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Revisiting Maslow: What Models Can We Use to Understand and Explain Consumption Behavior?

Maslow’s hierarchy of needs has aged better than most theories about human behavior. More than 50 years later, though, it offers relatively little explanatory power to underpin our work in unraveling what drives human consumption. Psychologists, researchers and academics already have new models. Which one may be the next iconic theory?

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Las Vegas, the location of the 2011 QRCA Annual Conference, delights and dazzles visitors with an array of activities — outstanding theater, outdoor adventures, year-round golfing, world-class shopping, extraordinary dining and more.

Misconceptions & Truths about Conducting Qualitative in Turkey

One of the most gracious, most accommodating and fastest-growing markets in the world, Turkey has the 17th-largest economy on earth. As an emerging sector in this country, market research will go more smoothly with these helpful tips.

Listening to Nonverbal Cues When Conducting Online Qualitative Research

Nonverbal communication online? For the experienced researcher, the clues and tools are there, if you know how to “listen” to them.

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Take the pressure off yourself by using these practical ideas to create powerful debriefs with your research team.

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This approach to writing consumer screeners will increase your likelihood of getting appropriate respondents in time and within budget.

3 New Reviews

QRCA members give in-depth reviews of three new books for QRCs: Delivering and Measuring Customer Service, The Art of Convening: Authentic Engagements in Meetings, Gatherings and Conversations and Sun Tzu For Success — How to Use the Art of War to Master Challenges and Accomplish the Important Goals in Your Life.

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QRCA members interview some of the top names in the industry, sharing tips and insights to help QRCs in their businesses.

3 New Reviews

QRCA members give in-depth reviews of three new books for QRCs: Delivering and Measuring Customer Service, The Art of Convening: Authentic Engagements in Meetings, Gatherings and Conversations and Sun Tzu For Success — How to Use the Art of War to Master Challenges and Accomplish the Important Goals in Your Life.

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Do any of these scenarios sound familiar? Since you graduated from school, have you ever stayed up all night to write a report that was due the next morning? Do you have more than 10 different sizes and colors of Post-it notes in your briefcase? Have you ever had to explain the difference between the objectives of the research and the purpose of the study? What about spending seven hours in an airline economy seat, battling for the arm rest so your fingers would match the proper keys on your laptop? Well, then, you are one of us — the few, the proud, the soldiers of the market research industry — and you will really like this issue of QRCA VIEWS!

Our cover story for this issue, “Revisiting Maslow” by Susan Abbott, will challenge you to think beyond the limits of “wants vs. needs” of the consumer, as Susan outlines a variety of theories of human behavior and purchase decision-making. After reading this article, I was left feeling humbled and inspired. I feel a new challenge to educate myself more on how to apply Max-Neef’s meanings model to how I approach my work and research conclusions.

If you find organizing data and beginning a report an uphill battle, you will benefit from reading “Diagram It, Map It, Matrix It! Visualizing Data for Deeper Insights” by Cori Schauer and Brianna Sylver. As the title implies, this article offers three methods to help you visualize your raw data, organize it in a meaningful way and uncover insights that will launch you into reporting them more easily. In the excellent examples provided, you will learn how these methods can be applied to almost every phase of the research process.

One aspect of my practice that I have long struggled with is how to conduct client debriefings. Early in my career as a moderator, I was shot down by a client during a debriefing, and I still do not think I have recovered from it! I needed to learn that not all clients want to stay at the facility until 11 p.m. to converse about what they have just spent four hours listening to. I should have asked for that time at the beginning of the project and secured client buy-in to the task of debriefing the groups. Liz Van Patten’s article, “Stand and Deliver,” reminded me again of that lesson. The article will also give you practical advice on how to facilitate your client debriefings, and for me personally, it will help me overcome my fears.

Our Trends section speaks to the transformation of consumer beliefs and the upheaval taking place across the globe pertaining to how we think about spending our money. Consumer consciousness is evoking change, both locally and globally. “Sustainable Consumption: The Decline of Hyper Consumerism,” by Rachel Siqueira, presents a research case study from Brazil that has broad implications.

Elsewhere in this issue, you will find guides for usability testing, webcam focus groups, screener writing how-to’s, books to read and podcasts to learn from. And you will find more incentives to visit Las Vegas this fall, which include outstanding theater experiences, wonderful outdoor adventures, fine dining and great shopping, in addition to the Annual QRCA Conference (October 12–14, 2011).

The VIEWS team is especially proud of the variety of articles in this issue. Let me once again express my appreciation for the all-volunteer QRCA VIEWS editorial staff members who work tirelessly on this publication, while also running successful businesses of their own. The time and effort they share with this organization is rewarded when you find this issue of VIEWS in your mailbox. Please let them know you appreciate their hard work and dedication to the magazine by emailing them a note (their email addresses are at the bottom of page 6). They would also like to hear what you want to read and learn about in the magazine, so send them your ideas and requests.
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I joined QRCA 13 years ago primarily for its educational benefits. I had been working as a marketing research consultant for 12 years and wanted to continue to expand my knowledge. At that time, there were very few avenues for learning about qualitative research. I was obviously gaining knowledge through experience, but I wanted more. With the goal of finding opportunities for professional development, along with the desire to expand my knowledge and to connect with others in the same field, I found QRCA. I’m so glad I’m here!

QRCA is an amazing resource for proven techniques — as well as the latest innovations — in qualitative research. Whether you are a member or not, a vast range of resources is available through QRCA to meet your educational goals. For example:

• **Qcasts.** These are monthly QRCA-sponsored webcasts on qualitative research topics. Each hour-long presentation is given by a QRCA member or guest speaker and offers rich opportunities for learning and interaction. During the QCast, you listen to the presentation, see the slides and share comments or questions via an online interface. No worries if you miss one — they are conveniently archived on the QRCA website for later viewing.

• **Podcasts.** Like listening to your education on the go? Consider downloading QRCA VIEWS podcasts from the QRCA website. This is a great opportunity to listen to interviews with a variety of research, marketing and business professionals.

• **Attend a QRCA-sponsored event.** Each year, QRCA offers an opportunity for the research community to gather in person to learn about the latest in qualitative research. Depending on the year, you can attend the “Symposium on Excellence in Qualitative Research” (May 2011 in Chicago) or the AQR/QRCA Joint Conference (2012 in Europe). Both events have their own unique style, and each guarantees a collegial learning environment with terrific presentations on the latest in qualitative research. The QRCA website is a great resource for information on these events, but also feel free to contact me.

• **Breakthroughs.** These are just what the name implies — short, online episodes that bring to life some of the most exciting qualitative research being done in the field. Visit the QRCA website, and check out the skill and creativity of our members.

• **LinkedIn:** If you prefer an interactive discussion, one that enables you to post and respond to questions, you need to join the LinkedIn Qual Group sponsored by QRCA. You can find it by searching for QRCA on LinkedIn, under Groups.

• **Website:** The QRCA.org website is an amazing resource. Not only does it contain links to everything I have mentioned, but there are also sections specifically created to provide information “About Research,” as well as “Research Tools” and a special section built just “For Research Buyers.”

• **Qualitative research books.** There are many more books about qualitative research today than there were 13 years ago. For those who like a good read, check out Amazon.com or Paramount Books. Both offer a variety of books on qualitative research. Not surprisingly, many of the authors are QRCA members!

• **QRCA VIEWS magazine:** Last but not least, this magazine you are reading is a fantastic resource. Published quarterly, it features qualitative research ideas and tools. Subscriptions are complimentary to members of QRCA and to non-member qualified research buyers. If this is not your copy of VIEWS, please visit the QRCA website at www.qrca.org to sign up for your free subscription.

Finally, if none of these resources provide exactly the kind of information you are looking for, consider contacting one of our members. Use the “Find a Researcher” tab on the QRCA homepage (www.qrca.org), and search for someone in your region of the world or within a specific area of expertise. A QRCA member would be happy to answer your questions. This wonderful group of sharing, creative individuals is the reason why I continue to be such a proud QRCA member.
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amy: I’m an independent qualitative researcher new to online, so I like the experience and support that’s offered.


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The challenge with Maslow’s approach is evident in many areas of life today, where we see behavior that seems to contradict his model. For example, the poorest of the poor in many developing countries will sacrifice other needs to obtain items that confer status and functionality, such as cell phones.

Abraham Maslow’s hierarchy of needs model has aged better than many theories in human behavior. Maslow published his model in various forms in the late 1940s and mid 1950s, and decades later when I got my psychology degree, it was still considered state of the art. Today, though, it offers relatively little explanatory power to underpin our work in unraveling the drivers of human behavior.

The majority of our respondents live in a society where their basic needs are more than met. In fact, our research is rarely about the fundamental needs for shelter at night, dry footwear and enough food to fend off hunger. More commonly, we seek to understand relatively fine distinctions in individual reactions to flavors, imagery and messaging for items that are far removed from basic needs of their category, whether that category is snack foods or financial services.

This gap in explanatory power came home to me most forcefully when studying emerging trends in consumer behavior. The explosion in co-creation activities powered by new communication technologies led the client to ask: Is this a fad or a trend, and how will it play out in the future?

Will we always want the ability to design the pattern on our sneakers, as Zazzle and Keds offer us? Will 3D printers find a home in as many places as laser printers now occupy? And how will such behavior translate into other categories? Questions like these left me seeking other explanations.

Maslow’s Triangle — A Hierarchy of Needs

Maslow’s model is commonly depicted as a triangle (see illustration on page 14). The model posits that the needs are hierarchical in nature, such that we are focused on our basic physical needs first, and only when they are satisfied does the individual attend to higher-order needs.
Self-Actualization

Self Esteem

Belonging

Safety

Physiological

Max-Neef Matrix

Spradley's Nine Dimensions
The challenge with this approach is evident in many areas of life today, where we see behavior that seems to contradict this model. For example, the poorest of the poor in many developing countries will sacrifice other needs to obtain items that confer status and functionality, such as cell phones. As a manager in Kingston, Jamaica, told me once, “Even the man with no shoes, selling peanuts on the street, has a cell phone now.”

More importantly, from the viewpoint of the qualitative researcher’s work, in the world’s wealthiest societies, the opportunities to self-actualize are seemingly limitless. Arguing that a closed triangle is not a valid representation of Maslow in today’s society, management writer Joan Kiel has argued for an open-facing structure that would better reflect the notion that self-actualization is a process of becoming most fully oneself:

“Instead [of the closed triangle], an open, wide-faced structure is needed to better reflect that self-actualization is never ending. And with this never-ending self-actualization, individuals can engender lifelong learning, change management and boundlessness.” (Kiel)

Maslow has also been challenged on the lack of scientific evidence for his model, among other things, but the concept of self-actualization endures.

**Manfred Max-Neef’s Human-Scale Development Model**

Manfred Max-Neef is a Chilean economist whose extensive work on developing societies led to his receiving a Right Livelihood Award, sometimes referred to as the “alternative Nobel Prize.” Max-Neef’s work with developing societies convinced him that conventional economic measures did not adequately determine the real quality of life in the societies he studied. A family that makes everything they need for themselves, for example, may be very well off, but their production is not recognized in any system of national accounts.

“Human needs must be understood as a system: that is, all human needs are interrelated and interactive. With the sole exception of the need of subsistence, that is, to remain alive, no hierarchies exist within the system. On the contrary, simultaneities, complementarities and trade-offs are characteristics of the process of needs satisfaction. As the literature in this area demonstrates, human needs can be satisfied according to many criteria.” (Max-Neef)

Max-Neef’s model is not hierarchical at all — it is a matrix model.
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According to axiological categories (axiology is the collective term for the philosophical study of aesthetics, such as beauty and harmony, and ethics, or the right and the good), there are nine needs: Subsistence, Protection, Affection, Understanding, Participation, Idleness, Creation, Identity and Freedom. And there are four needs according to existential states: Being, Having, Doing and Interacting.

At the intersection of these dimensions are clusters of needs that offer a rich description of human motivations and satisfactions.

**The Max-Neef Matrix of Needs and Satisfiers**

Max-Neef offers both explanatory power and some strategic guidance. For example, at the intersection of Affection and Doing, we have: make love, caress, express emotions, share, take care of, cultivate and appreciate. At the intersection of Identity and Being, we have: sense of belonging, consistency, differentiation, self-esteem and assertiveness.

Max-Neef immediately caught my interest because this model offered an answer to my “fad or trend” question.

The new tools that enable new forms of creation — such as personalized sneakers — are an expression of individual and collective creation. While customized Keds may or may not endure, the ability to create something individual is likely to become more and more important in people's lives. Although Max-Neef's model is intended to look at societal well-being more than individual motivation, it still offers considerable value in the context of individual behavior.

This model also offers organizations that want to create a richer customer

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### Max-Neef Matrix of Needs and Satisfiers

*From Manfred A. Max-Neef, Human Scale Development: Conception, Application and Further Reflections.*

<table>
<thead>
<tr>
<th>Fundamental Human Needs</th>
<th>Being (qualities)</th>
<th>Having (things)</th>
<th>Doing (actions)</th>
<th>Interacting (settings)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subsistence</td>
<td>Physical health, mental health, equilibrium, sense of humor, adaptability</td>
<td>Food, shelter, work</td>
<td>Feed, procreate, rest, work</td>
<td>Living environment, social setting</td>
</tr>
<tr>
<td>Protection</td>
<td>Care, adaptability, autonomy, equilibrium, solidarity</td>
<td>Insurance systems, savings, social security, health systems, rights, family, work</td>
<td>Cooperate, prevent, plan, take care of, cure, help</td>
<td>Living space, social environment, dwelling</td>
</tr>
<tr>
<td>Affection</td>
<td>Self-esteem, solidarity, respect, tolerance, generosity, receptiveness, passion, determination, sensuality, sense of humor</td>
<td>Friendships, family, partnerships, relationships with nature</td>
<td>Make love, caress, express emotions, share, take care of, cultivate, appreciate</td>
<td>Privacy, intimacy, home, space of togetherness</td>
</tr>
<tr>
<td>Understanding</td>
<td>Critical conscience, receptiveness, curiosity, astonishment, discipline, intuition, rationality</td>
<td>Literature, teachers, method, educational policies, communication policies</td>
<td>Investigate, study, experiment, educate, analyze, meditate</td>
<td>Settings of formative interaction, schools, universities, academies, groups, communities, family</td>
</tr>
<tr>
<td>Participation</td>
<td>Adaptability, receptiveness, solidarity, determination, dedication, respect, passion, sense of humor</td>
<td>Rights, responsibilities, duties, privileges, work</td>
<td>Become affiliated, cooperate, propose, share, dissent, interact, agree on, express opinions</td>
<td>Settings of participative interaction, parties, associations, churches, communities, neighborhoods, family</td>
</tr>
<tr>
<td>Leisure (idleness)</td>
<td>Curiosity, receptiveness, imagination, recklessness, sense of humor, tranquility, sensuality</td>
<td>Games, spectacles, clubs, parties, peace of mind</td>
<td>Daydream, brood, dream, recall old times, give way to fantasies, remember, relax, have fun, play</td>
<td>Privacy, intimacy, spaces of closeness, free time, surroundings, landscapes</td>
</tr>
<tr>
<td>Creation</td>
<td>Passion, determination, intuition, imagination, boldness, rationality, autonomy</td>
<td>Abilities, skills, method, work</td>
<td>Work, invent, build, design, compose, interpret</td>
<td>Productive and feedback settings, workshops, cultural groups, audiences, spaces for expression, temporal freedom</td>
</tr>
<tr>
<td>Identity</td>
<td>Sense of belonging, consistency, differentiation, self-esteem, assertiveness</td>
<td>Symbols, language, religion, habits, customs, reference groups, sexuality, values, norms, historical memory, work</td>
<td>Commit oneself, integrate oneself, confront, decide on, get to know oneself, recognize oneself, actualize oneself, grow</td>
<td>Social rhythms, everyday settings, settings which one belongs to, maturation stages</td>
</tr>
<tr>
<td>Freedom</td>
<td>Autonomy, self-esteem, determination, passion, assertiveness, open-mindedness, boldness, rebelliousness, tolerance</td>
<td>Equal rights</td>
<td>Dissent, choose, be different from, run risks, develop awareness, commit oneself, disobey</td>
<td>Temporal / spatial plasticity</td>
</tr>
</tbody>
</table>
experience a potential roadmap for action: find ways of occupying more of the intersections in this model, and you should have a more compelling experience. For instance, when banks offered the ability to make transactions on the internet as well as in a branch office, they occupied the intersection of Freedom + Interacting: temporal/spatial plasticity. As another example, the emergence of coffee culture offered consumers something at the intersection of Identity + Interacting: social rhythms, everyday settings, settings that one belongs to and maturation stages.

