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Does the Practice of Qualitative Research Transcend Culture?
A New Zealand Perspective

GLOBAL: In the context of New Zealand and Māori, its indigenous people, this article aims to provoke thought and discussion on how well equipped we are as qualitative researchers to engage Māori in research and identifies important principles when undertaking research with Māori.

Orlando: the Mouse and Beyond
TRAVEL WISE: On October 7-9, the 2015 QRCA Annual Conference will be held in Orlando, Florida. Here is a handy guide for an Orlando area visit, activities, food and fun beyond the expected.

Family-run Market Research Business: 5 Love Stories
BUSINESS MATTERS: What makes family-run market research businesses successful? Clearly defined roles, honest feedback, respect and love!

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Before giving you an overview of what is inside the summer 2015 edition, we’d like to welcome our new publisher, E&M Consulting of Chaska, MN. The focus of E&M’s business is trade publications for associations like the QRCA, so they have a deep understanding of the business aspects involved in keeping a magazine like VIEWS strong and viable. We are delighted to be partnering with them and look forward to a long and fruitful working relationship.

The articles in this issue focus on themes, technologies, and skills that are very relevant to qualitative researchers. In Any Way You Want It: Video for a Social, Mobile, and Digital World, Carmen Bryant of NBCUniversal walks us through the grass roots video trends, such as “selfie celebs” and “must tweet TV,” that will shape the future of TV. Jim Bryson’s You Can Go Global piece lays the possibilities for using qualitative technologies to reach markets quickly in the developed and developing world. For our Online/Tech Talk section, Foster Winter encapsulates the findings from the QRCA Field Committee and Philadelphia Chapter on effective ways for filtering out cheaters and repeaters from your online studies.

Within our Global section, Janette Brocklesby has written a wonderful article where she describes how to do research with participants from the Māori culture of her native New Zealand. On a similar theme and using perspectives from her own background as a therapist and qualitative researcher, Karen Landmann describes how to work across cultures with participants. In Everyone is Creative—How to Maximize Ingenuity in a Group Setting, Lisa Fuchs offers fun and practical ideas for drawing out participants’ creativity when doing online and in-person ideation and co-creation sessions.

For our Business Matters section, Laurie Tema-Lyn shares her insights on family-run qualitative businesses that she gained by talking with five QRCA members who have succeeded at this. In this piece, Laurie describes the unique history on how each business was founded and how they have been able to stay in business for many years. Laurie was able to distill people’s stories to a formula for success that boils down to chemistry, respect, and finding a way to maintain boundaries.

To help you in your planning for the QRCA annual conference, make sure to check out the Travel section for Orlando natives Mary and Michael Sayer’s tour of the local food/travel scene. They demonstrate how there is a lot more to Orlando than theme parks.

For our Book Reviews section, George Sloan reviews The Qualitative Manifesto, which explores our field as a social scientist, and Karen Lynch offers an intriguing shakedown of Brand Shift: the Future of Brands and Marketing, which explores how electronic connectedness has changed the way organizations need to approach branding. Be sure to check out podcast.qrca.org to hear Karen’s podcast with the co-author of Brand Shift, Owen Shapiro, as well as Michael Carlon’s interview with Mike Andusi, founder of mobile research platform producer CrowdLab, on why QRCs need to add mobile to their qualitative toolbox. Happy reading!
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What makes QRCA different? That’s a question I hear a lot, particularly from new or prospective members, often to which the first response is “the unique culture of the organization.” I don’t for a minute disagree with that answer, but there is so much that truly makes QRCA an unparalleled professional organization for qualitative researchers.

1 Creativity+Innovation
The Creativity+Ideation SIG helps QRCA members to develop better tools and skills around creativity and innovation for QRCA members to offer their clients.

2 Ethnography
The Ethnography SIG provides a platform for QRCA members to learn about ethnography and improve the practices of ethnography; to develop guidelines for QRCA members conducting ethnographic research; to exchange current ethnography practices and techniques; and, to educate others concerning the differences between ethnography and other methodologies.

3 Latino
The Latino SIG is a forum where knowledge and camaraderie flow among its members through informal discussions, formal presentations or just by reaching out. Members of this group are researchers working with Spanish or Portuguese speaking participants in the US, Mexico, the Caribbean, Central and Latin America, and researchers who want to understand how to do qualitative research in these markets.

4 Online
The Online SIG is a home for QRCA members who are already online qualitative research specialists or are interested in expanding their online research services, so that members can continually learn from one another, stay current with evolving technologies, and address the challenges and opportunities unique to working online.

5 Pharma/Healthcare
The Pharma/Healthcare SIG is dedicated to keeping interested QRCs abreast of issues within the pharmaceutical and healthcare industries that may be of interest to them. This SIG is where QRCs go to discuss and brainstorm techniques and methodologies that lend themselves well to qualitative pharmaceutical/healthcare research.

6 Social Media
The Social Media Research SIG supports QRCA members interested in expanding their education and skills in this new and rapidly changing field. The members’ interests and skill sets will determine the specific direction of the group with potential areas to include learning about new social media listening platforms, participating in a listening case study, and expanding qualitative social media engagement practices.

7 Young Professionals
The Young Professionals SIG provides a platform for the exchange of ideas and experiences, as well as an opportunity for “younger” QRCs to benefit from the profession and life lessons learned by those with many years of experience in the industry.
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Does the Practice of Qualitative Research Transcend Culture?

A New Zealand Perspective

In New Zealand, there is debate as to whether or not non-Māori researchers have the cultural competency, expertise and skills to undertake research with Māori. Māori researchers argue that research with Māori can only be undertaken by Māori, ensuring a Māori lens is applied.

This article questions the universal relevance of this position, especially in the context of qualitative research practice and principles.

The concept of culture is complex. Culture involves rituals, values and belief systems, all of which characterize individuals, groups and nations. Different cultures are what make countries unique. They are about the values and beliefs of groups of people and include the way people think about and understand the world and their own lives.

Cultures also evolve. In Māori design, the koru (loop) is a visual anchor that depicts the way in which cultures change over time. The koru is both a symbol of creation and a metaphor for the way life changes and yet stays the same, with its unfurling silver fern and rolled up inner leaves in the center.

**INSIGHT #1: Māori culture is evolving into an integral part of New Zealand’s culture and national identity.**

New Zealand has a unique bicultural origin, which was sealed in 1840 with the signing of the Treaty of Waitangi, New Zealand’s founding document. The treaty was made between the British Crown and about 540 Māori rangatira (chiefs) but was ignored until the Waitangi Tribunal was created 135 years later to investigate treaty breaches. Over the past four decades, more than 2,000 claims have been lodged, and many large settlements...
have been made. As a result of legal action, each Māori iwi tribe has the ability to act on behalf of its members. Many examples now exist of successful mergers of Māori and Pākehā (European) cultures in New Zealand in politics, business and everyday life. Before the Waitangi Tribunal’s legal actions, the Māori culture’s contribution to New Zealand’s identity was hidden away in museum exhibits or limited to powhiri (traditional Māori greetings) for visiting dignitaries. In 2012, Paul Harper—social media editor with the New Zealand Herald—reported, “There has been a revolution in New Zealand culture, and we will continue to see Māori culture as integral to New Zealand society.”

As non-Māori qualitative researchers, we experience New Zealand’s culture along with other groups living in New Zealand, and this provides an important context when conducting research with Māori. Many Māori words are part of common language in New Zealand without any interpretation needed.

**INSIGHT #2: As researchers, we must be aware of our own personal culture and relationship with New Zealand to be effective in engaging Māori in research.**

Our feeling of belonging (cultural identity) is multi-dimensional, evolving and highly personal. Our values and belief systems, and the groups with which we identify, have a bearing on how we engage with people in research. When researching Māori, we must acknowledge we have a personal culture, understand what this is and, as well, ask the question “How do I identify with New Zealand and how am I the same as and different from Māori?”

**INSIGHT #3: Ethnicity is subjective, not just a biological fact. It is about how people want to be included.**

“Māori researchers argue that research with Maori can only be undertaken by Māori, ensuring a Māori lens is applied.”

One in seven people living in New Zealand identified as Māori in the 2013 New Zealand Census. The proportion of people identifying as Māori has increased by almost 40 percent over the past 20 years, outstripping population growth. However, people identifying Māori as their only ethnicity has decreased, while those identifying Māori with another ethnicity has increased. One in two people in
the Māori ethnic group now identify as Māori and another ethnicity. This cultural identification is reflected in many personal stories reported in the media. New Zealand author Tina Makereti’s search for her own identity formed the springboard for her debut novel, Family Ties. She said, “I just wanted to be Māori for a while and realized I couldn’t really. It’s part of me to be Pākehā as well. It took me a really long time to become comfortable with saying I’m both.”

Make no assumptions about what being Māori means to people. Apply qualitative research practice and ask the question, “what does being Māori mean to you?” to provide context for engagement and interpretation.

