microeconomic theory, the premise of which was that people make rational decisions based on the information available to them. His first paper challenged the “Learning Theory,” which Thaler described as assuming “we all live in a world like the Bill Murray movie *Groundhog Day*. Bill Murray’s character keeps waking up and reliving the same day, over and over. Once he figures out what is going on, he is able to learn because he can vary things one at a time and learn what happens. Real life is not as controlled…and as a result, learning can be difficult.”

But it was Thaler’s 1987-1990 quarterly columns, Anomalies, in the *Journal of Economic Perspectives*, which he sometimes wrote with co-authors, that helped shake the framework of traditional economic theory. In Anomalies, he documented individual instances where economic behavior seemed to violate traditional microeconomic theory. Most of the columns—and he gives some examples in the book—related to challenging the premises of long-accepted finance/economic theory.

Traditional economists did not take kindly to these challenges, so Thaler has a lot of fun as he recounts in this book how the University of Chicago, the bastion of seven Nobel Prize Laureates for economics, recruited him and created the Ralph and Dorothy Keller Distinguished Service Professor of Behavioral Science and Economics at the Booth School of Business at the University of Chicago, specifically for him.

In this book, Thaler takes us through an extensive list of behavioral science studies. Even with those that I was previously familiar with, Thaler adds additional depth by providing the backstory of why something was explored and who the people were who came up with the hypotheses, designed the studies, and wrote the papers. Many of the studies he discusses focus more on the psychology of behavior, while others focus more on quantitative economic theory/stock market studies with lots of charts and statistics. Even if you skip over the stock market ones, you will still get a lot of insight from this book.

This book made me think of behavioral economics in a much broader and serious light and prompted numerous ideas of how I could better integrate behavioral economics into my qualitative research practice. *Misbehaving: The Making of Behavioral Economics* has something for those new to behavioral economics as well as those who feel well versed.
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