Unfortunately, the Max-Neef Human-Scale Development model does not help us understand other problems of behavior, such as why a multi-shelf display of toothpaste choices is so overwhelming, why people make irrational investment decisions and why happy endings are so influential on our memories of events. This kind of problem is gradually yielding to the work of yet another branch of psychology and economics — behavioral economics.

Behavioral Economics and Human Hard-wiring

The work of psychologists Daniel Kahneman and Amos Tversky launched the field of behavioral economics and earned them a Nobel Prize. Daniel Ariely is now among the leading lights in the field, and multiple publications in this topic area are now accessible to the general reader. This body of work is compelling because it has so much foundation in scientific method and actual experimentation as the basis of theory development.

In many respects, this branch of learning rests on the assumption that, over eons of time, the human animal has developed perceptual and decision-making tendencies that are largely biological in nature. Just as our eyes are “wired” to respond to color and movement, we are also predisposed to predictable and recurring patterns in other areas involving perception and decision-making.

There are many principles, and more arriving all the time, but a few have proven useful in my work, and perhaps will be in yours.

For example, the Peak-End Rule says that our overall evaluation of an
experience remembered will be greatly affected by the peak and the end. It is almost as if we construct a weighted average of the ups and downs of experience, but we give more weight to the last part. Children’s dentists seem to have always known this principle, as they ensure that their small patients leave with a toy, giving them a happy memory of their trip to the dentist.

There is evidence that we are generally much more sensitive to losses than we are to gains. Successive losses feel just as bad as the first loss, but we habituate quickly to improvements in our situation. Overall, this tends to make us loss averse.

Our loss aversion makes us disinclined to try new things when there is a cost, reinforcing the practice of offering free samples. When a service organization needs to make things right after errors or problems, they often need to over-compensate to put things back to even.

When gains are unlikely, loss aversion is not the rule — then, humans are often risk seekers, a phenomenon that has supported the lottery-ticket industry. The eponymous Lottery Ticket Effect says that people often prefer a small probability of winning a large prize to better odds on a small prize.

James Spradley’s structure is helpful for the problem of far-too-much data, which is often an issue when we explore a topic in depth and which is becoming a more common challenge with the growth of new qualitative technologies and hybrid methodologies.

By our choices, consumer, spiritual, political, shall you know us. It is the way we find, fashion, express and constantly tune selfhood. A good deal of our ideology of selfhood is tied up in the possession of preference and the exercise of choice.” (Grant McCracken)

Much of what we study in our work is related to our consumer culture, so the tools of cultural analysis often offer a quite useful framework. Multiple frameworks and models are available (some with catchy acronyms), but the observational model developed by anthropologist James Spradley seems to offer the most potential for broad application to our work.

Spradley defines nine dimensions for observation (below).

Spradley’s Nine Dimensions of Observation

<table>
<thead>
<tr>
<th>SPACE</th>
<th>the physical place, layout of the setting, rooms, outdoor spaces, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTORS</td>
<td>the people involved</td>
</tr>
<tr>
<td>ACTIVITIES</td>
<td>the various activities of the people involved</td>
</tr>
<tr>
<td>OBJECTS</td>
<td>physical elements present or involved in actions</td>
</tr>
<tr>
<td>ACTS</td>
<td>single actions of the people</td>
</tr>
<tr>
<td>EVENTS</td>
<td>a set of related activities; particular occasions (e.g., a purchase interaction)</td>
</tr>
<tr>
<td>TIME</td>
<td>the sequence of events over time</td>
</tr>
<tr>
<td>GOALS</td>
<td>what actors are trying to accomplish</td>
</tr>
<tr>
<td>FEELINGS</td>
<td>emotions felt and expressed in particular contexts</td>
</tr>
</tbody>
</table>

Spradley suggests taking a grand tour through these dimensions first, and then looking at a matrix of each element against each other element to create a Descriptive Question Matrix with 81 questions. For example, Activities x Goals generates the question: what activities are goal-seeking or linked to goals? The question for Events x Time is to ask how events fall into time periods.

We would not often have time to exhaust the possibilities of such a framework, but there are still benefits to the approach, even on a stripped-down basis. The nine dimensions provide a way to structure observational data, and the framework also provides clues for seeking insights when insights are not readily forthcoming.

Spradley’s Descriptive Matrix: Structure Ways of Observing Behavior

In most of the world’s industrial societies today, we are part of a consumer culture. Our choices and consumption patterns are what create our identities:

“Because making choices is the way you are inducted into our culture, and it is a good deal of what you do as a member of this culture (assuming you have the good fortune of a disposable income).
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The structure is helpful for the problem of far-too-much data, which is often an issue when we explore a topic in depth and which is becoming a more common challenge with the growth of new qualitative technologies and hybrid methodologies.

There are other times where we may despair of being able to find a new insight that will speak to the research challenge. This model provides a systematic method of seeking, which can be very helpful when the territory seems to have been well tilled in prior projects. I can recall one such project involving life insurance where continued digging suddenly revealed that the women in the project sequenced some life events differently than the men. That one small insight opened an opportunity for the client.

This model also offers a rich framework to bring to the emerging area of analysis of social media. The qualitative researcher’s contribution to this pursuit is likely to be this kind of structured observation that goes beyond simple positive and negative sentiment and, instead, starts to seek other revealing patterns.

Conclusion: There Is No Single Truth Here

The frameworks discussed here are by no means exhaustive.

For instance, archetypes offer another useful approach to understanding how whole packages of cultural meaning cluster together; they can provide a kind of shorthand to understanding and communicating around many well-established human patterns.

Functionally oriented frameworks also have their place, such as the one proposed by Clayton Christenson that consumers “hire” products and services to do “jobs” for them.

“The structure of a market, seen from the customers’ point of view, is very simple: They just need to get things done... When people find themselves needing to get a job done, they essentially hire products to do that job for them.” (Christenson)

In all areas of marketing research, there are fewer and fewer solid anchors in a sea of change. Some of the changes we are responding to are in our own tools, but many more are external and are coming from consumers themselves.

Our challenge then is not to find the one right way to examine data or seek explanations, but to strive to account for a broader array of behavior. We can use tools like these during our research design, to ensure we are exploring all the relevant dimensions. And we can use tools like these to help us structure our data and, sometimes, to explain what we find.

The more that researchers are able to link our work to the work of leading academic thinkers, the more value we can potentially bring to the whole insight-gathering process. Research buyers need this value today, as they struggle to keep up with the pace of change and strive for competitive advantage in merciless markets.

References


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SUSTAINABLE CONSUMPTION:
The Decline of Hyper Consumerism

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Worldwide awareness of the negative impact of the current consumption model — hyper consumerism — is increasing, especially in relation to social inequality and environmental damage. Consumers, now more critical and engaged, are becoming more interested in conscious consumption that balances personal satisfaction and sustainability, valuing ecologically correct, socially just and economically viable alternatives.

Initiatives and actions, both at the individual and the institutional levels, encourage recycling and reusing, which represent a simpler, more authentic lifestyle, with less accumulated “stuff” and more awareness of what you have and what you buy. At the same time, there is increasing appreciation of the idea of thrift stores, alternative commerce, handmade items and “doing it yourself,” especially among younger targets.

Understanding the Trend
The international media has given great emphasis to issues associated with sustainability, ecology, the environment, consumerism, anti-consumerism and social responsibility. Other strong trends in sustainability include a general appreciation of minimalism — where “less is more” — and conscious food habits, whether through choosing organic products or expecting and demanding fair trade practices.

To what extent has society in developing countries, such as Brazil, incorporated such politically correct attitudes? How do sustainability and consumption relate to each other in real-life practice?

A greater emphasis on such politically correct attitudes is also the case in developing countries such as Brazil. For instance, in Veja magazine, Brazil’s leading weekly news publication, the theme of sustainability was featured with considerable emphasis in the end-of-the-year specials for both 2009 and 2010. (A 2009 article covered “10 Ideas and Postures for a New World,” with concrete examples, mostly in the corporate sector for consumer goods, and in 2010, the magazine featured a special section on the topic.)

The Perceptions of Consumption
While this may seem like a modern trend, discussion regarding sustainability and consumption has been around for at least 40 years. The watershed moment of international recognition for these themes was during the United Nations Conference on the Human Environment in Stockholm, Sweden, in June 1972.

While the focus in the 1970s was on industry’s polluting effects, today we see increasing emphasis on the role of consumption on environmental damage.
What seems to have changed since then, though, is the perception of consumption, which the mass media now portray as the big villain, the cause of the environment’s disastrous situation. While the focus in the 1970s was on industry’s polluting effects, today we see increasing emphasis on the role of consumption on environmental damage.

In the book *Eco-Standards, Product Labeling and Green Consumerism*, Magnus Bostrom and Mikael Klintman point out that the mentality today is that of a “risk society,” in which common people are bombarded by news that generate fear of everything — food contamination, deforestation, climate change, genetically modified products, etc. The authors call attention to people’s cynicism and lack of faith in institutions and authorities. This is further supported by the observation that many people are compelled to take individual action or engage in environmental campaigns and conscious consumption, and they are often willing to pay more for “sustainable” products.
Looking for Answers…

To address these questions, we made deliberate choices in our recent study in terms of the consumer sample and theme while planning our data collection and establishing the project’s scope.

We focused on a certain segment of consumers — cultured and conscious, more critical and well informed (i.e., trendsetting consumers) for the primary data. These consumers have both the power to influence mainstream consumers and the ability to tackle the complexity of this debate. We also chose to focus on the themes of consumerism versus anti-consumerism (without completely ignoring the considerable growth of the luxury market) and, on the other extreme, recent access by Brazil’s lower social classes to a wide variety of consumer goods, which has propelled unprecedented development of the low-income segment.

This work utilized a “bricolage” methodology, or triangulation of qualitative techniques. Our collection of data included:

- In-depth interviews with opinion makers and experts (six interviews — two social scientists, one corporate executive, one ecologist, one non-governmental organization director and one magazine writer who specialized in ecology and conscious consumption)
- Online bulletin board and ethnographic approach
- A total of 50 consumers of high education level and different professional specializations
- Men and women aged 23-62 years
- Most resided in different regions of Brazil and some abroad (U.S. and Europe), to include a more international perception of the theme.
- Extensive collection of secondary data, including desk research, bibliographic research and reviews of Brazilian and international media (newspapers, magazines, web)

Sustainability in Brazil

In this study, the consumer data we collected among Brazil’s trendsetters is aligned with international sentiments and can serve as a barometer for greater insights about sustainability in a modern society.

First and foremost, where sustainability is concerned, there seems to be general distrust of institutions, companies and the government. Moreover, Brazilians are expressing cynicism towards “advertising” and “marketing” in the broader sense, where both are regarded as manipulative tactics used by companies and corporations to shape public opinion.

There is also a sense of fragility when it comes to personal relationships and “what really matters.” This perception appears as a constant background to the central discussion and seems to characterize an authentic crisis of values. This attitudinal pattern manifests as a tendency to oscillate between the rationalism that this intellectual condition allows and the desires and needs of people in a consumer society.

This conflict was clearly expressed by our respondents, who tended to overemphasize the generic concept of “sustainability,” while demonizing consumption and blaming themselves for exaggerated consumerism. Generalizations were frequent, as there was confusion between subjects and concepts. Broad themes — such as consumption, sustainability, ecology, “doing good,” social justice, responsibility, consciousness, health, well-being, global warming and spirituality — were virtually interchangeable and part of the same overall discourse.

The following rationale seemed to be attached to these ideas, repeated by many respondents, with little variation:

1. Exaggerated consumption or out-of-control consumerism leads to environmental unbalance.
2. A model that emphasizes consumption, money, status and the idea that “you are what you have” or “you are what you consume” is causing the planet to suffer, and all of us (including our children) will pay the price for this.
3. The planet’s answer will be further destruction, environmental catastrophes, floods, etc. The problems are overwhelming, and everyone feels helpless in the face of the current situation.

It is important to realize that there is a constant in this line of thought — i.e., an established cause-consequence relationship between consumerism and the Earth’s environmental problems in general.

FROM CONSUMPTION TO DISASTER

CONSUMER SOCIETY: model that prioritizes money, status and power

Out-of-control consumerism leads to environmental unbalance

The planet’s response is catastrophes, and we all suffer.

Overwhelming problems: impotency

SOLUTION: individual actions of consumption restriction
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(Minneapolis)
Delve
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Fieldwork Minneapolis
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Delve
(Kansas City)
Delve
(St. Louis)
Hatch Research
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New Jersey/New
York (Metro Area)
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Fieldwork West
(Fort Lee, NJ)
Fieldwork Phoenix
(Thaneck, NJ)
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Consumer Vision (Toronto)
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At the same time, the respondents attributed great importance to personal responsibility. All respondents tended to believe that there is a light at the end of the tunnel, and this light resides in individual action and consciousness (i.e., each person doing his or her part). They understood that “their part” meant small actions, such as recycling garbage, buying less, eating organic food, etc. In this context, companies and institutions invariably appeared as negative agents, and public or corporate campaigns promoting sustainability or social responsibility were only very rarely mentioned spontaneously.

When pondering potential solutions, respondents tended to become philosophical and suggested a need to recover “true human values” and “faith” in people and spirituality. Some also suggested that strict laws, regulations and standards must be established, with severe punishment to those (people or institutions) who break the rules.

Product consumption, however, was not all about “guilt.” When thinking about consumption, our respondents admitted that it is necessary to consume (there is a basic/actual need for it) and that what is consumed may satisfy pleasurable desires and dreams. In practice, the respondents tried to combine both ideas, looking for the pleasure and joy in the consumption of necessary/“compulsory” goods.

“The good side of consumption is being able to satisfy a need, to feel the satisfaction of owning something that will last.”

“It’s about being able to satisfy your desires, to pleasure the soul...”

Product consumption, for them, was something unavoidable. Not only a way to express themselves, consumption also represented power towards others and towards themselves. Additionally, our respondents highlighted the satisfaction contained in consuming — the simple pleasure in the act itself and the ability to buy and experience things. The social/group side of consumption was also important because consumption was seen as an instrument for social insertion: identification with the larger group and with what is “in” (fashion). To consume also appeared as an incentive, a motivation to work/earn money/produce.

The negative side of consumption was, for respondents, clearly centered around excess — loss of control — which generates waste, debt, anxiety and frustration at having no time to enjoy what was bought/acquired.

“Too tired and without time for so much music, so many movies, so much TV, so much food...”

Also considered negative was the idea of mandatory, compulsory or imposed consumption (whether for an actual need or from media pressure), which they believed “pushes” consumption by characterizing it as a way to position oneself in a group. Our respondents pondered that consumption exposes injustice and social and financial differences, as it excludes those who are unable to consume. The “illusory” face of consumption appeared in this context: consuming to be happy, yet being unable to find happiness in it.

During the study, respondents were asked to associate a set of pictures with the project’s major themes of myself, the future, consumption, consumerism and sustainability. Something that stands out in respondents’ images sent was the widespread presence of brands, logos and marketing icons. Importantly, there were no references to companies, brands or products in the associations with a positive scenario.