**INSIGHT #4: As non-Māori researchers, adhering to Māori protocols and customs (as appropriate) enhances engagement.**

- Begin with a karakia (Māori incantation). A karakia invokes spiritual guidance and protection, to increase the spiritual goodwill of a meeting or gathering and thereby increase the likelihood of a favorable outcome.
- Connect on a personal level by sharing information via a mihimihi (introductory speech that establishes links between the people). For Māori, it is an introduction where whakapapa (genealogy and ancestral ties) is shared. For Māori, knowing their whakapapa is to know their identity. It also provides information on birth place, link to land and mountain, river, lake and sea, tribe, sub-tribe and mārae (Māori sacred meeting place). Non-Māori share personal information on places and people significant to them, as well as the country they are from.
- Recognize the importance of whānau (family). Extend the invitation for the interview to include support people, and be prepared for any number to be present. They may all want to take part or simply observe. This requires careful people management and management of incentives.
- The concept of time is crucial in the Māori world. Be prepared to reschedule (family situations may be in flux) and, once at their home, to wait for all the support people to arrive and to take a longer time to hear the stories.
- Take shoes off before entering Māori homes. It is customary to do this when entering a mārae, and this courtesy extends to all inside places. You will often see a sign outside the door making the request.
- If food is offered, always accept. It is a gesture of welcome. Kai (food) is an important part of Māori culture. The gathering, preparing and sharing of kai shows hospitality and respect for visitors.

As researchers living in New Zealand, we have a duty to be culturally competent in Māori affairs and protocols.

“As researchers, we must be aware of our own personal culture and relationship with New Zealand to be effective in engaging Māori in research.”

“In Māori design, the koru (loop) is a visual anchor that depicts the way in which cultures change over time. The koru is both a symbol of creation and a metaphor for the way life changes and yet stays the same.”
**INSIGHT #5:** The very essence of qualitative research is seeing the world through the eyes of others, exploring diverse perspectives and world views and uncovering meaning.

This practice effectively extends to undertaking research with Māori and researching topics of particular importance to Māori. As a community of qualitative researchers, we are well equipped to understand and explore Māori issues: QRCs know how to tackle sensitive subjects, explore context, and allow stories to unfold. We are experts in our practice, not experts in every subject, and we know when to engage other experts and advisors.

**INSIGHT #6:** Māori are found in all walks of life.

No one-size-fits-all approach exists to undertaking research with Māori. Ethnicity is just one cultural group Māori belong to. Māori are business people, artists, mothers, athletes; they have a sense of belonging with any number of groups within New Zealand society.

Unfortunately, Māori are overrepresented in New Zealand’s prisons, have poorer health outcomes, lower levels of educational achievement, and feature highly in the unemployment statistics. Some Māori live on the fringes of society, are hard to reach and/or live in remote rural locations, and live complex, chaotic lives. In these cases, traditional research recruitment approaches are less effective and new approaches have to be adopted:

- Vigilance is essential! Multiple times and multiple types of contact are used to enlist in the research.
- Provide cell phones, put credit on phones and text first to preempt a call to enhance trust. (Many do not have landlines, internet connection, credit on cell phones or are fearful of answering calls in case it is a debt collector.)
- Community connectors are used for introductions and support. These can be kaumātua (elders in Māori society who are held in high esteem) or people working in a professional way with Māori in the community.
- Go into the community, or pay for transport to come to an alternative venue.

**INSIGHT #7:** Is the challenge that non-Māori researchers are ill equipped to undertake research with Māori more about identity politics than capability?

Identity politics are political arguments that focus upon the interest and perspectives of groups with which people identify. As Tariana Turia, a recently retired prominent Māori politician, said, “Everything to do with Māori is political.” Is the stance of Māori researchers more about advocating for Māori and their access to services than effectively researching Māori?

In summary, qualitative researchers are well equipped to undertake research with Māori and to convey the Māori perspective; they are adept at recognizing when to engage Māori expertise or to adopt different recruitment strategies to ensure participation of Māori who live on the fringes of New Zealand society. As researchers, we have a duty to be culturally competent in Māori affairs and protocols. To effectively engage with Māori interview respondents, we must explore what being Māori means to them and be aware of how our own values and cultural lenses could be affecting our listening. Before taking on research with the Māori, be able to answer “How do I identify with New Zealand and how am I the same as and different from Māori?”
TRAVEL WISE

Orlando
THE MOUSE & BEYOND

By Mary Sayer and Michael T. Sayer
- New Perspectives
- Vero Beach, FL
- msayer@new-perspectives.net
That said, the theme parks are fantastic and a “must do” for those who enjoy the Magic of the Mouse. October is a great time to visit as crowds and temperatures are usually more manageable than in the Summer. Disney now has four theme parks (Magic Kingdom, Disney Hollywood Studios, Animal Kingdom, and Epcot), which will be hosting the 2015 Food and Wine Festival during the conference, as well as two water theme parks, Blizzard Beach and Typhoon Lagoon, plus the Richard Petty Driving experience. Universal has two theme parks, Islands of Adventure and Universal Studios. Sea World has its own water park called Aquatica and Discovery Cove where you can swim with dolphins and snorkel through an aviary. LEGOLAND, which is about a 50-minute drive from Disney, is ideal for Lego enthusiasts between the ages of 7 and 13.

As there are so many resources and travel guides with fantastic tips on navigating these parks, we’ll just offer one piece of advice. Look into a FastPass+ for Disney parks or an ExpressPass for Universal. These basically allow you to cut the lines and are available for purchase. If you stay at a resort on the property these passes can be a perk included with the hotel rate.

The QRCA Conference will take place at the Hilton Bonnet Creek Resort, which is certified as a "Walt Disney World Good Neighbor Hotel." They provide complimentary shuttle service to Disney theme parks as well as arrangements for fee-based shuttle service to other Orlando theme parks. The hotel also has a Hertz rental car desk.

Our conference hotel is located near the theme parks and Downtown Disney/Pleasure Island. This is a fun place to wander around, shop, grab a bite to eat and people watch. Dining options range from Portobello, an authentic Italian restaurant, to eclectic food trucks. Entertainment options are numerous. One of our new favorite places is SplitsVille Luxury Lanes, a modern twist on an old-school classic featuring bowling, billiards, food and more. House of Blues offers live music and a great Gospel Brunch on Sunday. Cirque de Soleil’s La Nouba, a permanent Cirque show, is simply amazing. Having been to all the Cirque shows in Vegas, we find this one of our favorites. Pleasure Island, which requires a ticket to enter, is a fun bar-hopping opportunity offering music and dancing at places like Bongos and comedy/improv shows.

I-Drive (International Drive) is also nearby. It’s a crowded, tourist-centric area with lots of kitschy things to do and many restaurants. While we tend to avoid this area because of the crowds, there are nonetheless some crowd-pleasing options here. Marlow’s Tavern offers American tavern fare in a modern, relaxed atmosphere with great hand-crafted cocktails. Café Tu Tu Tangos is a vibrant tapas-style restaurant with a great atmosphere. The walls are ever changing with Orlando’s hip local artists. Bahama Breeze, a casual restaurant, has a nice menu, terrific specialty drinks and feels very Caribbean in design and flavor. If you have your children with you and it rains, as October is still considered the rainy season, WonderWorks on I-Drive is a great option. It’s like a science museum combined with a Ripley’s Believe It or Not and looks like an upside down building. There's a Ripley's in Orlando as well.

Additional restaurant options within an easy drive of the conference hotel can be found on restaurant row on West Sand Lake Drive in the Dr. Phillips area. Our personal favorites are: Seasons 52 with a seasonally-inspired menu, lots of great wines by the glass and mini indulgences that are incredible; Roy’s, a high-end restaurant with exotic Pacific Rim specialties; and Rocco’s Tacos & Tequila.
“Orlando and the surrounding area have grown into a foodie’s paradise.”

Bar, an authentic Mexican restaurant that is both fun and delicious. A hidden gem in this area is The Pharmacy, a speakeasy type of bar that offers hand-crafted organic tapas and some of the best drinks in Orlando. And it really is hidden behind old elevator doors!

For something off the beaten path, an easy 25-minute drive north takes you to Winter Park, an idyllic community created by northern business tycoons in the 19th century. Its tree-lined main street, Park Avenue, is aptly named and is populated by unique, upscale boutiques and wonderful restaurants/bars. It is also home to The Morse Museum, located at 445 North Park Avenue, which houses the world’s largest collection of Louis Comfort Tiffany’s works including his lamps, windows and jewelry. Winter Park is also home to Rollins College, Florida’s first private college that has a beautiful campus. You can also take a scenic boat tour of the Winter Park chain of lakes and see many mansions built along the lakes, located at the east end of Morse Blvd, www.scenicboattours.com.

While you can’t go wrong with any of the restaurants in Winter Park Prato, a swanky farm-to-table restaurant offering an ever-changing menu using local ingredients, is always excellent. The Wine Room showcases over 156 hand-selected wines that can be sampled by 1oz, 2.5oz or 5oz pour sizes via state-of-the-art wine dispensing machines. You purchase a card that is then used to purchase wine from these elegant “vending machines”. They also have a place to sit and enjoy artisan gourmet cheeses and breads while sipping your favorite glass of wine. If you prefer vegetarian food or feel like being adventurous, Ethos is on your way back to the Hilton at 601B South New York Avenue, Winter Park.

Another afternoon can be spent walking around the Leu Gardens. This is a 50-acre botanical oasis in the heart of downtown Orlando, about a 30-minute drive north from the conference hotel. Self-guided tours are $10 and include a beautiful rose garden and the turn-of-the-century home of Harry P. Leu.

While exploring the downtown Orlando area, take some time to visit historic Church Street, near the Amway Center, home to the Orlando Magic. The historic Church Street Station area offers an eclectic mix of dining, entertainment and bars. Food options run from tapas at Ceviche Tapas Bar and Restaurant to burgers at Hamburger Mary’s which was voted best burger in Orlando. Within walking distance from Church Street is another delicious farm-to-table concept restaurant called The Rusty Spoon. Right next to Downtown Orlando is the quaint Thornton Park. This nightspot on cobblestone streets is a great place to enjoy dinner at restaurants like Dexter’s, Graffiti Junktion, or Wild Side BBQ.

For shopping, Orlando offers numerous Outlet Malls where international and domestic travelers alike load up on bargains. The concierge of your hotel can direct you to a nearby outlet mall.

There is also The Mall at Millennia off of Conroy Road. This mall has many prestigious retailers with Neiman Marcus as an anchor store.

A 60-minute drive east of Orlando on route 528 will take you to the Kennedy Space Center and Daytona Beach. A 45-minute drive will take you to an airboat ride where you can see alligators and eagles at Twister Airboat Rides near route 520 and 528. Whether you choose to enjoy the theme parks or some of the other options Orlando has to offer, you’re sure to have a wonderful time.

“Having been to all Cirque shows in Vegas, we find this show (La Nouba in Orlando) is one of our favorites.”
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Family-run Market Research Business: 5 Love Stories
According to an Economist November 1, 2014 article, founding dynasties account for some of the world’s largest multinationals, from Walmart to Mars, Samsung to BMW. Family-controlled firms make up about 19% of the companies in the Fortune Global 500.

And family-run businesses seem to pervade our world of qualitative research consultants as well. I don’t know the number of family run firms among QRCA membership, but by observation there are many: ranging from small two person shops to multi-generational dynasties with global reach.

I’ve been curious about this and have wondered what the ingredients are for a successful family enterprise. How do these firms manage to run the business without hurting the relationships? Borrowing a metaphor from violin tuning…how do they manage to keep just the right amount of tension to make music together, yet not so much as to break the strings? What are the joys? What are the challenges? What advice might these members offer new professionals who are considering a family business model?

I spoke with QRCA colleagues who are principals in five family businesses: Michael & Helen Karchner; Joan Shugoll, Merrill Shugoll & Cara Shugoll; Ilka Kuhagan & Janina Kuhagan; Patrice & Patrick Woolridge; and Pat Sabena. The businesses presented a good mix of spousal partners, mother-daughter pairs, large family enterprises, US based and international companies.

Their situations are different, yet there are overarching themes. Here are nuggets of their stories.

Mike & Helen Karchner

Although arriving into the research industry from different backgrounds, Mike initiated his career as a client-side market researcher and Helen pursued a path via communications, insurance, and academia. Their dream was realized when Mike’s early career was redirected by layoffs from the supplier side. With a desire to have more control over their future, they collaboratively launched KMR in 2003. Helen’s involvement in the business was “organic,” as Mike needed help in some areas where Helen had particular strengths. They pooled their talents and a wealth of knowledge across a myriad of industries. With a young family, initially Helen spent more time working behind-the-scenes writing proposals, facilitating client relationships, handling project and field management, while Mike was the public face in moderating and traveling. Over time the business and the roles have expanded for each. KMR is more than just Mike & Helen, including a full-time field coordinator on their team, and part-time contracted support staff. They also have a college internship program in which they take great pride in mentoring several new interns each semester. The Karchner’s two sons, Mike Jr. and Jeffrey, have also contributed to projects for the firm from coding content to sprucing up presentations. Even though they are heading to college soon, there will always be a place for them at KMR.

Helen and Mike shared three pieces of advice to keep in mind:

- In business (as in marriage) it won’t be roses all the time. Fighting is healthy. They work through the thorny problems (like project pricing) by keeping in mind the end goal, which is to run a profitable business.
- While they talk about business all the time they also know how to say, “I’m done.”
- Establish boundaries. (“There’s a door on the offices for a reason!”)
- Enjoy the opportunity to recognize each other’s talents as you develop both professionally and personally.

Joan, Merrill & Cara Shugoll

Shugoll Research is a multi-generational story. Joan founded the company in 1957. From a tiny operation in her apartment, the business now employs 35 full-time people and 150 part-timers. Joan is the heart of the operation and is still very active. She coaches the recruiters and back office staff. Daughter-in-law Merrill is President (focusing on qualitative research), son Mark is CEO (focuses on quantitative and non-profit work) and daughter Cara is Research Director and the lead on new technology.

When Merrill first married Joan’s son Mark, she was already accomplished in a career in advertising but ripe for a change, as she wanted to reduce her workload and start a family. Meanwhile Joan had more demands on her to grow the business to meet her clients’ needs. Merrill offered to help her bring Shugoll Research into a full service enterprise and a close business relationship was added to their deep friendship.

The dinner conversation at the Shugoll household was lively as the family members are active in the arts, the community, and of course running a demanding and growing business. While company matters always piqued Cara’s interest she was not pushed into it, but encouraged to identify her path. After receiving her MBA, she worked for other market research companies before coming on board at Shugoll.

Words of advice:

- A family business is not for everyone.
- Giving and receiving feedback is hard, but be honest with yourself and each other. You can’t afford to protect feelings if that interferes with the function. Merrill related a challenging situation when she prefaced feedback to Cara by saying, “I’m giving you feedback as your boss, not your mother.” The situation was resolved and the relationship was preserved.
- Don’t let your personal relationship suffer from working together. These are family members who enjoy each other’s company, and though they spend a lot of time working together, they also make the time to socialize with each other away from the office.
- Learn how to best leverage and speak to each person’s strengths.

Ilka & Janina Kuhagan

After an initial career in consulting, Ilka started her business part-time when her three children were quite young. Bright and curious by nature, Ilka’s son and daughter started working on small projects for the business including coding and developing the company website. While in

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boarding school, Janina became fluent in multiple languages, and by the time she was in university started translating for some of Ilka’s projects. Her involvement in the company evolved from being the behind-the-scenes note-taker to participating in debriefs and asking Ilka to explain why she probed in certain ways. Before long, Janina was co-moderating projects and then taking on clients of her own. Ilka encouraged her daughter to expand her knowledge of research and creativity. Janina has recently joined another company in order to gain a broader base of business experiences on the client side.

It’s clear that mother and daughter like and respect each other enormously, and Ilka takes great pride in her daughter’s talent and commitment. But there have been some challenges as well as joys in working together—as expected when your mother is your boss!

**Patrick & Patrice Wooldridge**

They started their business in 1991. Patrice’s first careers were in education, then advertising. Patrick was a firefighter and a paramedic. Wanting to have more control over her work life, Patrice decided to launch a qualitative research business, and Patrick, disheartened at the abuse he was seeing as a paramedic, was ready for a change as well. While the two had a strong marriage, they ran into some work difficulties at the onset of launching Wooldridge & Associates. They drew this analogy: Patrice is into individual sports, and Patrick is a team sports guy. They worked it out successfully by creating a clear demarcation of roles and responsibilities. Patrice is the public persona of research at the company, and Patrick is the behind-the-scenes manager of technology and systems, finances, proposal and report editing.

**Their advice:**

- You have to develop the right chemistry to work well together.
- Have true respect for each other, even when you totally disagree—don’t let business disagreements devolve into personal attacks.
- Maintain independent interests too.
- Patrice and Patrick have mastered the art of running a successful business while also nurturing their spiritual lives as avid practitioners of Tai Chi and meditation.

**Pat Sabena**

Pat’s story can be summed up as “knowing when it’s OK to move on.”

Pat is one of the doyens of our business, having founded her research company in 1965. Like many others in our industry, Pat started her career in advertising. She holds a unique position specializing in psychological research for categories and products in the realms of pleasure and pain.

Widowed at a young age with four young children to support, Pat launched her business, and it had to be a success. She worked hard and built a strong clientele working independently. Over time, her eldest daughter Nicole became intrigued with the work but agonized for years before asking her mother whether she might participate in the company. For Pat, an only child and self-described loner and a perfectionist, it was questionable whether it could work out. Pat asked Nicole to get her credentials first in marketing, work in a research facility and get training at RIVA. Like Janina Kuhagan, Nicole’s early involvement was tape transcription and note taking in the back room. By 2000 she was officially on the payroll at Sabena Qualitative Research Services. Pat and Nicole worked collaboratively and did projects separately. Pat took pride in the excellence of her work and that clients would ask directly for her daughter.

Their business was robust for several years and then economic downturns affected the health of several key clients. Nicole decided it was time for her to do something else. Her client work in healthcare stimulated a desire to pursue education in medicine; she will be graduating in 2015 with a degree as a Physician’s Assistant. The financial strains made it easier for Pat to let Nicole go and be back as a solo practitioner. An added benefit is that Nicole is able to do her own thing, outside of the shadow of her mother.

**Pat’s Advice:**

- Family businesses can be very successful if the relationship is strong, the partners have great respect for each other and can work out the dynamics of control and perfectionism without damaging the relationship.
- However, Pat, unlike others I spoke with, was more pessimistic about the future of independent businesses in market research. The business of research is changing dramatically, and she doubts that this business model of independent qualitative practitioners will survive over time.

**What can we distill from these individual stories?**

While there were different situations leading to the creation of each business, there were several overarching themes. Successful family businesses at their root are love stories.