On the contrary, these images established the tone of the respondents’ negative projections. Based on this exercise, if the question “Which side are the brands on?” is considered, it is clear that they are in the negative side of the story, despite all marketing investments made by companies attempting to associate themselves with the positive concept of sustainability.

What Can Brands Do?
One of the basic assumptions is that sustainability should not be treated as a
possible way for brands and companies to improve their standing with consumers. It is, in fact, the only way. It is not an option. It is not a trend. It is reality. Ethical and green principles must become a part of a brand’s baseline and a part of its DNA.

The issue is not whether or not to be sustainable, but how to integrate the concept into the company’s mission and procedures, and how to communicate it to consumers in an effective way.

How to make the company sustainable in its essence is the hardest part and involves issues outside of the scope of this study. To go beyond “greenwash” and empty discourses of sustainability is a complex task that must involve the corporation as a whole. This is an in-depth paradigm shift, something structural that takes time and demands the combined efforts of all of the company’s departments.

Moreover, it is not possible to trace (at this point and based on this study alone) specific directives or norms of how companies should communicate sustainability. It is possible, however, to build an understanding of how consumers relate to the theme and to then raise possibilities for company and brand actions within this scenario.

This research indicates there is considerable burnout when sustainability is concerned. Consumers feel paralyzed and resentful of the preaching tone and “moral lessons” surrounding the theme, resulting in a somewhat “empty” discussion.

It is not uncommon for communication campaigns dealing with sustainability to take on a dramatic or accusing tone. Although the impact of this approach is undeniable, its effectiveness must be questioned. To position oneself on the side of the problem, surrounding itself with negativity, is not an effective way to emotionally connect with consumers.

**One Possible Approach**

According to a paper written by Anthony Kleanthous and Jules Peck for the NGO World Wildlife Fund (“Let Them Eat Cake,” 2006), one of the ways to deal with the issue is to increase the understanding of the interaction between what they call Brandscape, Brainscape and Behavior.

- **Brandscape** can be understood as the wider scenario of the brands and everything associated with them (positioning, communications, logos, actions). It is, in fact, what we can call “the market.” It is like a map of brands and services, including everything involved in this process: sales, pricing, production, marketing, competition, promotional actions, etc.
**Brainscape** is the mindset of the people — attitudes, values and beliefs that permeate consumers’ choices and lifestyles. The Brainscape affects and is affected by the Brandscape: individuals’ demands lead to innovation, which leads to new modes of consumption, new products and new possibilities.

**Behavior** is what people actually do and how they effectively act in the world. This is influenced by the relationship between Brandscape and Brainscape — that is, between the macro scenario of the brands/services and the beliefs, values and attitudes of individuals and of society as a whole.

This dynamic became clear in the interviews and throughout the fieldwork conducted for this study. There is a macro scenario with great movement promoted by governments, non-governmental organizations, corporations and their brands in order to impose the discourse of sustainability. At the same time, individual movements point to the same direction: respondents were highly involved with the theme and the discussion (which is made clear by the recurrence of the “anti-consumerism” discourse), which demonstrates the relevance and urgency of this topic in their lives today.

With this, we see extremely fertile ground for change. A number of factors indicate that the combination between Brainscape (the general attitude of the individuals) and Brandscape (the macro scenario of the brands) can effectively lead to actual behavioral change.

Behavioral change is not yet widespread (not all consumers pay more for green products; not all recycle; and not all are actually mobilized by the theme). There is, however, a very important transformation in terms of attitude: What used to be considered acceptable is condemned today. What is the survival period now, for instance, of large vehicles with poor gas mileage (such as SUVs), frequent plane trips, long showers and even flushing too often? (There is even an award-winning campaign in Brazil for people to start “peeing in the shower,” aired by a number of channels, including some geared at children, such as Cartoon Network!) It would be naïve to assume that people will continue to consume in the same way that they do today.

**The Changing Consumer Mindset**

It is important to keep in mind that mindset and attitude may not reflect people’s behavior in the short term, but these latent wishes and desires emerge when the right opportunities arise. This mindset speaks to how people want to feel, how they want to perceive themselves and how they want other people to perceive them. It is about self-image and projected image. Buying “politically correct,” ethical, green or sustainable products is a way to feel good about yourself and project a more positive image of yourself to the world.

Above all else, the current moment is one of increased consciousness. People are starting to realize that they are part of the larger process. They are beginning to pay attention to the amount of trash they produce, how much they consume, how much they spend and how much they waste. They are starting to effectively feel as part of the entire “negative” cycle of consumption.

**Changes Are Unavoidable**

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--- | --- | --- | --- | --- | --- | ---
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And this is the main point: consumption is being perceived as the villain of this entire scenario. Marketing and “propaganda” are blamed for “out-of-control consumption” (to use two expressions that reoccurred among our respondents), for excess, for the search for extreme satisfaction through consumption, for the accumulation of unnecessary goods. To consume is almost a capital sin: something that is nice, seductive and hard to resist, but that does not lead to eternal bliss, much less to salvation.

Therefore, it is crucial to rethink the role of consumption in people’s lives. In fact, many people are already doing this — consuming less, recycling in different levels and choosing alternative modes of consumption. The questions remain: how can brands position themselves on the “good” side, and how can they propagate the culture of conscious (and toned-down) consumption without shooting themselves in the foot?

We see great movement on brands’ part to connect with such consumer mood, albeit unsuccessfully so far. One of the possible mistakes concerns focus. Most of the communication studied in this project dealt with major situations: they said a lot about the need to act in emergency situations, the environment (e.g., global warming, reforestation, development of renewable energy), yet ended up too distant from people’s actual lives. By addressing these major issues, they sounded repetitive (“Sounds like they all say the same thing,” respondents said) and suggested a rather empty rhetoric. They lost relevance and did not bring about effective change that either affected consumers’ lives or added brand value.

Another problem is the tonality that is typically employed. It is common for publications and major campaigns (by the government, companies and brands) to emphasize restriction and guilt. Those advocating light water use or water rationing, for instance, almost always adopt a “preaching” stance. Editorials and articles are almost always framed as a “wake up call,” something like: “We need to do something! Wake up and quit your alienated life!”

There is no doubt that this approach generates frustration. But it also creates bad about themselves and the future. The enormity of the problems becomes paralyzing. Our respondents were often overwhelmed by the task at hand and disappointed by the actual opportunities for change.

In addition, this type of “police” approach fails to establish an emotional connection with consumers. On the contrary, it leads to a connection based on rationality, duty and obligation — all of which have little to do with the universe of desire, fantasy and experimentation promoted by consumption.

With this scenario in mind, companies and brands that are able to differentiate themselves and surpass these barriers will stand out. They will be those who are able to go beyond the dramatic, preachy tone, helping consumers cope with this new world order and making them feel connected, conscious and, especially, free of guilt.

From a constructive perspective, therefore, companies and brands should:

- Help consumers feel better about themselves and their attitudes.
- Change the tone: no guilt, no preaching, no restrictions. They should position themselves as an agent of change for the better.
- Propose friendly solutions that make people’s lives simpler, as opposed to more complicated.
- Make consumers feel that they are gaining something, as opposed to performing more tasks (paying more for local products, washing packaging for recycling, carrying batteries in their purse for the recycling center, carrying trash in the car trunk, looking for recycling facilities, etc.).
- Make people’s lives easier by creating mechanisms that make “living ethically” something possible and valued. One example is the action of organizations such as the Salvation Army, which, through a massive campaign, was able to change the perceptions of donations in Brazil by effectively enabling the reuse of consumer goods.
- Help people live in a more sustainable manner, by offering information as well as services and possibilities to act.

**BRANDS CAN...**

- Position themselves as positive agents of change
- Change the tone — no guilt, preaching, restrictions
- Help consumers feel better about their attitudes
- Provide friendly solutions that make life easier
- Make it possible to live in an ethical way: offer products and services that have this basic mission incorporated into its positioning, its DNA
- Total transparency: provide information to consumers

**Final Thoughts**

In short, it seems to be more important to “walk the walk” than to “talk the talk.” Companies/brands must communicate concrete results, before they publicize their noble intentions. They must maintain sustainability in their DNA and in the entire product mix: in the packaging, the ingredients, the way communication is produced and the message itself.

With hyper consumerism at a decline, it is vital to assume that sustainability should be part of the business and not its entire image. It is not philanthropy and should exist in both the macro and micro spheres. Most importantly, sustainability should truly bring relevance to the business in a way that makes sense to consumers.
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Qualitative researchers are known for their bag of tricks — tricks to get people talking, to pull out juicy information in an interview and to get to the not-so-obvious insights that help clients redefine their markets. Adding to your bag of tricks, this article is a practical guide on using design methods to visualize your data, which will help you pull more meaning out of your data, tell more compelling stories and provide deeper insights to your clients.

**Visualizing Data**

Visualizing data is much more than creating snazzy graphics for your final presentation. It is about using graphic-design methods to help you better identify and understand the compelling stories in your data. These methods enable you to organize your data in different ways so that you see insights you might not have uncovered when reviewing transcripts or field notes alone. It is also a great way to communicate complex activities and/or relationships. As an added bonus, resulting artifacts can become powerful and long-lasting communication tools for you and your client.

There are many visualization methods you can use to slice and dice your data. However, we will focus on three of the most powerful — affinity diagrams, process maps and 2x2 matrices. For each, we will define the method, tell you how to do it and when to use it, with examples of each from past client projects. And, have no fear! None of these visualization methods requires you to be a trained designer to use them expertly and effectively.

**The Affinity Diagram**

Affinity diagrams are among the easiest visualization methods. At its core, an affinity diagram is about organizing your data into common groups. This enables you to turn large quantities of data into smaller chunks of information that you can use to slice and dice your data. However, we will focus on three of the most powerful — affinity diagrams, process maps and 2x2 matrices. For each, we will define the method, tell you how to do it and when to use it, with examples of each from past client projects. And, have no fear! None of these visualization methods requires you to be a trained designer to use them expertly and effectively.

We have yet to find a project in which affinity diagrams seem inappropriate or fail to add the value expected of them.
How to Do It

1. Gather your data into separate chunks. You want one idea per Post-it® note, index card or piece of paper. It is not important that it is pretty or necessarily even readable from afar. It should, however, be moveable, since you need the flexibility to include an idea initially in one group and then possibly change your mind and put it in a different group later.

2. Cluster similar things together.

3. Name each group.

4. Analyze within and between your groups: Ask yourself these questions: Why is this a group? What do the separate pieces of information within this group tell me about this theme/trend/topic? How does this group relate to the others created? What are the hottest issues/biggest themes emerging from my study? What smaller trends have emerged, trends that might require further research to really understand them?

When to Use It

Affinity diagrams can be used at any time in the research process. We have used them during research planning to help create recruiting screeners and interview guides. Most of the time, they are used in interim analysis sessions and as a kick-off to the analysis phase because it is one of the easiest ways to sort the data and begin to make sense of what you have.

We have used this method successfully across industries and functional roles within organizations. We have yet to find a project in which affinity diagrams seem inappropriate or fail to add the value expected of them.

What Does It Look Like in Real Life?

In this example, the research team is leading the client team through two rounds of affinity diagramming. In Photo 1, the teams are sorting data into chunks and labeling groups. Photo 2 shows the results of further refinement of the groups. The revised data tell a cohesive story about the high-level findings, as well as the beginnings of recommendations for the client team.
The Process Map
A process map is exactly what it sounds like — the step-by-step process that an entity (an object, a person, a system, etc.) must go through to accomplish a task. Anything can be process-mapped: how you make lunch for your child, how you decide where to go on vacation or how a business routes credit-card transactions from a store to the credit-card company.

Process maps help identify the different roles that people and objects have in a process, and they reveal the issues and gaps that cause business and operational problems. And, if you are doing process maps of your client’s internal work practices, they will help you build trust because the maps show your client that you understand the company.

How to Do It
1. Define the people, objects or tools on which the process map should be focused.
2. Identify your process “trigger” (i.e., what starts the task flows for your process map).
3. Make a list of the high-level tasks that are part of the process you are mapping.
4. Order the tasks according to how they are done, starting with the “trigger.” We tend to take a “Day in the life of…” approach to documenting what happens to each person, object or tool in the process.
5. Drill down into each task, noting what happens — any complications, redundancies and workarounds experienced in that task and how that task relates to others in the overall process.
6. Analyze the entire process map for opportunities. Are there ways to gain efficiencies in this process? Are there better ways to support people in their work? How can you re-engineer a product or service to better integrate into an existing process?

When to Use It
A process map is best used when you need to understand and communicate complex tasks because it focuses on identifying individual tasks and how those tasks create the entire process flow. As you focus in on the individual tasks, you are better able to identify where breakdowns or redundancies occur, as well as the specific responsibilities and accountability that people and objects have in a process.

We have found process-mapping to be most effective in projects for which a process is under review, whether directly or indirectly. In direct situations,
clients may wish to understand how they can gain more market share within a process or, if they have a presence within a process already, how they may enhance the value that they currently provide to their customer in completing their work tasks. In indirect situations, clients may wish to understand how they can better support work values, such as collaboration or customer satisfaction; hence, they need to first understand how current practices impede these values from being realized most optimally.

What Does It Look Like in Real Life?
Photo 3 shows an example of an informal process map done in the beginning phases of analysis to understand a set of complex tasks, the tools used to accomplish each task and the output of each task. With this map, we were able to understand the steps of the overall process, how the work is done and what is produced. We also labeled problem areas with pink notes so we could easily see how problems relate to the entire process.
Our second example, shown in Figure 1, is a formal process map done in the final stages of analysis, moving toward synthesis. This map follows the various products that International Space Station (ISS) planners use throughout their planning process. Even though we were interested in the people, we found if we followed the products, we were able to understand how the work was done, what tools were used and where the redundancies happened. This process map was refined throughout synthesis and was included in the deliverables to NASA. The ISS Planners still use this map today to explain their processes to new hires and new international partners on ISS.

Figure 1. This formal process map, showing the planning products used for the International Space Station, was created for NASA.
The 2x2 Matrix

A 2x2 matrix is a map of entities plotted along vertical and horizontal axes. Most commonly, matrices help visualize a market’s landscape. This landscape may be competition-driven, showing where a company plays in a market comparative to their competition, or it can be more consumer-driven, illustrating consumers’ various interpretations or behaviors related to a given topic.

A 2x2 matrix expresses relationships that entities (i.e., behaviors, companies, objects) have, relative to each other. Through mapping individual entities to the matrix, groups of “position” emerge, articulating the market’s landscape.

How to Do It

1. Make a free-form list of the various axes that might offer a meaningful way to slice and dice your data. Note: All axes must be opposing, but they can be more than high-low in orientation.

2. Review the entities (i.e., behaviors, companies, objects) to map to your matrix. Choose two axes that promise to offer good distribution of your entities across the 2x2 matrix.

3. Place your entities on the matrix (we suggest Post-it® notes for the first round, as they provide flexibility for you to explore the position of these entities within the matrix).

4. If things naturally group, name the groups by assessing the “like qualities” of the entities residing in each group.

5. If things do not naturally group, pick a different combination of axes, and return to step 2.

6. Once a map is working, analyze it for opportunity. Where can your client best play within this market landscape? What attributes must an offering have to be successful in a market territory?

When to Use It

Of the three design methods, matrices are the most difficult to master, as it often takes a few tries to find the right axes for the matrix. However, 2x2 matrices can be used in multiple phases of a project. We use competitive-driven 2x2 matrices — mostly constructed out of secondary research — to frame
The purpose of these methods is to help you see the stories your data wants to tell, and to help you understand those stories on a deeper level.

What Does It Look Like in Real Life?
In this example, you can see a summary of the accounts-payable behaviors of seven different companies. Companies highlighted in blue have purposeful approaches to payables, while companies highlighted in yellow do not. This matrix allows the client to understand how their customers (companies 1–7) approach payables so that the client knows where to focus efforts in supporting them.

Parting Comments
As you can see from our examples, visualizing your data can take many forms and can be either formal or informal. With all three methods, there are no right or wrong answers on how to implement them. We love Post-it® visualizations just as much as (if not more than) the more formal, professionally designed versions.