1. The members deeply love and respect each other, and they love the work they do.
2. They have their eyes on the goal of being a financially successful business, not a family hobby.
3. Business operations are well beyond the 9-5. But even though business spills over to family time, family members make sacred time just for the family.
4. There is an honest assessment of the skills, talents, temperament and shortcomings of each member.
5. Business roles and responsibilities are clearly demarcated.
6. Collaboration is highly valued.
7. Children who come into the family business are encouraged to get additional training and work experience on the outside.
8. Business owners are proud of the fact that they are family businesses; they don’t hide that status from clients.
9. When they hire from the outside, they form close bonds. They take time to coach and mentor others.
10. Family Members know that they have to go in with eyes wide open. There will be fights and disagreements, and they have learned how critical it is to not let issues fester. They talk it out, give feedback and kiss each other good night. (And in the Wooldridge household they take it a step further and continue a practice started when they first married…to bless each other at the end of the day.)

Based on conversations with:

- Michael & Helen Karchner, Karchner Marketing Research
  www.kmrinsights.com
- Joan Shugoll, Merrill Shugoll and Cara Shugoll, Shugoll Research www.shugollresearch.com
- Ilka Kuhagan & Janina Kuhagan, IKM
  http://ikmarketing.de/
- Pat Sabena, Sabena Qualitative Research Services
  (Nicole Sabena Faegan) www.qual.com/
- Patrice & Patrick Wooldridge, Wooldridge Associates Inc.
  http://wooldridge.com
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TEN CROSS-CULTURAL AND PSYCHOLOGICAL INSIGHTS TO HELP YOU BECOME A BETTER MODERATOR

Times have changed. Very rare is the Anglo-Saxon qualitative researcher leading all-white focus groups. Not only do many of us descend from a mix of ethnicities, so do our participants. As a multi-lingual (fluent in eight languages) researcher and therapist, I’d like to share several cross-cultural and psychological perspectives that have proven helpful in my qualitative practice.

An example of a complex cultural self-identity

A friend of mine, Jorge, has a complex self-identity. He was born in New York City to two monolingual Spanish Puerto Rican parents, a father with blond hair, blue eyes, and white skin, and a very dark-skinned Afro-Hispanic mother. My friend is olive-skinned with very curly black hair and has African and Native American facial features. His brothers’ and sisters’ skin tones range from very light to extremely dark. As Spanish was spoken at home, he is completely fluent in that language, but he considers himself English-dominant, as he grew up in and was schooled in the U.S. His family was Roman Catholic but he converted to Judaism when he got married. Jorge sometimes Anglicizes his name to George, although he tenaciously clings to his surname, Gonzalez. Jorge is an example of a complex cultural mix, yet when you ask him, he will self-identify as “American,” perhaps elaborating with “Hispanic.” He hates it when people make assumptions about his ethnicity, while at the same time he loves the bonding he experiences with other Spanish-speaking people.

CULTURAL TOOLS

1. There are many shades of black, and even more shades of brown.

Within the African-American population, many of your participants born in the U.S. may have parents or grandparents from Central or South America, the Caribbean, or one of Africa’s nation-states. They might speak a language other than English at home, and often these participants come from a mixed ethnic/racial background.

People from the Dominican Republic or Puerto Rico, both multiracial societies, might be very light skinned (basically white) or have an extremely dark complexion and they may self-identify depending on their racial mix or ethnic background. Be careful not to label participants based on your eye. For example, calling a Puerto Rican “White” or “Black” could be insulting if their country self-identification is stronger than their racial one.

Remember, participants know themselves much better than you ever will, and if you ask, rather than label or tell, they...
will be very likely to share. If asking, model what you’re looking for by referring to your own culture [we all have one, whether it be all-American (White), English (even if generations ago), Brazilian, or Ugandan]. Remember that language, country of origin, culture of origin, religion, and race are all distinct (although sometimes overlapping) and should be addressed separately, at least at first.

2 Language is everything.

Whether or not you speak the native language of participants, you can still be a sensitive practitioner. Ask participants what their language of origin is during your warm-up, and maybe even have them repeat a few words or a set phrase in that language during your warm-up.

3 A little knowledge goes a long way.

If you know your participants’ cultures beforehand, do research about the countries they come from and perhaps learn a word or phrase in their languages. This is standard advice for travelers to foreign countries and the same holds true for qualitative research. You’ll find the participants will warm up to you more quickly and remain more open throughout the research.

4 When you don’t know or are unsure, ask.

No one can be expected to be an expert on every culture. Moreover, some countries, like India and China, contain multiple subcultures. Most people enjoy talking about themselves and are delighted that you have the time and interest to ask.

5 Recognize the role and importance of culture on an individual and on a group during your interviews.

Depending on the level of homogeneity of your group, you can explore the effects of their cultural backgrounds as it relates to your topic in varying levels of depth. By making participants experts in something, i.e., their own culture, you not only invite feedback but help balance the power dynamic, which makes for more participation and better-flowing, more enriching discussions.

PSYCHOLOGICAL TOOLS

6 Engage your participants.

This basic tenet of therapy has everything to do with results and actionable insights. By engage, I mean involve, question, elicit, ask. When participants feel that their input is valued and useful, as well as appreciated, they are much more likely to share freely.

7 Reach for feelings.

Behind almost every thought, there is a feeling. Your research will be enhanced by adding an emotional layer of meaning. Moreover, feelings do really come in layers—it really is akin to the proverbial peeling of the onion. Simple phrases such as “how does this product/service/etc. make you feel [about x]?” or “Is there an emotion behind that?” will deepen your research.

8 Validate, acknowledge, question.

Without making an example out of any one individual, recognize what is being shared by participants. In your groups, explain the importance of what they have just shared (to your clients and/or to the research study). When participants feel valued and recognized, they speak more freely and dig deeper.

9 Cultivate an atmosphere of trust.

For example, in your opening remarks when you ensure confidentiality, take the opportunity to note that all comments are valued and will be respected. Establish your credibility not only as a moderator but also as a person—one who is open, kind, and cares about others. It may seem that details such as these are superficial or unnecessary, but actually they put the human factor into research, which in turn generates results.

10 Create a warm, close, and inviting atmosphere.

One of the easiest ways to do this as a moderator is by admitting and showing that you’re not perfect. Recently, during a Portuguese men’s shaving focus group, two of the participants had similar-sounding names and I kept mixing them up. In the end, I made a comment somewhat akin to “this darn hard Portuguese language will be the death of me!” and laughed. This joke provoked great hilarity among the participants and showed them that since I was human and could make mistakes, all they needed to do was “be themselves.” Ironically, my confessed imperfection led to a better discussion.

All of the pointers mentioned above are also in my therapist toolbox. For example, when a new client comes into my office, I bend over backwards to make them feel at home. I explain my intentions to help to the greatest extent possible and I tell them that I truly love my job. I express genuine interest in them as well as enthusiasm. I express that in therapy both parties are involved, vow to meet the client on their own terms, and to give as much as I take.

In social work school, practically the first thing I learned was “start where the client is” and that also applies to our work. As qualitative researchers, we notice which participants are shy, nervous, scared, or even domineering. And we address what might be getting in the way of their full participation. Like good clinicians with their clients, we stay in touch with our participants’ feeling-states and experiences.

Learning about how culture shapes our participants’ behaviors and beliefs begins with awareness. Culture is extremely complex and intricate, and almost everyone sees it in a different way. Immigrant, “melting pot” cultures such as those found in the U.S., Canada, Australia, and Europe, tend to produce citizens with different worldviews than cultures that are more homogeneous.
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EVERYONE IS CREATIVE

HOW TO MAXIMIZE INGENUITY IN THE GROUP RESEARCH SETTING

By Lisa Fuchs
- KL Communications, Inc.
- Red Bank, NJ
- lfuchs@klcommunications.com
When we convene research participants for ideation, what we’re really asking them to do is tap their creativity to come up with new products and services. Add to that the constraints of doing it at a set time and in a given location, along with a group of people they don’t know and may only be interacting with online, and you’ve got a pretty tall order.

But we firmly believe everyone is creative! Not only does psychology research back this up, but it adds a few more principles to the mix. Namely:
- Creativity is expressed in diverse ways
- All creative styles and expressions are useful—no one ideal type of creativity
- Creative diversity is described by four key variables (Jablokow, n.d.; Kirton, 2011):

<table>
<thead>
<tr>
<th>KEY VARIABLES THAT DESCRIBE CREATIVITY</th>
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</thead>
<tbody>
<tr>
<td>CREATIVE LEVEL</td>
</tr>
<tr>
<td>Our inborn and acquired capacity for problem solving and creativity</td>
</tr>
<tr>
<td>CREATIVE STYLE</td>
</tr>
<tr>
<td>Our characteristic preferences for responding to and seeking to bring about change</td>
</tr>
<tr>
<td>MOTIVE</td>
</tr>
<tr>
<td>Provides and channels the energy we need to think and act</td>
</tr>
<tr>
<td>OPPORTUNITIES</td>
</tr>
<tr>
<td>The access to resources and chances to learn and be creative</td>
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Based on the four variables of creativity identified, what if there were certain conditions that we as marketers could create to foster creativity? For example, could we appeal to different creativity styles for different phases of co-creation or to motivate participants so that they take advantage of the opportunity to create?

The answer is a resounding “Yes!”

We conduct our group co-creation projects in the context of ongoing online co-creation communities, powered by our proprietary CrowdWeaving™ process. Our process involves the following phases:
- Ideation: Participants are presented with a creative challenge and asked to generate ideas to address the challenge.
- Collaboration: Participants work together to make the ideas stronger.
- Evaluation: Participants rank ideas to indicate which ones they believe are the strongest.

Participants typically earn an incentive for their efforts, and incentive amounts can vary by the amount they contribute.

We tested the theories behind these tips specifically during the ideation phase of our process (more on that later!), but the following tips can be applied to almost any group qualitative project.

1. **Recruit for respondent motivation rather than creativity type/level:** As we said before, everyone is creative, so don’t worry too much about whether people have specific creative skills. An IT developer is just as creative as a visual artist; they just express their creativity in different ways.

   The success of your project will be selecting participants who are motivated—to share, express, and engage with the community. Motivation is one of the four key variables that affect creativity; participants who are inspired and motivated will make time to complete assignments. To increase the likelihood of selecting a motivated participant, look for affinity with the brand/institution, interest in the subject, desire to earn an incentive, etc. (Of course, continue to screen for participants who are comfortable sharing and expressing their ideas.)

2. **Take the time to make respondents feel comfortable before you ask them to open up and share:** Remember the IT developer and the visual artist? Well, the artist might be a natural speaker in the group setting, while the IT developer might be less inclined to share his ideas. But we want the benefit of both the innovative and adaptive points of view—and collaboration is just as important as ideation.

   For instance, try priming the group by opening the project with a more general question-and-answer session, where participants can get to know each other a bit, familiarize themselves with the study environment, and ultimately feel comfortable opening up and letting their creative juices flow. This session can be more general, but still touch on the topic at hand.

3. **Include both independent thinking and group brainstorming exercises:** In groups, adaptive and innovative participants build on each other’s strengths. Start with an independent thinking exercise such as asking participants to write down their ideas before sharing with each other. The independent thinking session encourages creativity and generates more original ideas than an open, around the table exercise. In addition, it will set the stage for a robust brainstorming session once the ideas are shared. Here, brainstorming together, adaptives and innovatives play off of each other’s ideas—an innovative may suggest an “out of the box” idea and an adaptive might refine the idea with tried-and-true solutions to ultimately create a viable concept.

   An idea crafted in a masked environment can spark the creative fire for a new, more robust idea during the group brainstorming phase. As the Boss (Bruce Springsteen for all of you youngsters) once said, “You can’t start a fire without a spark.”

4. **Open the forum after a few ideas are posted:** The goal of opening the forum after an initial period of closed ideation is to encourage participants to feel comfortable and confident sharing their ideas. More so with adaptives—but even with innovatives—some participants need additional inspiration to think of solutions to problems or challenges. They appreciate that spark of an inspiration from reviewing another’s ideas that gets their creative flame going.


### Table 1: Adaptive or Innovative Style

<table>
<thead>
<tr>
<th>Adaptive Style</th>
<th>Innovative Creative Style bar-bell</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) concerned with solving problems rather than finding them,</td>
<td>(a) seemingly undisciplined, approaches tasks from unsuspected angles,</td>
</tr>
<tr>
<td>(b) seeks solutions to problems in tried and understood ways,</td>
<td>(b) treats accepted means with little regard in pursuit of goals,</td>
</tr>
<tr>
<td>(c) maintains high accuracy during long stretches of detailed work,</td>
<td>(c) capable of detailed tasks only in short bursts,</td>
</tr>
<tr>
<td>(d) rarely challenges rules,</td>
<td>(d) provides the dynamics to bring about periodic revolutionary change,</td>
</tr>
<tr>
<td>(e) sensitive to maintaining group harmony, and</td>
<td>(e) has low self-doubt when generating ideas</td>
</tr>
<tr>
<td>(f) provides a safe base for the innovator’s riskier operations</td>
<td></td>
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</table>

Where are you on the Adaptive – Innovative Creative Style bar-bell?
Some participants need a nudge or feel shy posting their ideas. We find that opening the forum after a few ideas are posted encourages further participation.

5. Lay out clear expectations for each challenge: Clearly present the opportunity that the challenge presents for participants—let them know how their ideas will be used, and what they may be helping to influence. Provide guidelines for participants, so they know exactly what’s expected of them and understand the problem they are being asked to solve.

While we encourage creativity, we also want participants to stay on topic. Clear expectations help adaptives, who tend to follow rules and may need the guidance in order to successfully ideate, as well as innovatives, who need boundaries to keep them from venturing too far off topic. These expectations, coupled with a clear explanation of the opportunity presented, motivates participants to fully engage.

Creativity Case Study

In April 2014, KL Communications and Columbia University conducted a CrowdWeaving co-creation challenge among alumni volunteers to explore:

- Who participated the most in co-creation challenges: innovators or adaptors?
- Does asking masked ideation questions (asking participants for ideas before they can see what others wrote) work better for innovators or for adaptors?

The results were encouraging. Even when exposed to different ideation approaches, participants—regardless of whether they exhibit an adaptive or innovative style—participate equally. Even after the ideation phase, participants equally collaborated on and evaluated ideas, illustrating that a co-creation challenge can appeal to all creative styles when the opportunity is clear and expectations are well defined. Further, different methods can be employed to motivate people of different creative styles and levels to participate.

Remember, we’re all creative! With specific attention to the different stages of the group ideation process, we can maximize the contributions of each individual, no matter their creativity style, level or motivation.

During the ideation phase of our case study, significantly more volunteers posted ideas to the masked forum than to the open ideation forum. However, when reviewing the number and types of ideas generated by participants with different creative styles, the frequency of ideation was similar within both the masked and open environments. Further, participants posted the same number of ideas, regardless of creative style. Hence, we reconfirmed creative style has no bearing on the ideation method (masked vs open). Both adaptives and innovatives are equally likely to post an idea when presented with either method.

In a co-creation study, the keys to engagement come upfront in recruiting people who care about the topic (motivation) and providing them with interesting questions and activities (opportunity). How creative participants perceive themselves, or which creative style they exhibit, is secondary to motivation and opportunity when generating useful and plentiful ideas. The opportunity to create is born from motivation; by engaging all types of participants in a challenge, we can create the opportunity for them to ideate and collaborate.

Table 2: Volunteers, Methods, and Styles

<table>
<thead>
<tr>
<th>ALUMNI VOLUNTEERS</th>
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<tbody>
<tr>
<td>378 alumni volunteers</td>
</tr>
<tr>
<td>166 active participants</td>
</tr>
<tr>
<td>Split sample into two demographically similar groups</td>
</tr>
<tr>
<td>Conducted a creative challenge in each group</td>
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<table>
<thead>
<tr>
<th>TESTED: TWO IDEATION METHODS</th>
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<tbody>
<tr>
<td>Masked Ideation: Participants must post ideas before seeing other ideas (82 active participants)</td>
</tr>
<tr>
<td>Open Ideation: Participants could see other ideas prior to posting their own idea (84 active participants)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ADAPTIVE AND INNOVATIVE STYLES</th>
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<tbody>
<tr>
<td>Question: For each creativity style, which ideation method best encourages participation?</td>
</tr>
<tr>
<td>Participants were screened for adaptive vs. innovative styles (65% adaptives and 35% innovators)</td>
</tr>
<tr>
<td>Both creative styles were included in each group</td>
</tr>
</tbody>
</table>

References:
RIVA TRAINING INSTITUTE

- Principles of Qualitative Market Research - 9/28/15
- Moderator Training:
  - Fundamentals - Offered twice a month
  - Skill Acceleration - 8/24 – 26/15
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- Fundamentals of IDI Moderating - 8/17 – 19/15
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The world is shrinking and becoming more interconnected. Products and companies span nations and continents. Research agencies, large and small, increasingly must have a global qualitative research view to adequately serve their clients. Fortunately, today, all researchers can do that, anywhere, anytime.

“Today anyone can do global qualitative.”

For decades, market research on a global scale was the purview of the large global research agencies. These multi-national organizations bought or established offices in dozens of countries to serve multi-national corporations. Far-flung offices provided access to local researchers and respondents and shipped the results to the central office to be compiled into a single, comprehensive global research report. Projects required time and resources and a small army of researchers scattered around the world to complete.

Those days are over. Communications and research technology have leveled the playing field.
Fortunately, just as communications technology is helping us access researchers and respondents everywhere, research technology is allowing us to work faster and more efficiently than ever before. Global capabilities are now within the grasp of every qualitative researcher.

Interconnectivity: A New Global Normal

Access to the Internet through computers and mobile devices is a global phenomenon that opens markets and levels the playing field among large and small researchers.

The key is Internet access. In the more developed countries, virtually any online qualitative method can be used. Most of these methods were developed for such environments, and they provide a wide selection for the researcher.

When 60% of households have access to the Internet, online qualitative goes mainstream. In the U.S., online qualitative became accepted as a viable research method in 2006 when household penetration surpassed 60%. We have seen a similar trend in Europe and Oceana/Australia. From an Internet access perspective, we will consider these three areas as the “Developed world” and the remaining four as the “Developing world.”

Today, even the lone research practitioner has access to researchers and respondents virtually anywhere, anytime. A quick check of the QRCA membership shows at least 75 researchers who live outside the U.S. and Canada available to QRCA members, and are as close as a phone call or an email. Access is no longer a limitation.