Just remember, the purpose of these methods is to help you see the stories your data wants to tell, and to help you understand those stories on a deeper level. This way, you can share those stories, and the insights resulting from them, with others in concise and meaningful ways.

Figure 2. This 2x2 matrix allowed the client to understand how their customers (companies 1-7) approach payables.

Clients have diverse payables strategies

The interplay between financial stability, cash position, general corporate culture and strategy, industry and “power position” within that industry, and the level of commoditization of vendors/materials leads to variability among companies’ payable strategies. Please refer to Appendix B for a description of each of the on-site research participants.
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In the world of web design, it has long been acknowledged that usability is an important factor in creating websites that are effective and desirable. But is usability enough? Will designing for good usability actually drive the achievement of business objectives?

To address these questions, let’s take a step back, and consider anew why we create websites. For the most part, we create websites to persuade people to do something — to take action. User action is what drives the bottom line on many websites, whether we are selling products or services, soliciting donations, enticing people to sign up or just about whatever else we are trying to do. And what drives user action or behavior is decision-making. The precursor to every user action is a decision. People decide before they act.

If user behavior drives the bottom line, and decision-making is the precursor to behavior, then web designers can play a critical role in driving the bottom line by creating website designs that solve for user decision-making. The qualitative researcher or usability consultant can add significant value by helping web designers understand how users decide and what affects the users’ decision-making processes. Next, the consultant can help her client leverage that understanding to create online experiences that result in win/win outcomes for both users and the client.

How Decision-Making Works

Research shows that human decision-making is characterized by a few key fundamentals:

The qualitative researcher or usability consultant can add significant value by showing web designers how people decide and what affects the decision-making process.
People’s preferences and goals are typically quite malleable.

People determine value through a process of comparing and contrasting.

A person’s goal in decision-making is to get the best possible outcome with the least amount of effort.

First, people’s preferences are not nearly as concrete as we might assume. People’s goals and preferences are actually quite malleable and, therefore, significantly influenced by the context in which decisions are made. When website users make decisions as they interact with a website, they are influenced by almost every aspect of the page layout and design, including the number of options available, the wording that is used, the ordering of the items, whether default values are provided and so on.

People are also very sensitive to the amount of “work” involved with decision-making. Their primary goal is to make a good decision with a minimal amount of effort. To accomplish this goal, people use shortcut strategies that enable them to make efficient decisions that usually result in acceptable outcomes.

Decision Architecture: Designing for Decision-Making

To design for effective user decision-making, it is necessary to understand the importance of the decision-making
context and the various elements of the context that affects decision outcomes. The process of designing for decision-making is called “decision architecture.” The goal of decision architecture is to create user decision-making experiences that result in easier decision-making and better decision outcomes that support business objectives.

How does decision architecture work? How do we incorporate it into the design process, and how do we test to ensure that the design achieves our objectives?

Criteria and Barriers
In decision architecture, it is important to consider two important questions early in the design process:

- What criteria will users primarily use to make their decisions?
- What concerns might act as barriers to making their decisions?

Recently, I helped a business team design a website that would enable users to select their own energy provider. We needed to know what would most influence people to choose one provider over another because this would set the focus for the entire design. To answer this question, we spoke with many different kinds of consumers and found that they would base their decision on one overwhelmingly important factor: savings.

Knowing this was essential because it became the linchpin for the entire design. We now knew how to attract people’s attention, pique interest and draw them in, and how to keep their attention throughout their entire online experience.

We also needed to know if there was anything that would prevent them from moving forward in selecting an energy provider. Would they have particular concerns or fears that would hold them back? To find the answer, we queried many different types of consumers and found a couple of recurring themes:

- People needed to feel confident that the provider would deliver energy reliably and that if something went wrong (e.g., the power went out), someone would be readily available to correct the problem.
- People needed to feel that the website itself, as well as the people and entities behind it, were reputable, reliable and “safe” to do business with. Essentially, people sought a relationship based on capability and trust.

Knowing people’s concerns as well as their decision criteria made it easy to focus the design and determine what was or was not essential. It is critical to know what is essential to the design because the ease of decision-making is comprised largely of people’s perception of that process. A complex design immediately suggests a complex user experience and, subsequently, complex decision-making. People are incredibly sensitive to the “work” of decision-making, and the appearance of your site will elicit an immediate gut reaction that will either be positive (e.g., “easy”) or not.

The Home Page
One of the most important aspects of a website is its home page. To be effective, the home page needs to answer, as simply as possible, three key questions that are critical to the user: who are you, what do you do, and why should I care? If your home page doesn’t answer these three questions in a simple, forthright way, it is likely that people will not spend much time at your site.

On the energy site, we targeted the design of the home page specifically to answering these three questions. For some users, choosing an energy provider would be something they had never done and were unfamiliar with. So, we needed a simple way to convey the overall concept. We did this by displaying a simple diagram to show how the process worked.

We also wanted to immediately capture attention, pique interest and draw people into the site. Since we knew that people were most interested in savings, we displayed actual savings being realized by people in each user’s own region of the country, and we provided a means for users to then drill into the site to get information that would be specific to their own needs and region. Displaying actual savings data made the information concrete, real and salient.

Simplicity: Less Is More
A primary challenge in web design is to keep the design simple. From a decision-architecture perspective, complexity is the enemy of easy user decision-making. At one point in the design process, the business team discussed what types of information and data to show users on a page where they could compare energy providers.

As I listened to the discussion, it became apparent that the comparison page was coming very close to becoming overloaded with information. So I asked the team a critical question: was it more important for the user to make the absolute right decision or to make a good-enough decision that would get them to a better place than they were today?

This question is critical because it often means the difference between convincing the user to make a decision or not. When the user becomes overloaded with information, the decision becomes too complex, and people simply cannot decide. This situation results in a loss for everyone—the user, your business partners and you. If you can make the decision seem simple and straightforward, you are more likely to get a win/win/win result.

You make the decision seem simple and straightforward by focusing the design on the criteria that are important to people as they make the decision. This is why you ask the important

People are incredibly sensitive to the “work” of decision-making, and the appearance of your site will elicit an immediate gut reaction that will either be positive (e.g., “easy”) or not.
question I posed earlier: what criteria will users primarily use to make their decision? You need this information in order to keep the design focused on the right things.

Decision Architecture and Existing Research Methods

Decision architecture is easy to integrate into existing usability-testing methods. Simply put, ask users to think aloud about how they are making a decision and whether there is anything that leads them to hesitate in making a decision.

Pay particular attention to what your users do during the usability test from a decision-making perspective. What items are they choosing? What criteria do they seem to be using? Where are they hesitating, and why?

You can also incorporate decision architecture into field studies — like contextual inquiry — by observing people in their natural habitat and talking with them about how they make decisions that relate to your website objectives.

Developing a Holistic User Profile

To more fully understand what makes your target decision-maker tick, incorporate data from web analytics, and interview salespeople and customer-service representatives in your client’s organization. This will help make the “profile” of your user audience more robust and reliable.

Human decision-making is a complex process that involves much subtlety, so it is much more delicate than testing for standard usability. Research shows that most decision-making occurs at the subconscious level. This means that people do not have the ability to explain why they decide in certain ways. When asked, they will readily supply an answer. But it may not be — and probably is not — the real reason. It is...
important for research professionals to understand this limitation about humans and decision-making.

This is why you need multiple sources of data to provide a holistic picture about how and why people actually decide. The best way to test for decision-making is to make the “lab” as realistic as possible. The most realistic lab I know of is A/B testing, since it tests real users in their real environment, and you can structure the test to isolate for a very specific aspect of the design.

**Final Thoughts**

Decision architecture and usability take a similar approach to the design process in that they both originate from a research-based perspective. Decision architects and usability consultants know enough about how people are “hard wired” that they can make educated guesses, or hypotheses, about what will and will not work from a design perspective. These hypotheses get baked into the design, and the design is then tested to see whether it accomplishes its mission.

Usability and decision architecture differ, however, in their focus. The lens of usability focuses on ease of use, a necessary requirement for good web design and good decision-making. The lens of decision architecture focuses on decision-making, the driver behind the user behavior that determines the bottom line on a website.

There was a day, not so long ago, when the art and science of website usability were something new and different. Now, usability is recognized as a requirement for good web design and for developing a competitive edge in the marketplace.

Today, the art and science of decision architecture are something new and different, but no less critical than designing for ease of use. As I peer into the bright future of web design, I am optimistic that the practice of effective decision architecture will soon become commonplace and a recognized must-have for achieving — or exceeding — business objectives on the web.
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Cutting out the planning of travel arrangements, not to mention the time required to actually travel (particularly for multi-city research projects), can drastically reduce a project’s timeline.

In the early phases of designing a research project, it sometimes becomes evident that traditional, face-to-face focus groups will be impractical. In such cases, webcam focus groups may be the solution, since they provide enhanced flexibility over traditional groups. They are particularly ideal when the researcher must shrink the project timeline, observe participants in their natural environment, exercise greater control over shared stimuli or offer flexible scheduling for low-incidence participants.

The following examples illustrate some of the situations in which webcam focus groups offer substantial advantages over in-person, face-to-face groups.

**Example 1: Shrinking the Project Timeline**

These days, it seems that everyone wants to achieve the depth of the traditional qualitative focus group but without taking the time required to plan the logistics, secure the recruit and execute the data gathering. Consider, for example, a client that would like to gather feedback about a proposed rebranding campaign for a vacation destination city. The destination city does not draw a huge nationwide audience; instead, for the most part, it draws people from surrounding states for mini-vacations. The client would like to test a variety of stimuli, including radio ads, television ads, print ads and a brand new website.

For such an advertising study, the client normally would conduct a series of focus groups in each of the surrounding states. Given the time required to travel to several surrounding cities, the travel logistics alone would take one to two weeks. In addition to the face-to-face focus groups, the client would also want to speak with travel planners and schedule teleconferences with a nationwide sample of vacationers. When conducting the teleconferences, the client would also have to determine which stimuli to use and how to get those stimuli to the participants.

**What is a webcam focus group?** For the purpose of this article, we are discussing groups that utilize the following: a shared online space for the moderator to show stimuli, webcams to allow the participants and moderator to view each other and audio-teleconference technology to converse.
Executing this project using a webcam focus group methodology would provide a number of advantages over the traditional methodologies cited above. First, it would allow the researcher to interact with the same groups of participants, while substantially shrinking the interview timeline to a mere matter of hours. Second, it would allow the researcher to gather a nationwide sample of vacationers, with a higher concentration around the destination city. Third, it would allow the researcher to easily present all of the stimuli needed for this assignment (print ads, videos, radio spots and website features).

The ability to permit all of the respondents to view the stimuli without requiring them to travel means that the researcher can complete all the necessary interviews in a single day of marathon interviewing. The researcher no longer has to worry about travel logistics, and the clients and participants do not have to travel, as they will participate and observe from their individual computers in their office (or even their home).

Cutting out the planning of travel arrangements, not to mention the time required to actually travel (particularly for multi-city research projects), can drastically reduce a project’s timeline. In addition, there are other benefits to eliminating travel, which we examine in the next situation.

Example 2: Capturing Feedback in a Natural Setting
When participants engage in a webcam focus group study, they log in from their home or office. This allows the researcher to observe how they interact with a product in a natural setting.

In a traditional focus group, however, the researcher brings participants into a facility room, typically with fluorescent lighting and a slightly “creepy” two-way mirror. She then expects the participants to provide feedback as if they were sitting in their home watching a commercial or enjoying a snack. The limitations of the face-to-face methodology are highlighted when you consider a study that focuses on a beverage, such as a sports drink. Consider the context within which a consumer typically prefers a sports drink. It might be on a hot summer day right after he has mown the lawn or finished his daily jog around the neighborhood. It is nearly impossible to replicate this type of real-life experience in the traditional focus group facility. This substantially limits the quality of the research design.

However, when executing such a project using webcam focus groups, the researcher can recruit and schedule participants in a way that ensures that just prior to the interview, the participants engage in a typical activity before drinking a sports drink. The sports drink could be shipped to the participant prior to the webcam interview, and the researcher would get the added benefit of knowing how the participant would typically store the product. During the interview, participants would drink the sports drink on camera, in their home, just as they normally would. Thus, by moving the experience to their home environment, the researcher captures the authenticity of the experience. He is able to discuss what drives their

After the researcher has set up the group and handled the logistics of sending webcams to the participants, there are few obstacles to securing those participants for a follow-up session.
Webcam focus groups are not the solution for every project, but there are times when they can help researchers achieve their goals — either by shrinking project timelines, meeting participants unobtrusively in their own space, exercising greater control in concept testing or involving difficult-to-reach populations.

Example 3: Exercising Greater Control Over Stimuli
In addition to allowing the researcher to engage participants in their natural environment, webcam focus groups also enable her to exercise greater control over the presentation of advertisements and concepts.

In a traditional focus group setting, print images typically are applied to poster board and passed around or posted on the wall. Consequently, not all the participants are able to view the image in exactly the same way or for the same duration. In the webcam focus group, the research team uploads the images, PDFs or even commercials to the meeting site. During the discussion, the researcher is able to show them to all participants in the same way for the same amount of time. The online setting makes it possible to receive feedback in the form of responses to polling questions and private messages to the moderator prior to discussion, as well as traditional group discussion.

Example 4: Securing the Participation of a Low-Incidence Population
Our final example concerns concept testing with a group of low-incidence business professionals who typically are difficult to recruit. It can be quite costly to persuade members of this population to participate in face-to-face focus groups, as they must be compensated not only for the time they spend in the interview, but also for their travel time and expenses.

Webcam focus groups allow researchers to more easily involve low-incidence participants and to engage them for longer periods of time. The researcher now is able to schedule the group at the participants' convenience (for instance, after work hours) and to show the concepts quickly and easily. Also, after the researcher has set up the initial group and handled the logistics of sending the webcams to the participants, there are few obstacles to securing those same participants for a follow-up session (for instance, participation in an additional round of testing of revised ad concepts, should that be desired).

Final Thoughts
Webcam focus groups are not the solution for every project, but there are times when they can help researchers more easily achieve their goals. Real-time, web-based groups enable researchers to craft the research project in such a way as to blend the real-time interaction and visual cues of face-to-face interaction with the flexibility of online scheduling and a wider reach of participants.
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Q1. To write an effective consumer screener, the screener must capture... (READ ALL OPTIONS)
   a. All the information you want to know about a potential respondent.
   b. Just the minimal basics.
   c. Specific, targeted information about a potential respondent.

Does this question format look familiar? This type of screening question is found on most consumer studies. The respondent must answer “correctly” in order to qualify, but nothing about this question leads the respondent to know which is a right or wrong answer. Only you and your recruiter know the answer (or answers) that will lead to terminating your potential respondent.

If your goal is to write an effective screener that results in the most appropriate respondents for your research, what is the best answer? Better yet, what makes a screener effective?

Consider, for instance, the first answer. Those of us who have been recruiting for a while have seen 20-page screeners that uncover more information about potential respondents than even their own family members know! In my opinion, however, if you find yourself asking more than two “nice to know” questions (i.e., questions that are not used to weed out inappropriate respondents), then you are not using your time with a potential respondent efficiently, and you run the risk of losing respondents from “question fatigue.”

As for the second answer, if the respondent qualifies on the most basic questions in the screener, he or she will be qualified for the research, and any additional information can be discovered during the research itself. However, by making an extra effort to design questions that capture nuances to differentiate someone who is “probably a fit” from someone else who represents your ideal respondent, you increase the likelihood of generating actionable insights.

Thus, the third choice — designing questions that capture specific, targeted information that best defines who you want to interview — is our winning answer.

For Whom Is the Screener Written?
Two people are involved in a screening process: a recruiter and a potential respondent. Your role is to design the
If you are looking for respondents who meet narrow demographic specifications (such as those with household incomes above $250,000), then ask your demographic questions up front. If not, save them for the end.