Moreover, as researchers, we have an obligation to our clients to develop a world research capability. Today, no region of the globe accounts for more than 40% of research expenditures. If we are to serve our industry well, global capabilities are imperative.

3 New Ideas for Developed Markets

High broadband Internet and smartphone penetration make online research in the developed countries of North America, Europe and Oceana/Asia rela-
“There are now more mobile phones in the world than people.”

tively easy. The researcher has the entire spectrum of new online and mobile technologies available to him/her. 

Virtual Intercepts. Mall intercepts were once a mainstay of market research. Today, our respondents are living online, not at the mall. Why not find them online and recruit them directly to a qualitative interview? Create a link from any digital source (Facebook®, a webpage, an email, etc.) that directs the respondent to a screener. If they pass the screener, they can be directed into the appropriate qualitative method (live webcam or mobile interview, bulletin board, chat, etc.). 

Live Mobile Ethnography. In these developed markets, a high percentage of respondents have smartphones. Why not interview them in their home, using their smartphone? It’s a live interview with the freedom to move around the house as the interviewer directs. A researcher studying dishwashing detergent can literally look under a dozen kitchen sinks in a single day in a dozen different countries. This methodology will be commonplace in a few years.

Simultaneous Translation. Researchers seem to be most intimidated by language differences. Today’s technology is removing language as a problem. Virtually all technology providers have options for simultaneous translation of live interviews. Clients and researchers can follow the discussion, gather insights and provide direction in near-real time.

Translation of text is even more exciting. “Machine translation” is dramatically improving. Even more interesting is crowdsourced translation that translates a large amount of text very quickly utilizing a dispersed pool of human translators. This cuts translation time from weeks to hours.

Research in Developing Markets

Developing countries are a challenge. Here’s where the large global agencies have a significant advantage. However, smaller agencies can compete if they identify local partners and are smart about using the appropriate technology.

A local partner can make or break a study, particularly in a developing country. Often, language and cultural barriers are significant and require a native to navigate the nuances. A native qualitative researcher can moderate and provide insights that a non-native would simply overlook. Luckily, there are many sources for partners, such as QRCA.org.

The local partner can also help identify qualified recruiting firms. Some cultures are fairly sophisticated with phone banks and in-house panels; others continue to utilize on-the-street recruiting. If you choose not to enlist a native researcher, you will need to find a recruiting source by networking with your current suppliers or through one of the many directories available to researchers.

In developing areas, Internet access does not necessarily mean high bandwidth. Many people access the Internet using mobile devices, others simply do not have high volume broadband. Therefore, it’s usually a good idea to stay away from video- or audio-centric technology that requires more bandwidth than respondents may have available.

There are now more mobile phones in the world than people. In many developing countries, mobile access is voice-only and often does not include a data plan. For instance, Africa has a 75% mobile penetration rate, yet it has one of the lowest Internet access rates in the world. Even smartphone penetration is not always a good indicator of Internet access as data plans are very expensive in developing countries. Researchers often make the mistake of assuming that a high mobile penetration rate equals high Internet accessibility. This is often not true.

3 Smart Choices for Developing Markets

Each developing market must be evaluated separately. Countries that share a boundary could have vastly different technology adoption profiles. Before selecting a methodology for a specific market, understand the technology adoption and use profile of that specific market, not just the region.

Bulletin Boards are a good technology solution for respondents who may have access to computers and the Internet but may not have strong bandwidth. It’s a versatile methodology and able to run on fairly low bandwidth if there are no audio, video or picture requirements. Bulletin Boards are also available in many languages, and new languages can be added fairly quickly. Crowdsourced human translations are generally available within hours of a respondent’s post. Since most have some type of smartphone app, they can also be used in applications where respondents have smartphone access.

Digital Ethnography is used in many developing countries where respondents can upload pictures from a mobile phone to document their day or a specific activity. Such digital ethnography allows the researcher to spend “a day in the life” of several respondents in several countries in a very short amount of time.

Telephone Depth Interviews (TDIs) are always an option. In less-developed countries, Internet access and smartphone penetration are both low. However, mobile phone penetration is very high. Researchers can work with a local partner to conduct TDIs on mobile phones while the researcher and the client listen, learn and direct using simultaneous translation. Since most mobile phone users in developing countries use pre-paid phones, respondents can be paid by adding minutes to their phone as an honorarium.

The World is Our Oyster

The adage to think globally and act locally has never been more true. Now anyone can. Communications and research technology are shrinking our world and creating opportunities for us to conduct research we never dreamed possible a few years ago. This technology is bridging the gaps in distance, language and culture that once divided us. It’s a new world. Let’s embrace it.
What are top qualitative researchers saying?

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Having already watched the film trilogy a number of times, I wasn’t really paying attention, until I heard him shriek. I looked up, not quite sure of what the issue was, to find him pointing at the television in confusion asking, “Mommy, where’s my program? Where did Buzz and Woody go?” I looked at the television with the realization that my son was watching a television commercial for the very first time in his life. Up until this point, all of his video had been consumed on an array of platforms that were largely streamed without commercial interruption.

The day I took him to see Disney’s *Frozen* reinforced this insight. No sooner had we returned home than he began to ask incessantly to see it again. I told him I wasn’t taking him back to the movie theater, and he corrected me saying he wanted to watch it “now”—either on our television or on a tablet. I tried to explain why this wasn’t possible, but he seemed to think it was all a ploy to pre-
Video is portable, time-shifted, uploaded, downloaded, streamed, tweeted, co-created and kick-started. Three of today's top five video-streaming platforms—YouTube, Netflix and Facebook—got started in the last decade. When it comes to gauging pop culture or generalizing about audiences, it's hard to know where to begin when TV—arguably, the very heart of video—can no longer be clearly defined.

It's with this new paradigm that NBCUniversal's *The Curve Report* (TheCurveReport.com) explores video trends, speaking with visionaries at the forefront of what's next in the wide world of video. In this article, I will be sharing three of those trends that are reinventing what we're watching and how we're watching it: "Nichework Execs," "Popular Flick" and "Selfie Celebs."

**Nichework Execs**

Without the pressure of mass viewership, online video formats offer creative freedom to be quirkier, riskier and more tailored to specific audiences and topics. "Nichework Execs" is an emerging trend that is the natural evolution of broadcast media fragmentation. Niche content allows audiences to explore things they love, resulting in an enriching viewing experience.

Creators are engaging with fewer people in a deeper way, but the results of this approach are somewhat changing. For example, *Tastemade*, a YouTube-only channel, features shows that are a bit too niche and hyper-specialized for The Food Network; they feature shows like *Raw. Vegan. Not Gross.*, where one episode might reach 55,000 views, but total viewership for the show is an impressive 13 million visitors per month. By creating content specific to niche food audiences and reaching a fan base, they are demonstrating not only how to exploit a niche topic in a digital format but also how to create scale.

**Popular Flick and Social Viewing**

While 65% of adults ages 18-49 are eager for content that's just for them, a strong 60% "miss the days when everyone watched and talked about the same TV shows." These audiences are looking for content that matches their interests as well as the camaraderie of social viewing.

Social media is becoming the virtual livingroom, particularly when you consider that the fastest growing household in the United States is single-person households. It's also playing a larger role in what content "makes it" and what content gets made.

Popular conversations in social media are playing a much more central role in Hollywood's entertainment ecosystem, and this is partially attributed to the fact that we've reached a tipping point with Twitter penetration. Nearly half of all Gen Xers and Ys are regularly using Twitter; as content creators continue to hone their social media skills, sophisticated new social platforms are allowing audiences to wield more influence.

So, we find ourselves in a space where social media is no longer just a spotlight but can also serve as an incubator. It helps illuminate content that may have been "too niche" but, given the right environment, can organically grow, find fans and break through.

Consider how a network's fluency in social media can change the trajectory of viewship. Take ABC's political drama, *Scandal*, a mid-season entry for 2012 that launched to tepid ratings, but its over-the-top plot twists and OMG moments made it Must-Tweet TV. The show's cast and creator Shonda Rhimes regularly join in on the conversation via Twitter, tweeting across multiple time zones, making it that much more compelling for viewers to be socially engaged for each episode. Imagine how much different the arc of well-written shows like *My So-Called Life* or *Firefly* might be had they hit their peak during our current social media reality.

Next, I would be remiss if I didn't discuss the phenomenon that is *Sharknado*. Syfy's *Sharknado* took the world by storm in 2013. While the network had previously used the formula with mild success, this event was the perfect storm of nostalgia for Tara Reid and Ian Ziering, combined with our world's increasing anxiety and fascination with severe weather. At the time, it was the network's most social telecast
ever—racking up 5,000 tweets per minute. How did Syfy respond? They took advantage of the social skills they had developed and engaged in the viewer conversation, listening to viewer feedback to make future airings even bigger than previous ones.

In 2014, *Sharknado 2: The Second One* (named where else but on Twitter?) followed up with more of everything. The televised movie event garnered 3.9 million viewers and over one billion Twitter impressions, three times more than the first one, making it television's most social movie ever. Over time, we can expect the rise of social viewing and event television to increase, not decrease.

The evolution of social media will move from “Amplify” to “Storytelling” to “Storybuilding.” Right now, it's a huge amplifier, and we are in the early phases of storytelling. The next generation of storytelling hopefully will build on and integrate the conversations and stories that audiences are creating about the content they love.

**Selfie Celebs**

Digital-first celebrities are also changing how we define celebrity status. We started to see this shift with the advent of reality stars. Reality stars are much more accessible than traditional celebrities, and social media has been a huge catalyst for their increased access, popularity and fame. These “Selfie Celebs” are redefining celebrity yet again—with longevity, a wide reach and literally nothing between them and their audience.

Glozell Green is one of a new breed of direct-to-digital stars. She has 2.3 million YouTube followers who tune in to watch her impersonate Miley Cyrus, dole out advice and swallow a ladle of cinnamon. Digital stars are nothing new, but Glozell Green represents a shift away from yesterday’s one-hit wonders to these new digital Selfie Celebs who have longevity. These celebrities are also not necessarily looking to expand beyond digital. Their snack-sized content and not-quite-ready-for-Prime time approach are ideal for the digital sphere.

In addition to the Glozell Greens of the world, we are also seeing the rise of other unlikely stars such as professors, CEOs and DIY crafters who are able to create a cult of celebrity around them and their passions.

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**Here are four categories of digital video stars to watch:**

1. **The CEO Frontman**
   Digital presents an opportunity for digitally savvy CEOs to show another side of themselves or to simply showcase their product, brand or company. For example, Michael Dubin, CEO and co-founder of Dollar Shave Club, created a star-making video in his warehouse for a mere $3,500 that ultimately went viral in 2012, generating significant traffic to the company website, with a positive impact on the financial growth and endurance of his business.

2. **Rockstar Professors and How-To Gurus**
   When *The Curve Report* asked adults 18–49 which social pillar was most in need of reinvention, their response was “education” by a landslide. Student loan debt and the high cost of college education have left many students exploring alternatives such as massive open online courses (MOOCs). As more people are open to the idea of watching a lecture or course online, iTunesU surpassed a billion downloads in 2013. Lectures from Harvard University Professor Michael Sandel’s “Justice” course have been downloaded almost five million times, and other educators are moving into this rockstar category right along with him.

61% of Gen Xers and Ys have watched a video online to learn a new skill, and 54% say they would pay a small fee for a how-to video to learn a new skill. Sites such as Craftsy, Howcast and creativeLIVE are capitalizing on this trend. Everyday experts are creating revenue streams, whether it’s Laura Nownes, a quiltmaker featured on Craftsy, or Jared Montz, who runs an online soccer academy.

Perhaps most well-known of these how-to gurus is Salman Khan, the founder of Khan Academy. His grassroots education YouTube channel has over two million subscribers, and its videos have been collectively viewed over 500 million times.

3. **Ex-Pro & GoPro Athletes**
   Digital video also provides a great opportunity for athletes to showcase their epic feats. Basejumper Jeb Corliss uses the extreme first-person POVs captured with GoPro to take you on a journey with him as he flies off cliffs and navigates caves. Skydiver Felix Baumgartner wore a GoPro device as he jumped from the edge of space, transmitting this live experience to a total 52 million viewers.

4. **Six-Second Sensations**
   The arrival of Vine and Instagram videos marks an entirely new medium where micro-storytellers are thriving, producing some unexpected stars. The reigning queen of Vine, Brittany Furlan, with 3.7 million followers, has been featured on *Jimmy Kimmel Live!*, earned a sponsorship deal with Benefit Cosmetics, and has been compared with A-list funny girl Tina Fey. Photographer Meagan Cignoli became a full-time Viner after brands such as Lowe’s, Nike, and BMW began calling her just three weeks after she joined the platform.

A major shift is happening in the way people view, share, interact with and experience video. This is being driven by new technologies that are enabling consumers to take a driver’s seat and focus on content rather than on platform. It’s being driven by the democratizing force and creative freedom offered by the Internet and social media as well as by young consumers who are innovative and well-versed in all things video.

Attempting to forecast the future can be a bit intimidating, especially since the very heart of video is dynamic and can no longer be defined. And while this is obviously shaking up the way traditional broadcast media is being delivered, it’s also opening up the avenues for new innovators, creators and producers to take shape.
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Registration opens mid-July
Addressing the Elephant in the (Virtual) Waiting Room
Asking the Right Questions

By Foster Winter • Managing Director • Sigma Research Management Group • Cincinnati, OH • foster@sigmaresearch.com

Oh, the tales we could tell about research participants over the years. The automotive study where we were working with a full-sized prototype vehicle and our participant indicated that the trunk (or boot for those of you across the pond) would be large enough to accommodate his AK-47 and assorted other weaponry. It turned out he was a member of the local police SWAT team. Whew!

Then there have been the respondents we’ve encountered who were higher on something other than life. And the things we learned during the participant introductions, such as the woman whose hobby was collecting exotic cockroaches. There have also been the troublesome ones, those who are excused from a focus group through our universally clever device of the mysterious phone call at the front desk. And, of course, the obviously unqualified respondents.

But then there are those who are not so obvious—a group who have become known as the cheaters and repeaters.

Within QRCA, much effort has been expended on the cheater/repeater issue. Most recently, the QRCA Field Committee (FieldCom) conducted a study in 2013-2014 with the cooperation of Quirk’s and the Marketing Research Association (MRA). The study, which was conducted among QRCs, facility/recruiting personnel, and client-side researchers revealed that online/mobile recruiting is not considered as reliable as in-person/phone recruiting. While that is probably not a surprise, as more of qualitative research is recruited and conducted online it may very well be the elephant in the room.

Now, being a cheater—or even a repeater, in our context—sounds pretty sinister, doesn’t it? But, as was learned in the project undertaken by QRCA Philadelphia chapter members Laurie Tema-Lyn and Abby Leafe, there appears to be a vague perception among some of the cheater/repeaters that to skirt around screener questions is no more dishonest than driving 65 in a 55 MPH zone. To quote from their presentation, entitled “50 Shades of Respondent Gray,” cheaters may not always be aware they are cheating. Based on the interviews conducted with the cheater/repeaters (who were recruited via Craigslist), it was suggested that, for several of them, cheating in these situations simply doesn’t matter. Some even felt their experience in a category or with a brand means they will have more to say allowing them to be better participants.

However, I’m not so sure my buddies Tanya and T.J. are quite as innocent as the folks we’ve been talking about.

Yes, she was Tanya in the morning and T.J. in the afternoon. This happened during a series of interviews my company was doing the week following the QRCA Conference where Ted Kendall presented a session on online communities and cited examples of how some online participants “game” the system. And there she was in my research, as if to prove the point.

So, whether they are aware they are cheating or not, the problem not only persists but also has new dimensions with the increase in the practice of online recruiting, especially for online research where the Tanyas and T.J.s are generally not on camera (or they’re smart enough to move to a different room!).

Obviously the quality of recruiting for all qualitative endeavors is key. And like all other elements of the research project, it is affected by the age-old trifecta: quality, price, and timing.

So, let’s start at the beginning of the research process—the development of the research plan and proposal. At this point the QRC needs to determine how recruiting might be undertaken while considering the study objectives and the quality, price and timing issues.

Recruiting Partner Selection

Based on the various elements of the study, the QRC will consider field services, independent recruiters and/or research panel providers. We need to keep in mind that even if the research will be conducted face-to-face or by phone, chances are there will be an online element to the recruiting. The online involvement might be as minimal as email respondent correspondence or, as may be the case with an online panel provider, completely through online communication. Here is where we as QRCs need to keep our eye on the ball.

As the landscape of recruiting has changed over the years, we can help protect our research from the cheater/repeater/gamers by asking the right questions—and here, we’re not talking about during the research, but rather prior to the research. We need to ask questions of those who will be recruiting for us, as well as those who are prospective research participants.
Cheaters & Repeaters CONTINUED

Questions and Questions
We’re in the business of questions, so this should tie in very nicely. The research questions are second nature to us, but sometimes we need to be reminded to ask the correct pre-research questions.

Questions for recruiters:
Here are a few suggestions for vetting the field recruiters (from the QRCA Philadelphia chapter “50 Shades of Respondent Gray” presentation):
• How many people will be recruiting this? (Team approach is preferred.)
• How do you plan to recruit?
• How do you develop your database?
• How are recruiters incentivized?

They also suggested briefing not only the field service project manager but also the people who will actually be screening the project.

Online projects in particular may require recruiting a larger number and geographic spread of participants. Therefore, you may be considering the use of an online panel provider. The first level of consideration must be credibility. We’ve all gotten deluged with emails from sources claiming databases only slightly smaller than the population of the entire planet. We’re smarter than that—however, it makes sense to check for sources that do not sound too good to be true. Check with your colleagues and trusted partners, and QRCA members can inquire on the QRCA forum.

It should be recognized that there are panel providers who have only had online contact with their panelists. And, based on QRCA FieldCom’s Cheater/Repeater Study, online recruiting in itself is viewed as less likely to yield as high a percentage of properly recruited participants as phone recruiting. With that as a background it behooves us to make sure we are as conscientious as possible when using online panels.

Based on input from those who live in the world of online recruiting and panels, here are some suggestions for vetting those providers:
• Where are these panelists coming from? Do you have a database that you own, or are you renting open sample or using other resources?
• What history do you keep on your respondents? Do you track past participation? How do you know they are not professional respondents?

• Do you conduct a phone screen as part of your process? If not, how to do you verify authenticity of these respondents?
• What identity verification processes do you have in place?
• Do you have full contact details on your respondents? If not, how do you plan to pay incentives or re-contact them if required?