The recruiter and your potential respondents may not understand industry lingo, and they may interpret non-specific terms such as “some” or “often” very differently. Therefore, be specific, and define what you mean or want. For example, it is better to ask how many times a week a respondent drinks soda than to ask whether or not he drinks soda frequently. “Frequently” could be once a month for one respondent and three times a day for another.

Write your questions in simple, easy-to-read language. Recruiters should be able to read the questions effortlessly, without having to figure out what you are trying to say. By writing easily interpreted questions, you reduce the chance that your recruiters and prospective respondents will misunderstand your meaning.

How Long Should the Screener Be?
The shorter the screener, the more likely your recruiter will be able to keep a potential respondent’s interest long enough to invite her to participate. However, some studies require multiple questions in order to identify and choose the respondents you want to interview. In that case, the question is not how long the screener should be, but how clear you can make the screening criteria. Long series of questions that might or might not terminate a potential respondent can confuse a recruiter, and you may end up with the wrong mix of respondents. In addition, multiple questions can annoy potential respondents by not being cognizant of their time constraints.

The key is to have enough questions to select respondents who are a good fit for your study and who hear enough to judge whether or not they want to participate in the study, and where the interaction has been long enough for your recruiter to judge whether or not each respondent can be an articulate interviewee. We will talk more about articulateness later.

What Must Be on a Screener?
A screener is more than a series of questions. Make sure your screener includes a place for the recruiter to record your respondent’s name and contact information. (Due to privacy laws, your recruiter may be able to share only a first name and last initial with your end clients.)

Your screener should begin with an introduction. The purpose of an introduction is to set the stage for the questions. Most recruiters (and I agree) will tell you not to worry about the wording, since recruiters know how to introduce themselves. However, your introduction should contain a brief synopsis of what is about to be asked, even if it is stated as a general topic. For example: “Hello. I’m ______, calling from ABC, a market research firm. Today, I’m recruiting people for a web-page usability study. May I ask you a few questions to see if you qualify for this important study?” This gives the respondents a context for their answers.

Then, after your questions, include an invitation to participate in your study. The invitation should contain as much information as the client is willing to provide about what will be discussed during the research.

How Do You Order the Questions?
The answer will depend on the type of study and your preferences. Here are mine. First, ask the questions that will terminate the most respondents first. Many clients like to have all of their basic demographic, past-participation and security questions up front, then follow with the screener’s meaty questions and end everything with articulate questions. If you are looking for respondents who meet narrow demographic specifications (such as those with household incomes above $250,000), then ask your demographic questions up front. If not, save them for the end. In medical or business studies where the answers to demographic questions rarely result in a terminate, start with your key questions, and leave everything else until the end.

Today, everyone is in a hurry, and most people (including prospective respondents) have ten other things competing for their attention. Ask the most important questions up front, when the respondents are at their freshest. If you ask an entire page of past-participation questions, only to find out two pages later that the person for your credit-card study does not have a credit card, you have wasted your potential respondent’s time and your recruiter’s time. Too much wasted time, and you run the risk of getting charged more.

Keep demographic questions together. Keep questions about subtopics together. The more natural the flow of your questions, the easier it will be for your respondent to follow and answer. The choppier your screener, the more openings there will be for mistakes to creep in.

One of my favorite examples of what not to do is found in many screeners written for alcoholic-beverage studies. First, there is a series of questions that ask whether the respondent drinks alcoholic beverages, which types of alcohol, how much alcohol, where he drinks the beverages and which brands he drinks. So far, so good. Then, the screener follows with a series of questions, and...
each question includes a long list of possible answers. The goal of the screener writer is to hide from the respondent the end client’s particular brand and type of alcohol. The unintended consequence is that the recruiter must keep flipping pages to go back to the chart of answers and scan down sequential columns to circle the correct answers.

Instead, it would be simpler and faster to ask one or more of those questions as open ended. If gin is the alcohol under consideration, with Bombay Sapphire as the brand that qualifies a potential respondent, consider eliminating the long list of gins and attendant brands. If a prospective respondent does not mention Bombay Sapphire, your recruiter terminates him. You have helped make the recruiting more efficient and maybe even saved a tree. After all, not all recruiting operations are computerized.

**What Are the Essentials, and How Do They Dictate Screener Length?**

Let’s take an example from a credit-card research project. Your client, a payment-card company, wants to recruit a group of its card members from its list, as well as a group of prospects from the recruiter’s database. What do we absolutely need to know about these people before they sit down with the moderator?

First, let’s look at the prospects. We will assume that the essential respondent specifications include people who make financial decisions, do not currently have a credit card with your client and are in a target demographic (for instance, they have household incomes over $75,000). Remember the correct answer to the question at the beginning of this article? The meat of the screener should address these specifications as efficiently as possible. For example, you can write one question to determine if someone is a financial decision-maker. To minimize the chances of your respondent picking the answer she thinks you are looking for, you can “blind” her by giving possible answers.

Q2. Which of the following statements best describes your role in the financial decision-making process for your household? (READ LIST. ACCEPT ONE ANSWER.)

a. I am the primary decision-maker with regard to financial decisions. (CONTINUE)

b. I share equally in the financial decisions. (CONTINUE)

c. I am not generally involved in the decision-making. (ASK TO SPEAK TO SOMEONE IN THE HOUSEHOLD WHO IS INVOLVED IN FINANCIAL DECISIONS.)
Consider whether or not you wish to eliminate those who have extremely negative feelings about the end client. If yes, you can add a question to screen out those who feel that way.

The Articulation Question
Many consumer screeners ask recruiters to eliminate prospective respondents who are not articulate, and some include an open-ended question from which the recruiter is asked to judge how articulate the response is. These open-ended responses help guarantee that a respondent will be comfortable and open during a research discussion.

There are two things to note here. First, trust your recruiters. If you are hiring a recruiting organization you use frequently, it is most likely because you have trust in their process. The recruiters will be able to glean a lot about a potential respondent’s personality during the screening process, so a note from the recruiter that this person is terrific should hold weight.

If you do include an additional question to terminate those who are inarticulate, ask an open-ended question that flows from or somehow relates to the topic. After all, the research interviews will not be discussing which people in history the respondent would like to invite for dinner, will they? No. They will be discussing credit cards. So, ask an articulation question that relates to credit cards or financial services. When you suddenly throw in a screener question about a topic completely unrelated to everything that has been already discussed, even the most articulate potential respondent can stammer for an answer.

Has This Helped?

Q3. Based on the information above, which of the following best describes how you feel about writing a screener?
   a. I feel I have been reminded about some important methods of putting together a user-friendly screener that will get me the right respondents.
   b. I would like more detailed information, but I think this is a good start on the basics.
   c. I do not think I learned anything from this article.

If you selected the first answer, that is what we were hoping for. If you selected “b,” fair enough; let us know what else you need. If you selected “c,” you are an expert already!

Creating the perfect screener is not based on a set of hard-and-fast rules, but rather a common-sense approach in understanding the interaction between a recruiter and a potential respondent, with the intent of recruiting the most appropriate respondents for a study. Screeners, at their best, are a quick way of ensuring that your respondents are the ones you need and want.
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When you think of Turkey, what do you imagine?

I once attended a seminar in which the presenter detailed the specifications of his multi-country study. While his respondents in Europe and the USA were given numerous religious options with which to identify (from agnostic to zootheist), his respondents in the Middle East were given no options whatsoever. This misperception fogs the minds of many foreigners prior to entering a Middle Eastern country, particularly Turkey. People think all Turks wear fez and ride camels. In Istanbul, however, you will find as many people wearing a NY Yankees cap, using an iPod and driving a Carrera as you would see in London.

Turkey is the only secular Muslim country, perhaps because it is one of the most industrialized nations in the world. So, get prepared for surprises: attire, hospitality, cuisine and Istanbul!

About half of the country’s residents are under 25 years old, which stands for nearly 36 million people. Youth in Turkey is one of the reasons why it rapidly and easily adopts new technologies and products. For instance, there are now more than 66 million mobile phones in use in Turkey; that is 92% of the entire population. Internet penetration rate is around 45%, which is a good indicator of rapid development: internet penetration was below 20% as recently as 2004. Turkey ranks in fourth place in the world in terms of Facebook usage, with 22.5 million members in July 2010.

Turkey is among the fastest-growing markets in the world, with the 17th largest economy. Like the country itself, market research is an emerging sector.

Qualitative Research in Turkey

Although fairly new, the Turkish market-research sector produced about $150 million (U.S.) of revenue in 2010, compared to $43 million in 2002. The heart of Turkish market research beats in Istanbul. This is not a coincidence, since Istanbul is the largest city in Turkey, followed by Ankara and Izmir.

We usually suggest and use Istanbul, Ankara and Izmir for our qualitative studies because they represent more than 30% of the Turkish population.
and create more than 30% of its gross national product. The data and insights we collect in these three cities best represent the country as a whole. If we need to talk to physicians, for example, it is normal to target only these cities where people are able to access all of the products and services that domestic and international brands offer. Since there are hundreds of hospitals in these three cities, different types of specialties are easily reached without going any farther.

This is not only practical but also logical. While there are nephrologists in Istanbul, there are none in the city of Mardin. Patients in Mardin who need a nephrologist go to the closest big city where a nephrologist practices. Therefore, you have to follow the same logic to find patients or consumers who regularly use nephrology drugs and/or devices.

This raises the point of geographic representation. Do not take the word “representative” geographically. Being representative does not always mean that we have to visit each of the 81 cities in Turkey. If you conduct a study on fast moving consumer goods (FMCGs), you can pick any city from the map. When you carry out a study among healthcare professionals, though, do not attempt to include every region in Turkey, since your product reaches only a dozen cities at most.

You can find perfect facilities for research in Istanbul, and decent ones in Ankara and Izmir, for your focus groups and in-depth interviews. Apart from these three cities, you will need hotels for your research.

Broadband internet connection (ADSL) has recently become common everywhere in Turkey. That is why we are now able to offer web streaming for focus groups and in-depth interviews, and some agencies have started providing such services.

Tips for Researchers
• Do not calculate the length of an interview according to the English language. A pilot session that lasts an hour in Chicago might easily take two hours in Istanbul. The number of words almost doubles when translating from English to Turkish.
• Do not force agencies to give you recruitment updates three to four weeks in advance of a study. If you want accurate updates, expect to receive them starting at most two weeks before your study begins. Otherwise, you will get different names every other day because we Turks do not often live according to fixed plans.
• Do not expect to conduct studies at dinnertime during Ramadan or at any time during Eid ul-Fitr or Eid al-Adha. Even though not everybody fasts or celebrates religious holidays, people benefit from these traditions.
• Turks are very sensitive about national issues, and they are proud of being Turk. On special days, it is not surprising to see international brands like McDonald’s or Coca-Cola celebrating Turkish national feelings on TV. When Cola Turka (a Turkish cola brand) entered the market in 2003, it benefited from being a Turkish brand compared to its international rivals.
• Women’s long struggle to take part in social and professional life has recently been bearing fruit unnoticed, even though this is still far from satisfactory. Conducting studies among

Broadband internet connection (ADSL) has recently become common everywhere in Turkey. That is why we are now able to offer web streaming for focus groups and in-depth interviews, and some agencies have started providing such services.
Qual in Turkey CONTINUED

There is no specific rush hour in Istanbul. It is always rush hour. So, plan your arrival or departure accordingly.

women with male moderators is not at all a problem. Turkey has been a secular country for more than 80 years.

• There is no specific rush hour in Istanbul. It is always rush hour. So, plan your arrival or departure accordingly. Do not always expect respondents to come to your sessions on time. Some may come too early, and some may come 10 to 15 minutes late.

• Hospitality is something Turks are really proud of. When we conduct ethnographic home visits, we know that visiting the respondents at home with a moderator, interpreter, cameraman and foreign client all together will not be an issue. People welcome us if they know that a foreigner is with us. That may be strange to understand, but the general population loves to interact with foreigners because most Turks do not see them often. We love to offer drinks to our guests (mostly black tea or Turkish coffee). Rejecting an offer is not welcomed. If you do not like tea or coffee, just ask for water instead. You must take something from us so that we will feel that we have shared something.

• With regard to Turkish cuisine, we are lucky. Turkey is located at an intersection where many cultures have passed through and inhabited for thousands of years. You can choose Middle Eastern and Mediterranean delicacies combined in one traditional Turkish meal. Most evening meals are fish. Raki (a strong anise-flavored brandy) is the inseparable drink of evening meals (at least, in restaurants) because raki and fish complete each other. If fish is not your preference, then you have dozens of mezes (hors d’oeuvres) to try.
Inspire both sides of the mirror

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First of all, a fact: The majority of all communication is nonverbal! Only a small portion of any communication is based on the words that come out of our mouths. The majority consists of body language, surrounding smells, tastes and many other clues.

One of the major criticisms I hear from my clients regarding online qualitative research is, “But you cannot see your respondents — how can you get good results without any nonverbal cues?” Or “What can be done to improve the communication and increase the learning and insight in an online environment?” Granted, while online communication is only text, platforms have improved, and nowadays respondents themselves are becoming more savvy and experienced and have many different ways to express themselves beyond typed letters. For the experienced researcher, the clues and tools are there, if you know how to “listen” to them.

Emoticons
Many people communicating online use “emoticons,” ranging from a simple smiley face to more sophisticated ones. Most platforms offer an array of emoticons that can be quickly selected.
and inserted into a post. In addition, respondents can use the keyboard to just type them.

Interestingly, there is a big difference in the Western and Eastern worlds of emoticons. In the West, we tend to make the distinction mainly with the mouth — e.g., :-O or :-) or :-8. The Eastern world keeps the mouth the same and instead changes the eyes: ** (stars) shows excitement, UU means tired, and ^^ is actually a smile.

**Modified Text**

Participants in an online qualitative study tend to carefully consider the words they use to make a point, and sometimes they use quite strong language. Respondents may also use punctuation and capitalization to emphasize their feelings or emotions. They might highlight or color different thoughts in different ways, or they might use different font sizes and capital or bold letters — “This is REALLY VERY important to me” or “This makes me so maaaahhh.” You can hear the intonation when reading the posts.

If respondents already feel comfortable in a chat environment, they may use abbreviations common in the world of text-savvy consumers. A special language is being developed for online communication (and even more for tweeting and texting, where space is limited). This saves time typing and conveys additional information about the emotions experienced that are not captured in words, but rather in abbreviations — for instance, ROFL (rolling on the floor laughing), LOL (laugh out loud) or BG (big grin).

In addition, respondents make themselves heard by using sound words and action words, such as hmmm, hehehe or argh. Sometimes, if you read a respondent’s post aloud, you can actually visualize that person speaking. Also, the online moderator may use icons and pictures (like a thumbs up) to show appreciation or involvement while reading respondents’ posts or when giving them more time to complete a task. In a face-to-face setting, the moderator would make eye contact with respondents who finish earlier and/or make gestures to show that others are just finishing; in an online setting, the icon tells the respondents, “It is all fine; I am just waiting for others to finish.”

**Colors**

Colors can also be used online to express feelings. For example, respondents can be asked to write a keyword in the color that would match their feelings. Some respondents even choose different colors for one word and tell exactly what made them choose a specific color. Although simple, this is a very effective task. While the color adds to better understanding, it is also appropriate to ask the respondent what feeling the color is supposed to convey and thus help the respondent to better express his or her feelings.

**Audio and Video**

Online qualitative research platforms offer possibilities besides the written word. More than just text can be collected when doing online qualitative research — with new media, faster internet access and improved platforms, digital media like photos, videos and voice can also be included. Ways to embrace pictures and voice include asking respondents to upload pictures and videos, search the internet for appropriate photos and videos (e.g., Google images or YouTube), use a webcam or voice recording or simply mail the pictures to the moderator, who can then upload these onto the platform.

Such images can capture the respondents in their own environment and express much more of their feelings for a subject. By choosing the type of picture or setting, the respondent provides additional information that the moderator can probe. Also, the videos may show body language and non-verbal information, sometimes even more than in a face-to-face setting, since respondents are in their familiar environment and not in a facility. In addition, the moderator can ask respondents to describe their actions and movements, such as why they would use the product in a specific way or make a certain move when opening or closing a product package.

**Pictures**

Online collages are one of the various ways to use pictures within an online discussion. Respondents can upload the pictures and explain what they want to say with each picture. In one international study, teenagers from around the world discussed their lives, and it was quickly possible to grasp what really was important in their lives — and what was special to each country — just based on the collages.

Picture sorting is also easy in an online environment. Respondents can drag and drop pictures and leave their comments on each one. In another study, results from this question — “What picture best represents your feelings for your cell phone?” — showed that, in different cultures and countries with different languages, some people chose the same pictures to communicate exactly the same feelings.

Pictures from a product or package can also be tested, with respondents choosing from smiley faces that they drag and drop to the point on the package that they like or dislike. Thus, respondents can show their feelings and be encouraged to articulate their emotions (happy, sad, confused, etc.). Typing in their thoughts at exactly the point of interest is like physically pointing a finger in a face-to-face situation.
The moderator will know exactly which area of an image the respondent is referring to, as well as the respondent’s feeling about that aspect of the product or package.

Another way to work with images is to encourage respondents to upload pictures to tell more about themselves. For instance, the moderator can ask them to create a profile similar to what they might post on a social-networking site. With this technique, a moderator can often learn far more (and far more quickly) about a respondent and his background than even in a two-hour focus group.

Avatars are another way of accomplishing this. Actually, sometimes it is more appropriate to ask respondents to choose an avatar, mainly to keep the research respondent anonymous. Also, however, the choice of avatar adds to the understanding and conveys a lot about the respondent. The respondent can be asked to explain her choice of avatar, allowing the moderator to not only identify respondents but also to get a deeper insight.

**In Summary**

Clearly, online qualitative research is not just plain text — it can also provide valuable, insight-revealing nonverbal cues. In fact, with the techniques described above, online qualitative research can be exciting, creative, diverse, individual and tasty — IF you know how to listen to it!

In one study, results from this question — “What picture best represents your feelings for your cell phone?” — showed that, in different cultures and countries with different languages, some people chose the same pictures to communicate exactly the same feelings.
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Although the phrase had its origins in the 17th century, *Stand and Deliver* was the title of a 1980s movie about a group of Latino high school kids in LA who had to prove they could handle advanced mathematics. And just like the kids in the movie, when qualitative research consultants give a client debrief, they are asked to stand and deliver — to “show their stuff.”

“Debriefs are scary. I feel put on the spot to put all the pieces together and seem smart.”

— Qualitative Research Consultant

A great debrief can add tremendous value for both the QRC and the client team, while a poor one can be the “kiss of death” for a moderator.

With some advanced planning and collaboration, though, client debriefs need not be terrifying. Understanding the value of debriefs and applying some practical tools can help QRCs take the pressure off and make client debriefs more productive.

For the purposes of qualitative research, we can define a debrief as a verbal report of study findings, delivered before the QRC has had a chance to develop final conclusions. Most of the suggestions here will be applicable to the “post debrief” that takes place at the conclusion of the fieldwork but before the QRC has had a chance to analyze the data. We will also touch on some ideas for “pre-briefs” (conducted before the fieldwork starts) and interim debriefs (conducted during the fieldwork). The research basis of this article includes 29 telephone interviews with both QRCs and buyers of qualitative research, representing a range of experience levels.
Smart QRCs rely on their client contacts to help them navigate and communicate with the rest of the client team. Ask the client contact about hidden agendas and feuding factions, and enlist his or her help in setting and managing expectations for the team.

The Power of Debriefs
Debriefs are a sometimes forgotten part of the QR process. Everyone is tired at the end of a long day of travel and focus groups, and few people (if any) want to take the time. The client will get the report in a week or two anyway. So, why bother with debriefs?

“Debriefs are something you must do well. Don’t resist it; hone your skills.”
— Qualitative Research Buyer

A great debrief can add tremendous value for both the QRC and the client team, while a poor one can be the “kiss of death” for a moderator. There are three reasons why debriefs are so powerful. An effective debrief can help a QRC:

• Manage the message. A good debrief provides a chance for everyone on the team to reach consensus about what they heard and what happens next. Nearly all of the QRCs and qualitative research buyers I interviewed used similar language: “I want everyone to be on the same page when they head back to the office.”

• Build client relationships. Collaborating with clients for better debriefs fosters strong, lasting client relationships. Clients want to feel they have gotten value from the money they are spending on the research. A good debrief cements that idea right away, without leaving the client team waiting anxiously for the final report.

• Facilitate the report-writing process. The debrief is a great opportunity for the researcher to get a handle on what is inside clients’ heads. That will help the QRC produce better quality reports, with a lot less anguish, and with a head start on the analysis and a better sense of how to structure the report and what to emphasize.

“If we don’t manage the debrief, we’re accepting that whatever happens is OK.”
— Qualitative Research Consultant

Six Steps to Better Debriefs
My research suggested six steps that QRCs and client teams can take to ensure more effective client debriefs.

Step 1. Plan the debrief process for each individual project.
It is surprising that some QRCs do not spend more time planning debriefs. People want to talk about what they have just experienced, so why not make it as productive as possible? Not all projects are the same, nor should all debriefs be the same. Go beyond one-size-fits-all thinking, and customize the debrief to fit the project.

Envision the debrief as a process, integrating that process into the research proposal — why it is necessary and how the team will get there. Planning the debrief process together encourages QRCs and their research partners to think through how they will approach the debrief and how they will prepare the client team for their participation.

Here are some tips for planning the debrief process:

• Ask how quickly the client will start making decisions based on the research. If they can wait a week for your analysis and report, a high-level debrief might do. If they need to make decisions right away, suggest a work session the morning after the fieldwork ends.

• Think through what the client team needs. If they are new to qualitative research, suggest a pre-brief to give them a grounding in how to listen effectively.

• Everything flows from the objectives, so be sure to plan debriefs that will keep the client team focused on the objectives.

• If you think of debriefing as a process, the final one will not be so challenging; instead, it will tie everything together.

• Include time in the project schedule for pre-briefs, interim debriefs and final debriefs so client observers can see that debrief sessions are an integral part of the process.

• Consider the project logistics. Can you start earlier, with 20 to 30 minutes built in between groups for interim debriefs?

• Find out who will observe, and plan debriefs that give everyone a chance to contribute and yet respect the power dynamics within the client team.

The QRCA Professionalism Committee has written a guide to observing qualitative research. QRCA members can download the guide from the QRCA website, and adapt it for their own use at:

Structured Exercises for Client Observers

One of the most controversial topics in the talks I had with QRCs and research buyers was the benefits of providing structured exercises for back-room client observers. The idea is that structured ways for taking notes can facilitate active-listening client observers and help them absorb and organize what they hear in open-ended explorations. For example, you might assign each client observer to track a specific respondent or follow comments on a certain theme or issue. Or you might distribute note-taking sheets divided into categories such as “confirmation,” “surprises,” “things that are working well,” “things we need to improve,” etc.

On the positive side, structured exercises can be helpful for clients new to observing qualitative research, and they can help client observers engaged when the inquiry is open-ended and exploratory. Exercises can aid recall for the debrief and help encourage innovation. And even if some observers do not participate, exercises can help stimulate discussion.

There are also drawbacks. Structured back-room exercises need client buy-in to work well, and some client teams may be resistant. Exercises can interfere with how people naturally listen and, hence, be more of a distraction than an aid. Some QRCs feel uncomfortable asking observers to “play along” with these techniques. Situations in which structured back-room exercises may be less helpful include evaluations of concrete stimuli (e.g., concepts, products, packaging), clients who are experienced in observing qualitative research and projects with a longer decision timeline.

Decision Checklist for Back-Room Exercises

- How comfortable and confident do you feel using exercises for observers?
- Are exercises appropriate for this project?
- What value will they add to the project?
- Does this client believe in the value of these exercises, and will she partner with you?
- Are you willing to create fresh, new exercises specifically for this project and explain their value to the client team?
- For this project, would it be better to conduct a pre-brief session on active listening and critical thinking?

Step 2. Partner with the primary client contact.

It is vital to get the client contact’s buy-in to the debrief plan because he will help sell it to the rest of the client team. Convince him of its value: better alignment with the process and better management of how the learning is disseminated.

The client contact can fill the QRC in on the project’s history and the politics (who the key players are and what is at stake). Smart QRCs rely on their client contacts to help them navigate and communicate with the rest of the client team. Ask the client contact about hidden agendas and feuding factions, and enlist his help in setting and managing expectations for the team.

“Compare notes with your client contact about what point of view you will express in the debrief session. Don’t ‘go rogue.’”

— Qualitative Research Buyer

Step 3. Listen and learn.

A debrief is not a presentation. It is a conversation in which every team member shares what he or she heard, and the team processes that feedback toward consensus. No one expects the QRC to have all the answers. But the client observers do expect you to participate, listen and express your point of view on what it means for the project.

Your goal here is to get the observers talking. Listen and respond to what the observers say, and integrate those comments with what you heard and saw. The best debriefs are conversations that allow client observers to process and make sense of what they heard.

“When I was younger, I wanted it to be perfect. That’s the opposite of what you should do. I used to think I had to present findings, but it is more important to hear what the clients heard.”

— Qualitative Research Consultant

It is a natural response to think we have to do all the talking in a debrief, but here are some tips to help you become a better listener. First, ask for a few minutes just before the debrief to review your notes and write down the key points you want to make about each objective. This will help you stay on track. As the debrief progresses, take notes on what others say, and test your own assumptions against others’ views.

Start the debrief with a question — the observers want to talk, and this will start the conversation. It is also fine for a QRC to start the conversation, but the focus should shift very quickly to hearing from the observers. While clients are speaking, be respectful of their expertise, and let them finish their points. Keep an eye on client observers, and read their body language; even when people are not talking, they are saying a lot.

Use your moderator listening skills to make the debrief more productive — ask questions for clarification, and push back a little to help deepen the discussion. And finally, record the debrief conversation on a digital recorder for reference during the analysis.

Step 4. Engage the entire team.

It is important to get every one of the observers to contribute to the debrief conversation. This helps the client team feel a sense of ownership and collaboration regarding the process, and it helps the QRC build better client relationships by understanding the issues and stakeholders more completely.

QRCs need to be sensitive to the politics and the client’s corporate culture. Acknowledge the powerful people on the team, but be sure to keep the conversation flowing so they don’t dominate.

Tips for engaging client observers in the debrief include:

- Remind observers at the start of the day/evening that there will be a conversation at the end of the day.

The best debriefs are conversations that allow client observers to process and make sense of what they heard.
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Always keep the focus on the study objectives, the big picture. Don’t let observers get distracted by what happened in that one oddball group.

Interim Debriefs

The final debrief will go more smoothly if the QRC and the client contact check in with each other at least once a day during data collection. The focus in these interim debrief sessions should be three-fold:

- Are we asking the right questions in the right way? Are we getting the right people? (This is especially important on the first day.)
- Are we hearing things that might make us want to refocus what we are asking? What can we build on, discard, incorporate?
- Are we getting the information we need to meet the objectives? Is the team staying aligned with what we are hearing?

- Move the group to the respondent room; they will listen better, and the aura of the respondents lingers.
- To stimulate discussion, show the research exhibits or exercises that the respondents created.
- Don’t start with the most-senior person, and make sure everyone gets a chance to speak.
- On a flip chart, write what client observers say. This gives people a focus so they pay closer attention.
- Keep it short — under 20 minutes — especially if it’s late in the evening.
- Keep moving; the outline you made will help you move the group from point to point.
- Nip internal arguments in the bud; note the issue on the flip chart for future follow-up, and move on.
- Keep the conversation balanced. Find both positives and negatives, and don’t let the energy spiral up or spiral down.

Step 5. Work toward consensus.

This is the step that all the planning and collaboration lead up to — making sure that everyone leaves the data-collection phase with a general consensus about what they all heard and where the project is heading. The QRC’s goal here is to make sure that the observers do enough processing of what they heard to lead to general agreement on the high-level issues.

Within that overall goal, there are three themes to develop as the client team comes to consensus:

- Always keep the focus on the study objectives, the big picture. Don’t let observers get distracted by what happened in that one oddball group.
- Build your credibility as a consultant by helping observers understand what they saw — whether it’s the meaning you found in the projective exercises or relevant experience from similar projects.
- And then there is the big caveat: discourage jumping to conclusions. Get the group to agree that the consensus they have reached is preliminary, subject to your analysis and their reflecting on it as well.

Here’s a general road map for helping the conversation flow toward consensus:

- Make sure observers talk things through.
- Keep the conversation strategic; focus on what the team has learned.
- Watch for agreement, and work toward consensus around each objective.

- Acknowledge disagreement; clarify that it cannot be resolved now, and move on.
- Summarize consensus on three or four core ideas that the team can start on right away.

Step 6. Create a written deliverable.

This step might be controversial; some of the QRCs I spoke with made the valid point that they do not want to train clients to expect a written report right away. If one of a QRC’s goals, however, is to make sure that everyone leaves the field on the same page, a tangible deliverable of some sort will go a long way toward making sure everyone returns to the office with a common story.

This is not a report, and it need not be long or formal, but something that is an early record of the consensus reached will benefit the entire team. The easiest way to do it is to keep notes during the post debrief on a flip chart. Transcribe them the next day, and send them to the client contact to distribute to the team.

Here are a few other ideas for written deliverables:

- Type up your own notes at the end of each day.
- Hire a note-taker or have a colleague take notes; distribute notes to the team each day.
- Mind maps.
- Distribute photos of respondent-exercise output to the team.
- Give clients Livescribe pens to take notes; you keep the pens, and the clients keep the notes.
- Get the client team together the next morning, and hammer out a report.
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Vegas Vignette:
One Local Moderator’s Own Visitor’s Guide
Las Vegas... casinos, showgirls, neon signs, dollar bills, cheap buffets, Elvis and wedding chapels. All are images that might come to mind if you were asked to create a collage about Las Vegas in a focus group. I have lived in the area off and on for over ten years, however, so if I were a respondent in that focus group, my collage would instead include shopping bags from Kiehls or Barneys New York, ticket stubs from the Lion King production and a photo of someone rafting down the Colorado River. So, grab your sunglasses and some really good walking shoes, and let’s go explore some things you will not want to miss while attending the QRCA conference this fall.

**Theater, Vegas Style**

Las Vegas is well known for Cirque du Soleil, and there are now seven Cirque shows on the Strip. If you are a fan of the Beatles or Elvis, you might want to check out LOVE at The Mirage or Viva Elvis at Aria. Bellagio’s O is well worth checking out, as is the classic, long-playing Mystere at Treasure Island.

Is traditional Broadway more your style? Phantom of the Opera at The Venetian is worth seeing for the theater alone. There is also The Lion King at Mandalay Bay or Jersey Boys at the Palazzo. Blue Man Group always entertains (they paint themselves blue and bang on drums nightly at The Venetian), and there are plenty of magic shows to choose from, including David Copperfield at MGM Grand or Penn & Teller at the Rio. If you happened to have a poster of Donny Osmond on your wall when you were a teenager, you will probably want to catch Donny and Marie, currently performing at the Flamingo.

Always wanted to go to one of those interactive dinner shows? Check out Tony & Tina’s Wedding at Planet Hollywood or Tournament of Kings at Excalibur. Remember the guy with the puppets who won “America’s Got Talent”? He is here, too — Terry Fator does his ventriloquist gig at the Mirage. And for classic Vegas, showgirls and all, go see Jubilee at Bally’s.