Participant screening questions:
There are some excellent tips for creating effective screeners from QRCA—including the FieldCom white paper, “Time for a Change: Confronting the Issue of Problem Participants in Qualitative Research,” (Fall 2014) which is available in the Member Resources section of the QRCA website.

For online projects, the platform provider can also help. If technology is an aid to those who would be cheater/repeater/gamers, there are ways to use technology to catch them. For example, in programming the online screener, one of these providers suggested that it is possible to:
• Make sure that only the original invitee’s email address is valid for a reply and only the first time/date reply from that email address is accepted.
• Add hidden tags into the programming so we can tell in the collected data if someone went back to change an answer, or if at any point they were disqualified. Regardless if they make it to the end, we know the path they took to get there.
• Make sure that hidden tags and other tricks are not easily viewed and do not show on the screen when View Code or similar request is made by the respondent in their browser.
• When reviewing the data collected, only accept the first attempt from a single computer, filtering out all second or duplicate attempts, regardless if a different email address is used.

• If a client list or the provider’s panel is used, every online survey should ask for basic demographic and contact info, which can be cross-checked against the person’s profile data on record. All those data points must be consistent in order for the person to be considered for qualification in the research study.
• Once considered, further cross-check the data they provided to make sure the area code matches the correct state and that the zip code matches the correct city.

Of course, unless it is totally impractical, once selected for research, each person should be phoned and asked one or two key questions again that were in the original screener for a final match.

The elephant in the room? Unless we have conversations about the ways to ensure whatever recruiting methods we use continue to be as bulletproof as possible—well, you can only imagine what that elephant will do.

“As the landscape of recruiting has changed over the years, we can help protect our research from the cheater/repeater/gamers by asking the right questions.”
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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.

Owen Shapiro is a market researcher, strategist and speaker. He’s the President of Shapiro + Raj, a Chicago-based strategic research firm. He’s also highly educated, having earned an M.B.A. from the University of Chicago (with a concentration in Behavioral Sciences), an M.A. in Social Sciences from the University of Chicago and a B.A. in Political Science from Reed College.

Shapiro co-authored a book with futurist David Houle about how cultural change and accelerating technological advancement are affecting brands called, Brand Shift: the Future of Brands and Marketing. The book begins with a history of brands and branding then moves quickly into an explanation of the forces at play in today’s rapidly changing environment (an age Houle first labeled the “Shift Age”). The book ultimately ends with the trends that will impact brands and provides strategies for brands to embrace to effectively navigate the changed landscape of the future. While Houle and Shapiro state, “Brand Shift: the Future of Brands and Marketing does not seek to be an authoritative or academic textbook on marketing,” the dog-eared, flagged and notes-logged pages of the review copy we received tell a different story.

Have a listen to the conversation Owen Shapiro had with QRCA VIEWS Online Qual/Tech Talk editor Karen Lynch.

If you would like to hear an interview with an interesting person in the field of qualitative research, please contact Mike Carlon at mjcarlon@mac.com

Check Out Our Newest Podcast with OWEN SHAPIRO, SHAPIRO+RAJ

Should qualitative researchers be thinking about adding mobile to their qualitative toolbox? Richard Owen, founder and CEO of Crowdlab says, without hesitation, yes!

Who is Richard Owen? Well, Richard has been in the market research business for over twenty years and has worked at prestigious firms such as Millward Brown, Copernicus, and Hall & Partners. Frustrated by the pace of change (or lack thereof) in the market research industry, Richard founded Crowdlab as a company designed to field high quality research empowered by bleeding edge technology to amplify the wonders of traditional research thinking and doing. If you want to know exactly what that means then you will have to listen to this podcast!

Now I know what you may be thinking—how can this help me as a qualitative research consultant or a buyer of qualitative research? Here are a few thought starters; what if instead of walking behind a shopper on a shopalong, you empower participants to keep a shopping diary using their mobile phone to answer questions, take pictures, and record video while on a real shopping trip and use that footage as stimuli for a one-on-one or group interview? What if you could get people who are in the shopping process for a new car to use their mobile phone to answer questions and capture video before, during, and after going to a car dealer? Mobile technology can help you do that, and you can learn more about these and other practical qualitative applications by listening to VIEWS Podcast editor Mike Carlon’s conversation with Crowdlab’s Richard Owen.

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Have you ever felt unsettled about the speed at which things are changing in the world? It can be unnerving to think about our growing dependency upon technology, the rate at which digital platforms become obsolete, or the way big data is gathered about us every time we click a link.

Settle your nerves by spending a Saturday afternoon reading a book coauthored by market researcher Owen Shapiro and futurist David Houle called *Brand Shift: The Future of Brands and Marketing*. In it, the authors authoritatively explain the dynamic of this rapidly changing environment. They cover the challenges facing brands in this era. They also outline specific brand management strategies helpful in tackling the challenges head on.

My recommendation? Read this book, deferring judgment as you begin. Initially, I was skeptical about Houle and Shapiro’s use of the phrase “the Shift Age” to describe our transition out of the Information Age into a time loaded with cultural changes and accelerating technological advancements. I didn’t buy into the phrase. However, within a few chapters, the pieces of the puzzle started to come together.

The first part of the book tells the history of brands and branding. Within these chapters, the authors cover Maslow’s Hierarchy of Needs (from physiological/safety needs up to Self-Actualization/Transcendence) and four phases of the communication media life cycle (disruptive, dominance, displacement, dormant).

By chapter five of the book my skepticism turned to intrigue. That’s when the authors explain that, through market research efforts, they uncovered three significant forces coming to light in the Shift Age: a flow to global integration, a transfer of power to individuals, and accelerating electronic connectedness. From the book, “Any marketing professional today must have a core understanding of these three forces, as they are the underpinnings of what brands and marketing are and will be during the next 10-15 years.”

Part two of the book focuses on key trends that will impact brands moving forward: a shift from institutional to individual power, the ascendancy of women, Millennials and Digital Natives (“the Shift Age” generations), the screen reality and something esoteric the authors call the Neurosphere, memes and movements, and transformative social change…and of course, big data.

Part three of *Brand Shift* focuses on the future. It explains a Brand Influence Index (a metric developed by market search firm Leo J. Shapiro & Associates). Houle and Shapiro suggest that, by addressing the highest levels of Maslow’s Hierarchy of Needs, marketers can move consumers up on the Brand Influence Index.

This final section of the book also covers social media’s role, something Houle and Shapiro call transactive brand-ing (thanks to the neurosphere), the psychological tension of the age and how brands can become a valuable resource for individuals in feeling the stress of the times.

The sixteenth and final chapter of the book gives tactical strategies for brands and brand managers, allowing them to effectively navigate the changed landscape of the future. Houle and Shapiro pull all the puzzle pieces together in a book that makes sense (even if you don’t fully comprehend the neurosphere). “Companies that fail to adapt this new reality will experience the Shift Age as an era of chaos and struggle. Companies that find ways to navigate these uncharted waters, it should go without saying, have a much better chance of surviving and thriving.”
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Norman K. Denzin, the author of The Qualitative Manifesto – A Call To Arms, is a professor of communications at the University of Illinois, Urbana-Champaign and the author of other books and journals about qualitative research including as the co-editor of the Handbook of Qualitative Research. The book cover refers to Denzin as “the leading figure in the qualitative community.” With such high accolades, I wanted to see what I could learn by reading this short, concise book.

This book was inspired by C. Wright Mills’ Sociological Imagination (1959), which Denzin read in 1963 when he was in graduate school. In that book, Mills “wanted his sociology to make a difference in the lives that people lead.” In The Qualitative Manifesto, Denzin directs his book “at all scholars who believe in the connection between critical inquiry and social justice.”

The Qualitative Manifesto is heavily grounded in sociology and how qualitative methodology can be used to influence social justice. Interestingly, Denzin frames an argument that the interpretation of qualitative data is made on incorrect understandings. “Persons mistake their own experiences for the experiences of others.” The basic argument is that data interpretation has to be based on the position of those being studied and not influenced by the researchers themselves.

Denzin also promotes the idea of qualitative researchers being connected and collaborative, both locally, nationally and internationally. Denzin’s desire is to “reform social research.” That said, he believes that “reform needs to be based on inclusiveness, not inflexibility, or narrowly framed arguments.”

Promoting the idea that researchers are an active agent of social change, Denzin shows how qualitative research can be used in the social arena to advance human rights through social reconciliation. Denzin also discusses the issue of quality and suggests the development of criteria for quality in the field while admonishing us all to try harder to write more clearly.

Delving into the “mystery” and “ethnodrama” approaches, Denzin talks about teaching qualitative research and touches on Rosalind Howarth’s Teaching Qualitative Research (2008) book.

Denzin lays out a set of ethical principles for qualitative researchers and discusses the publishing of qualitative texts and the politics involved in such publishing. He also suggests that qualitative research writers have to be “a better than average researcher, and a better than average writer,” recommending that they have training in creative writing.

The closing chapters present templates for the issues discussed earlier in the book and a presentation of Denzin’s utopian dream that “one day social justice will be realized.” I’m not sure that brand marketing directors will take too kindly to seeing the report of their recent research written in the form of a one-act play as suggested by Denzin.

This book is targeted to those involved in the social science side of qualitative research and will be of interest to those with a strong sociology interest. For those with less of an academic focus in our field, this is probably a book worth passing over.
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