**Nightlife**

Las Vegas is the nightlife capital of the world, and just about anywhere is a good place to get your drink on, bust a move and see the pretty people — tourists and locals alike — who come out at night to play. If I had to recommend a few of the most popular spots, check out XS at Encore, Tryst at Wynn or Marquee at The Cosmopolitan. Of
course, your mileage may vary depending on your tastes, so ask the concierge or cabbie, or search Google for more information.

**Attractions**

Let’s start with thrills of the amusement-park kind. If rollercoasters that hurl you at high speeds around hotels is your thing, The Rollercoaster at New York New York is a must. You can also get married while riding, should you so choose. (There is a reason we are known as the “The Wedding Capital of the World.”) Or you could drive the 30 minutes or so to Primm and ride the Desperado. It is ranked as one of the top ten in the world for the tallest steel rollercoaster drop. If you truly are an adrenaline junkie, head to the top of the Stratosphere, and scream your lungs out four different ways on thrill rides that dangle and shake you over the edge of the tallest building in North America west of the Mississippi River, more than 1,000 feet in the air. Or experience a simulated skydive at Vegas Indoor Skydiving (a good bet if you are too nervous to try the outdoor kind).

For a more low-key thrill, check out the Shark Reef Aquarium at Mandalay Bay (a great place to go if you are bringing the kids along). Also on that end of the Strip are The Titanic and Bodies exhibitions at the Luxor. Both are well worth a visit. You will definitely want to visit the Conservatory and Botanical Gardens at the Bellagio, which changes every season. While you are there, head outside to watch the Fountains of Bellagio dance to a Broadway tune. Across the street, the view from the top of the Eiffel Tower is phenomenal.

For vintage Vegas, head downtown to visit some of the older casinos and the Fremont Street Experience. For $20, you can ride a zip line under the Viva Vision canopy, going speeds of up to 30 mph. And if there is one souvenir worth taking home, it’s a picture at the famous Welcome to Las Vegas sign located on the south end of the Strip.

Finally, I am not sure if spas are considered an attraction, but I think they are one of the best things about Las Vegas, and you will need one after all of the walking around. The luxurious Roman baths at Qua at Caesars Palace make it my pick for best spa. However, the last time I was there, it was overcrowded, so I am not going to send you there. Instead, try the spa at Bellagio or one of the spas at City Center.

**Recreation**

A recent study indicated that 70% of people living outside of Nevada think that Las Vegas residents live in, and never leave, the Strip hotels. Obviously, I am joking; however, I can’t count the number of times I have been asked if I live on the Strip. And it is true that a lot of people think Las Vegas consists only of the Strip.

The reality, though, is there is so much more to do here. Our (mostly) mild seasons make it a great place to enjoy the outdoors, and the weather is fantastic in October, with average daytime temperatures in the 80s. (However, unlike in the middle of summer, it actually cools off at night, so be sure to bring a jacket.) Not only do we have great options nearby, but we are also within an easy drive to Zion National Park and The Grand Canyon. Don’t want to venture quite that far? Just outside the city, you can enjoy the views and a hike in Red Rock Canyon or at the Valley of Fire State Park, located just 55 miles away. Due to the mild weather, October is a great time to visit and hike both.

Hoover Dam is worth a tour, and if you visit, be sure to include a stop in historic Boulder City. Eat at The Coffee Cup featured on The Food Network’s show “Diners, Drive-ins and Dives,” and get close to bighorn sheep at Hemenway Park. Nelson’s Landing, located just 25 miles from Boulder City, is a beautiful drive and a great spot to put a raft in the water or go cliff diving.

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of the strip is the Springs Preserve, a cultural destination, built on what is considered to be the city’s birthplace. It is a great way to escape the business of the strip, while learning more about the area. While you are there, eat at the Springs Café by Wolfgang Puck, and enjoy the beautiful view. And, last but not least, October is a great time to visit one of our many world-class golf courses.

Eat + Drink
Las Vegas has come a long way since the days of cheap buffets, 99¢ shrimp cocktails and $2.99 steak and eggs. These days, hotels are packed with world-class restaurants, and most have a list of restaurants that are sure to please even the pickiest palate. I can’t even begin to scratch the surface of the culinary delights that await you, so if you really want to explore the food while you are here, be sure to do some research before you come.

If you are not on a budget, consider Joel Robuchon at MGM Grand or Charlie Palmer’s Aureole at Mandalay Bay. The latter features “wine angels” who “fly” the four-story wine tower to retrieve your wine. Can’t get a reservation at the famous Rao’s in Harlem? You can get at the location inside Caesars Palace, which serves both lunch and dinner. For breakfast, try Society Café at Encore. Sit outside and enjoy the views while dining at Mon Ami Gabi (try to sit by a window), and order the Butternut Squash Tortelli. You can thank me at the conference.

Enjoy tea and views of the Strip at an authentic Tea Lounge inside the Mandarin Oriental, part of City Center. Head over to Las Vegas’ newest property, The Cosmpolitan, and find the secret pizza place. No, it is not called the Secret Pizza Place; it doesn’t actually have a name, menus or a sign. And if you don’t want to leave The Venetian, there are plenty of great options there—be sure to satisfy your sweet tooth with a pastry at Bouchon Bakery.

The improvements in quality, variety and experience make today’s Vegas buffets well worth it. Check out the buffets at Wynn, Bellagio or Paris. The lines tend to be long, so you may want to skip peak mealtimes. For classic Vegas off of the Strip, try Piero’s, Golden Steer, where Frank Sinatra was a regular, or the Peppermill. The Fireside Lounge at the Peppermill is a great place for exotic drinks.

If you find yourself downtown on Fremont Street, go have the beef brisket sandwich at The Beat Coffeehouse, which has a vintage, artsy, beatnik vibe. They also have a collection of new and classic vinyl you can listen to while you hang out.

Now, back to that 99¢ shrimp cocktail. For vintage Las Vegas and Las Vegas’ Original Shrimp Cocktail, go to the Golden Gate downtown. It is no longer 99¢, but at $1.99, it is still a fantastic deal. Finally, get a sweet treat at another classic institution, Luv-It Frozen Custard, a “walk-up” frozen custard place located just off the Strip in the downtown area.

Shopping
The shopping in Las Vegas is nothing short of fabulous. At one of the nation’s largest malls, the Fashion Show Mall, conveniently located on the Strip across from the Wynn casino, you will find a good mix of upscale shops, as well as the Gap. Most hotels also have some sort of shopping area or mall-like aspect. The Forum Shops at Caesars Palace and the Miracle Mile Shops at Planet Hollywood are my favorites and offer a great variety of shopping, along with a fun, entertaining atmosphere.

If you are looking for super high-end, check out The Shops at the Palazzo, home of Barneys New York and Jimmy Choo, or Crystals at City Center for Pucci, Gucci and Hermès. If outlet shopping is more your style, Las Vegas Premium Outlets is conveniently located downtown, just off of I-15, and includes a mix of high-end and more traditional outlet stores. Or drive south on I-15 for approximately 30 minutes to the Fashion Outlets in Primm. It is worth the drive for the Williams-Sonoma outlet alone. One of my favorite places to shop is Town Square, an outdoor shopping, dining and entertainment complex, located on the south end of the Strip.

In conclusion, there is a lot to see, do and eat in Las Vegas. Don’t forget your comfortable walking shoes, and we will see you at the conference in October!
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Over the past two years, QRCA has brought you almost two dozen podcasts of interviews conducted by QRCA members with influential leaders from qualitative research, strategic consulting, academia and other relevant fields. You can listen to these interviews right on the QRCA website as streaming audio, or you can download the mp3 file to your laptop or portable player for listening on the go. You will find the podcasts under the Publications link at www.qrca.org.

Be sure to check out this month’s podcast interview with Susan Spiegel Solovay and Barbara Newman. Co-directors of the consultancy BrandVisioning, these senior-level creative directors have brought their intuitive brand of creativity to global businesses around the world. Among other techniques, they specialize in the use of hypnosis in focus groups for deep dives into consumer brand perceptions. They have strategized and created some of the industry’s most memorable campaigns, including The Best Part of Waking Up for Folgers coffee, It’s Your Life. Feed It Right for Slim-Fast, Moms like you choose Jif for P&G and We Fit America for Fruit of the Loom. They have worked their magic for Disney, Duncan Hines, Kool-Aid, Olive Garden, Dove chocolates, Post cereals, Land O’ Lakes, The Egg Board, Fresh cosmetics and so many more. With heart and soul, and delicious “eat the screen” visuals, their work connects people to brands, and brands to their people. They are interviewed in this podcast by Sharon Livingston, Ph.D.

Also, be sure not to miss Kay Corry Aubry’s interview with Liz Van Patten, QRCA board member and head of Van Patten Research (and author of our Business Matters article on client debriefs in this issue of VIEWS). A veteran QRC with more than 25 years’ experience with dozens of Fortune 500 companies, Liz is particularly skilled in branding research. In 2008, she co-founded See Me Speak Communications, a consultancy devoted to helping research professionals improve the development, design and delivery of in-person and remote presentations. She was honored, also in 2008, with the QRCA President’s Award for her work producing QCast. Through her newest venture, Liz designs and executes domestic and international online qualitative research projects and online insight communities in a wide range of industries.

Find these informative new podcasts — as well as interviews with Andrew Ballenthin, Mary Ellen Bates, Scott Berkun, Ilse Bunan, Bill Buxton, Sean Campbell and Scott Swigart, Stephen Covey, Paul Gillin, Judith Glaser, Kenneth Gronbach, J. Robert Harris, Bill Hartman, Jackie Huba and Ben McConnell, Andrew Kent, Jim Loretta, Dr. G. Clotaire Rapaille, Dave Siegel, Jean D. Sifleet, Linda Kaplan Thaler and Robin Koval, and David Vinjamuri — all at www.qrca.org.
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I came across Delivering and Measuring Customer Service by Richard D. Hanks, president and CEO of Mindshare, because I was being inquisitive when a survey arrived shortly after I returned my car to one of the major car-rental companies. This company uses Mindshare software to track customer satisfaction after every rental car is returned. It was from the company’s website that I came across the book, and I am so glad I was inquisitive that day. This book is now in a second edition, with updated information included, and this review refers to the second edition.

Hanks’ writing style is very comfortable, making this book like an afternoon chat with an old friend. The most wonderful aspect of reading this book is that Hanks does not drown you in complex techniques or advanced statistical theories. From the beginning, it is very practical — “A concerted focus on executing the basics is the single most important thing your business can do today.”

The introduction starts, “Have you ever had such a lousy customer-service experience that you wanted to smack your server upside the head? It may have been in a restaurant or clothing store, on an airplane, or on a phone call…”

Hanks goes on to talk common sense throughout the book. That’s not surprising, considering he is the founder of Mindshare, a customer-measurement practice where he has accumulated an enormous amount of customer wisdom from measuring employee and customer feedback for many years.

Hanks defines the difference between a satisfied customer and a loyal customer, and he stresses the importance of loyalty over satisfaction, while noting how the two are very closely interwoven. He defines customer loyalty as “a higher share of wallet, mind and mouth.”

He takes the reader down to the level of hiring the right kind of employees to make sure that the right attitude is in place on the customer front. These employees must be willing to accept customer complaints, which form the basis of improvements within the company. His belief is that you can teach skills later, (2) employee attitude is much harder to change, and (3) you need to avoid “cheerful incompetents.” You should look for employees who “play well with others.”

Hanks encourages the old Tom Peters philosophy of managing by walking around, and he updates it to experiencing your business as a customer, adding that according to General Patton, “No good decision was ever made in a swivel chair.”

This book is written from the experience of running a research practice that advises clients on customer measurements. The process used by Mindshare to measure customer experience is summarized in two questions:

1. What do customers want (product, process, people)?
2. How am I doing in giving them what they want (execution)?

In the section on gathering customer feedback, Hanks talks about various data-gathering methodologies, the wisdom of offering incentives and the redemption rates of those incentives. He also discusses the details of surveying customers (from sample sizes, response rates and controlling fraudulent survey responses to a discussion of social media, or SM) and the lack of actionable information that comes from trawling the SM world. He has suggestions of how to turn those SM comments into actionable information, and the comment-makers into “fans” of your company, while suggesting, “The wide-open west of social media as a feedback tool is destined to acquire more structure.”

Hanks believes that quality improvement for companies is an ongoing process and that the great companies are always listening and challenging themselves to improve and repeat the cycle. “To companies like Honda, Toyota, Intel and Apple,” he says, “success is not a single accomplishment; it’s an ongoing process.”

If you are a “quant jock” or have a fascination with numbers, the chapter on analyzing the data will be of high interest. Here, the author shows a huge number of examples of how Mindshare employees present data to their clients and of how “alert reports” can be used to deal with problems immediately for successful outcomes, and he makes recommendations on how to analyze the data gathered.
The next section, on using customer feedback to improve, begins with a discussion about the speed of responsiveness. “Urgency is an attitude, an approach to excellence.” Hanks stresses the importance of taking action and institutionalizing the continuous improvement concept, not only into employee training but also into the review process and bonus plan implementation.

To me, one of the strongest points Hanks makes in this section relates to the importance of consistency. How many times have we all gone into a hotel chain, restaurant or store, knowing that this one location is much better than any of the chain’s others in that area? Averages are not that meaningful if your best is doing 90% on a scale, but your worst is at 65%. The average might be OK, but the poor customers who go into the 65% location will not be your evangelists.

Hanks has many suggestions for how to implement consistency into franchise operations and multi-unit operations. However, his most important point is to “make customer feedback and measurement a ‘Brand Standard’ of your company.” How many of us have had clients who treat the results they get from our work with half-hearted indifference? The research is done; now what? Reading this book will give you plenty of ideas on how to help clients integrate their research results into the larger picture of customer measurement and loyalty.

The section on customer recovery and follow-up encourages thinking about customers as a lifetime asset, not just the last $20 sale. The example given is a customer who buys from your pizza store every two out of three weeks, at $20 a visit. Over the next 30 years, that customer is worth $21,000, and that does not even account for the price of your pizza going up, or the number of times she refers your store to friends and neighbors. Surely, from that perspective, a customer is worth a lot more than her last sale.

The last section offers tips and tricks, including: never aiming for less than 100% customer satisfaction; measuring a customer’s total experience, not just the service parts; and managing the customer’s perceptions from the peripheral clues he gets about you. And there are a host of other very practical, tactical and useful tips to make use of the customer feedback that the book encouraged all along.

Full of wisdom, this book should be on the shelf of every businessperson who deals with customers in even the smallest way.
In the introduction to Sun Tzu For Success, author Gerald Michaelson defines Sun Tzu’s Art of War as the “world’s first self-help book.” Wikipedia, however, defines it as the “definitive work on military strategies and tactics of its time.” Sun Tzu wrote from the perspective of a high-ranking military general, and his writing reveals his philosophy of a strategy to win without fighting. It is from this viewpoint that I read Michaelson’s Sun Tzu For Success.

For readers who may be unfamiliar with Sun Tzu, the entire text is provided in Book One. The inclusion of The Art of War provides an excellent opportunity to familiarize, or re-familiarize, yourself with one of the most important historical documents on military strategy. To this day, lessons in The Art of War are used by military strategists, and they are also being interpreted and applied by personal and corporate strategists such as Michaelson.

In the first three sections, Michaelson provides the reader with a self-help approach to problem-solving. Michaelson’s interpretations of Sun Tzu could be effective for many, but for this reader, some of his interpretations and examples were distracting and disconcerting.

For instance, in Section One, “Personal Characteristics for Success,” Michaelson recounts a story of an athletic coach who was forced to resign from his position due to the university’s discovery of a series of lies. Michaelson writes, “Not really big lies — he’s a football coach after all, and his win-loss record is what counts.” I was distracted by Michaelson’s message that personal integrity is important only if the lies told are “big lies” and that a coach’s integrity is not as important as his win-loss record.

Section Four, “Strategies for Success,” focuses on priorities and timing. Michaelson offers useful insight on how to effectively choose your battles and understand your adversaries.

Section Five, “Examples of Success,” is a compilation of what Michaelson describes as examples of how “leading-edge thinkers and doers apply Sun Tzu’s wisdom to enhance their future.” Michaelson includes an example by Edward Speed, senior vice president of strategic planning for the San Antonio Credit Union. At a management conference, Mr. Speed suggested that The Art of War might be applicable to a particular business situation. Being unfamiliar with The Art of War, a colleague responded negatively to his suggestion. Instead of using the moment to educate his colleague, he writes that the young colleague’s response was “arrogant” and “laced with ignorance.” Michaelson’s inclusion of Speed as a leading-edge thinker and doer made me wonder if Michaelson had forgotten why he had written Sun Tzu For Success.

In my experience, learning is a lifelong process. The definition of ignorance is not based on reading, or not reading, The Art of War. Sun Tzu’s strategies in The Art of War are left to individual interpretation. In his book, Michaelson offers his interpretation of Sun Tzu and provides some useful and interesting ideas and tools, but they are often in conflict with the point he makes regarding the chapter under discussion from The Art of War. The two examples cited above demonstrate where Michaelson had an excellent opportunity to weave in some teaching about Sun Tzu’s theories, but he resorted to accepting objectionable behavior (lying from a college coach) and criticizing an uneducated comment (from a colleague unfamiliar with The Art of War), missing the opportunity of “mastering challenges,” as the subtitle of his book suggests.

Borders had this book on display on a table in the business section recently, when I walked in to one of their last remaining stores in the area. If you see it displayed prominently in the same way, take more than the cursory glance I took before you buy it.

Michaelson’s interpretations of Sun Tzu could be effective for many, but for this reader, some of his interpretations and examples were distracting and disconcerting.
The Art of Convening: Authentic Engagement in Meetings, Gatherings and Conversations
Craig and Patricia Neal with Cynthia Wold
Berrett-Koehler Publishers

Review by Laurie Tema-Lyn
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Art of Convening, by Craig and Patricia Neal with Cynthia Wold, is a jewel of a book that should resonate well with research consultants interested in mastering both the inner and outer dimensions of convening meetings. The Neals bring an enlightened approach to preparing for and conducting meetings that are authentic engagements—a genuine expression of what is “true” for convener and participants. The Art of Convening provides a holistic, perhaps spiritual, perspective on meetings that can inspire qualitative research consultants in working with research participants and client teams.

Craig and Patricia co-founded the Heartland Circle Institute 25 years ago as an organization devoted to catalyzing essential conversations. In addition to conducting leadership training, they are known for their “Thought Leader” gatherings and skilled convening methodologies.

The Art of Convening provides a framework that goes beyond conventional facilitation to deep connection. In each chapter, one of the nine steps of the convening wheel is explained, along with key challenges, principles, self-reflective questions and pragmatic tips for implementation. The book is also sprinkled with stories, giving examples of success and watch-for’s, along with additional exercises and personal-journaling questions to advance leadership growth.

The nine Aspects of the Convening Wheel, with a short description of each, are:

Step 1: “At the Heart of the Matter.” If we wish to lead authentic engagement, then we must begin with work on ourselves as human beings, the authors claim. We have to enter an awareness of how we will be in relationship to others.

Step 2: “Clarifying Intent.” This aspect helps clarify the convener’s intention so that it is aligned with the purpose of the gathering.

Step 3: “The Invitation.” The convener extends to the group a sincere, warm offering that integrates purpose and intention. The desired result is that when participants show up, they will arrive with presence, ready to participate fully in the gathering.

Step 4: “Setting Context.” The convener communicates the form, function and purpose of the engagement, as well as its intent. Providing a transparent agenda goes a long way toward creating trust, a foundation for authentic engagement.

Step 5: “Creating the Container.” At this stage, the convener creates the physical and energetic field so that the gathering will be enlivened, has boundaries and is safe for experimentation and expression.

Step 6: “Hearing All the Voices.” The convener plans and designs the gathering to achieve full participation, in which each person speaks, is heard and is present. Good listening — without impatience or judgment — is the core of this step.

Step 7: “Essential Conversation.” In this stage, the convener encourages and demonstrates meaningful exchange within an atmosphere of mutual trust.

Step 8: “Creation.” The convener plans, nurtures and sets the conditions for something new to emerge from engagements of shared purpose and trust.

Step 9: “Commitment to Action.” The convener helps individuals or group members to be responsible and accountable for the path forward.

In “Creating the Container,” the authors recommend setting up meetings in a circle: “The most ancient ‘technology’ for human gatherings most likely started around the campfire and continues today as the most effective form of creating presence and connectivity. The circle creates equality and peerage among those present, even in a hierarchical environment. Everyone can see and hear one another... There is no hiding in the circle.”

These days, since so many meetings are not in person but by teleconference or online, the authors construct a “Virtual Campfire.” In their tele-gatherings and trainings, they greet each participant by name and a heartfelt welcome, and ask participants to agree to the following four protocols: “We agree to be fully present. We agree to confidentiality. We agree to identify ourselves. We agree to ask for what we need and look for surprises.” They go on to invite participants to imagine that, instead of sitting in the participants’ respective homes or offices, they are gathered around an intimate campfire together.

I used this approach recently when a northeast blizzard unexpectedly changed what would have been an in-person consumer session to a teleconference, and it immediately warmed up our group of strangers.

A “Stringing the Beads” exercise in the “Hearing All the Voices” chapter offers an elegant and efficient practice for the convener to invite the participants to introduce themselves and say a few words about what is currently going on for them. When they have concluded their remarks, participants say, “I have spoken,” so that everyone knows they are finished and not just pausing.

Whether or not you follow every activity suggested in Convening, you will likely find yourself thinking differently about preparing and conducting both research and client-team meetings. Your gatherings are more likely to be heartfelt, authentic engagements and conversations whose outcomes are productive and mutually satisfying.
It seems that everyone has a smartphone these days. And where there are smartphones, there are apps! Thousands and thousands of apps pop up every day to solve many of life’s everyday problems, organizing us, streamlining us, connecting us and, of course, entertaining us.

There’s an app to tell you if the can of green beans you are about to put into your grocery cart is a better price at another store around the corner. There’s a game app that requires you to lick your smartphone screen (yes, with your tongue) to rack up points. There’s an app to melt faces in your photo gallery. There’s an app that tells you the best parts of a movie for running to the lobby for a “bio-break.” There’s an app that has no other purpose than to emit the fullest known variety of flatulent sounds. There’s even an app called Nothing, and it truly does nothing (but you still have to buy it).

There are also apps for qualitative research. Some of these are pretty nifty, but the Humor Column team did a little brainstorming; we wanted to really push the envelope to take full advantage of smartphone capabilities, and we came up with ideas for some incredible apps for qualitative research. Now, some of these may be a little rough around the edges in concept, but hopefully there is at least a kernel of a good idea somewhere buried within each one.

With Dominator Pause, whenever a respondent begins to dominate uncontrollably you simply point your smartphone at him or her and press the # key, and that person will pause in mid-sentence, allowing you to continue an orderly discussion with the rest of the group.
So, is this the future of qualitative research? OK, probably not. But, still, while we can’t say there already is an app for that, perhaps we can say there ought to be an app for that.

**Apps for Research Buyers**

**Budget E2R**
For client decision-makers, this nifty app will instantly convert budget expectations into budget reality (“E2R”). For example, type in that you expect to give an incentive of a ballpoint pen for a two-hour interview with cardiac surgeons, and you will see a more appropriate incentive appear in the spreadsheet. Type in that your goal is to develop a strategic plan based on a single focus group, and the spreadsheet reminds you that, for your goal, you really need a bit more research than that.

But, hey, don’t be nervous — when you hire QRCA members, not only do you get great researchers, but also great budget-management partners. We can come up with the best ways to develop a reality-based research plan that stays within your budget expectations. We may even end up rendering this app obsolete before it is even invented!

**QualCloud**
QualCloud brings the best of cloud computing to qualitative research. Sort of. The idea basically is this: no matter how good any QRC is, you still get only one person’s skills and experiences. With QualCloud, you don’t need to hire just a single qualitative researcher; instead, you can tap into a “cloud” of many moderators, depth interviewers and ethnographers to collectively gather insights from your respondents. Bring your respondents in for interviewing, and then post your research objectives on QualCloud. Within seconds, you will have thousands of qualitative researchers lining up to ask the next question. You pay by the question, and pre-registered researchers will be paid automatically out of your PayPal account. Why tie yourself to just one researcher, when you can have a cloud instead?

**Apps for QRCs**

**All Atwitter Transcripts**
This smartphone app uses voice-recognition software to instantly transcribe your focus groups or depth interviews into text format, in 140-character increments. These messages then are transmitted securely to your recipient list. With All Atwitter Transcripts, every salient point made by a respondent within the first 140 characters of his or her remarks is instantly turned into insights. Salient points made beyond 140 characters, well...

**Dominator Pause**
Do you have issues with controlling dominators in focus groups? Then Dominator Pause is for you. Simply activate this app at the beginning of each focus group, and then whenever a respondent begins to dominate uncontrollably, you simply point your phone at him and press the # key, and that person will pause in mid-sentence, allowing you to continue an orderly discussion with the rest of the group. You can then un-pause your dominator and be assured that you have control over the rest of the proceedings, with your thumb on the button at all times.

Note: this app works only if your smartphone has the ability to alter time and space, which is not available in all areas.

**EthnoPeep**
EthnoPeep is a little applet that respondents download to their phone before the start of an ethnography, and then EthnoPeep will sit quietly until the project is underway and the respondent interacts with a brand (either the client’s or a competitor’s). At that moment, EthnoPeep springs into action, taking over the respondent’s phone camera and instantly transmitting video and audio to you.

EthnoPeep’s instructions recommend that you have respondents download it a few months in advance of the project, so they forget that it is there. Now, you can throw out your concerns about the Hawthorne Effect (subjects change behavior because they know they are being observed) because respondents don’t remember they are being observed at that moment. Special software turns on only when the respondent talks about (or is in the presence of) pre-identified brands. Listen and watch as respondents interact with your brands, truly in real life.

Caution: EthnoPeep is not recommended for use when researching certain product categories. Do we really need to list them?

**Back Room Snoop**
Back Room Snoop allows focus group moderators to monitor what clients are saying about them behind the mirror. With this app, the moderator leaves a cell phone or notebook computer activated in the back room. The app then surreptitiously monitors the clients’ remarks while the researcher is moderating the group in the next room. Back Room Snoop ignores comments about the research subject matter, the food and other topics, but its special software enables it to know when the clients are talking about the moderator.

If clients say anything negative, the moderator’s second smartphone will vibrate, allowing the moderator to slip out of the interviewing room, poke her head into the back room and scold the client for making such remarks. The clients will be so spooked that they are guaranteed not to make another negative remark about the moderator for the rest of the project.

**Recruit-OMATIC**
Recruit-OMATIC could be the end of recruiting nightmares. Here’s how this simple app works: Recruit-OMATIC maintains a worldwide database of all smartphone users with all possible attributes that could be used as screening criteria.
The only kink to work out is getting smartphone users to fill out the questionnaire that catalogs approximately 428,000 attributes and takes several months to complete.

Voice2Voice 2.0

This is perhaps my favorite of all the apps we brainstormed. Imagine this: you suddenly realize you need to talk to someone who isn’t in the same room or same building. How can you do this? With the new Voice2Voice 2.0, it’s easy. Simply open your phone and enter a series of numbers (and each person you would want to talk to has his own unique set of numbers), and then, within seconds, you actually can be having a voice-to-voice conversation with that person! And Voice2Voice 2.0 can be used for all kinds of needs, not just qualitative research.

Version 1.0 needed a wired connection, but new version 2.0 will let you talk wirelessly. Of all the things your smartphone could do, did you ever imagine it would be able to do that?

As you can see, with just a few new additions to the world of apps, qualitative research could make incredible leaps in capabilities, cost efficiency and client-supplier relations. Who knows? Maybe one day, a program on your smartphone will be able to write the Humor Column all by itself. Now there really ought to be an app for that...

If we can’t laugh at ourselves, who can we laugh at? ☺
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QRCA Announces the First QUALLY Award Winner

The inaugural 2011 Qually has been awarded to Cole & Weber United and The Palmerston Group for its “Project See-Store” exploration of the dynamics of convenience store retailing.

Congratulations to...
QRCA member Daniel Berkel of the Palmerston Group, and to Britt Peterson and her entire Cole & Weber team.

What is the Qually
QRCA established its new Award for Excellence in Qualitative Research – the “Qually” – to recognize and promote excellence in qualitative research. All qualitative researchers and their clients were eligible to submit entries for qualitative research projects with local, national or multinational scope in any field. A panel of respected research industry veterans judged entries on excellence in project design, scope and execution, along with impact on the client’s business objectives. The award-winning project reflects the highest level of execution, as defined by the QRCA Standards of Professionalism, and represents an outstanding example of innovation, insights and results.
EDITORIAL GUIDELINES

Call for Authors: Publishing Opportunities

Editorial content for QRCA VIEWS is managed by an editorial team that includes the editor-in-chief, managing editors, copy editor, contributing editor and the features editors for each of VIEWS’ regular columns such as Qualitative Toolbox and Tech Talk.

VIEWS editors welcome QRCA members and members of the marketing research community to submit article ideas or manuscripts for consideration.

We review each manuscript on an individual basis to ensure that the article conforms to VIEWS’ mission and goals, as well as to the topic mix needed for each issue. Occasionally, we may save a manuscript to use in a future issue. We reserve the right to edit any manuscript or to change the title.

Submissions should be objectively written and supported by case-study examples. Self-serving articles or those that promote a moderator’s or a research company’s expertise will not be published in VIEWS.

Please remember that it takes a good deal of time for our editors to read through all the submissions. We will let you know as quickly as possible whether or not your article has been accepted for publication in QRCA VIEWS.

Submitting a Manuscript

Please send articles via email as an attached Word file to the attention of Monica Zinchiak, at monica@zresearchservices.com.

- The preferred article length is 1,500-2,500 words.
- To make sure that your manuscript can be easily identified and retrieved once it has been downloaded in our “Article Submissions Folder,” your Word document/file attachments should be labeled as follows:

  Brief title.Last name of author.doc

- Please be sure to tag each page of your manuscript with a left header that identifies the article title and author’s last name and a right header with the page number.
- In addition to the title of the article, the front page of your manuscript should include the author’s full name, full company name and address, phone number and email address.
- Please use only simple formats in your Word documents. Avoid using unusual indentations or tabulations as well as outline-style paragraphs with subsets, boxes or other page graphics. When the editing process has been completed, VIEWS’ graphic designers will format your manuscript so that it will be attractive and easy to read.
- Include your full name, company name and mailing address at the bottom of your manuscript. If your article is published, in appreciation of your contribution, we will send you three complimentary copies via U.S. mail.

FAQs about Article Submissions

Will I see my article before it is published in QRCA VIEWS? Not always, as our tight publication schedule may not allow for author review of edited manuscripts.

Will I be paid for the time and effort I put into writing the article? Like most professional association publications, VIEWS does not pay contributors. However, since the magazine is distributed broadly in the research community, you will gain a good deal of visibility as a result of being published in VIEWS.

Can I submit an outline for consideration before I submit the completed article? Yes, you may submit a 50-100 word description of your story idea to the appropriate features editor.

My article was published in another journal or magazine. Can I send it to VIEWS? While ordinarily the preferred solution would be a substantial rewrite, we are willing to consider articles published elsewhere if, in our judgment, they seem both relevant and not likely to have been seen by a significant portion of our own readership. In addition, you must either assure us that you are the copyright holder and/or provide a letter of permission from the previous publication. If VIEWS publishes the article, the prior publication will be credited and cited in a footnote.

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- Footnotes, endnotes or lists of references are not necessary in a trade magazine such as VIEWS.
- Make liberal use of topic subheads to help readers scan your article and follow your main points easily.
- Please direct your queries and/or submit your manuscript to Editor-in-Chief Monica Zinchiak, at monica@zresearchservices.com.

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