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Luminaries: Laurie Tema-Lyn (Editor-in-Chief for VIEWS) talks with Jennifer Bentz (Vice President of Consumer Insight and Strategy for Kraft Foods Group) about how Kraft chooses and uses various qualitative methods, technologies and resources, including QRCs.
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"WE WANT BOLD THINKING AND ASTONISHING DISCLOSURES"

By Laurie Tema-Lyn
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Ringoes, NJ
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It’s a plea from a client, noted in Anita Black’s article “Evolve or Die!”
Ah! Not just gathering information or insights or ideas. Provocative, isn’t it? And it epitomizes an evolving role and exciting opportunity for market researchers!

This article, along with others in this issue of VIEWS, gets into the essence of being a valued qualitative market research consultant. We are more than mere practitioners using tools or techniques to answer client questions. Qualitative research is an art and a craft, engaging in conversation, deep listening and observation. Increasingly, we must be flexible and creative and, as Ms. Black and others suggest, draw upon a wide range of disciplines, including sociology, psychology, anthropology and advanced management thinking.

Also this issue, Layla Shea writes of the value of developing a portfolio of interactive, emotional trigger activities to engage participants in a long-term online study about a sensitive topic, colitis.

Rosalia Barnes and Betsy Leichliter recommend close planning and collaboration with clients from the outset, in order to design research that will lead to effective business decision-making.

Donna Denio works with an iconic child’s toy, Lego® bricks, in a “serious” yet playful way to help uncover surprising truths and see relationships.

And here is a client-side perspective from my interview with Jennifer Bentz of Kraft: “What we need to do is work with consultants in a way that’s not just about data discovery... We want to work with people who are more comfortable with ambiguity and prepared to explore because we’re in this ever-changing world, and it’s not just about sitting back and asking questions anymore.”

Aside from the need to draw upon an expanded portfolio of disciplines, qualitative market researchers are being challenged in other ways, as we work on an increasingly global stage. In this issue of VIEWS, globetrotters consulting in the newly advanced economies of the BRIC countries (Brazil, Russia, India and China) offer practical advice for successfully negotiating in these foreign lands and cultures, as well as activities to enjoy beyond the research.

Articles about successful face-to-face and online approaches to working with diverse markets — such as youth and Latinos — will help the research consultant develop greater empathy and ease with these important research populations.

No, it is certainly not about just asking questions any more! And this broadening role is exciting and perhaps a bit daunting to some qualitative market researchers.

We invite you to read through these articles and the full roster of outstanding articles in this issue. Within these pages, you will find rich food for thought and practical wisdom to help research consultants and research buyers be more prepared and able to bring bold thinking to the business decision-making table.

As usual, we welcome hearing from you!
This year marks the tenth anniversary of QRCA VIEWS in its current magazine format. To celebrate the occasion, it seemed appropriate to look back upon the wisdom and insights shared by past presidents to determine how the publication and QRCA are positioned, compared to 2002.

Presidents’ comments from past issues of VIEWS reveal that QRCA is forward-facing, surfing along the leading edge of innovation, and focused on sustaining the value of qualitative research.

Given the synergies between social media and qualitative research, it seems that the evolution of technology and the ways that we communicate with each other only open new doors for qualitative researchers, as we continue to seek greater understanding of consumers and the way they think and act. The real key for us, as qualitative researchers, will be to understand this new communication environment and how it impacts the work that we do. — Abby Leafe

QRCA members are committed to their profession. They are passionate about maintaining the highest standards and work hard at being the best and most knowledgeable consultants in the industry. — Ricardo Antonio Lopez

These are complex times for our industry and for QRCA, in particular. While it may be argued that our profession is relatively calm, there are movements at work that are forcing us, as qualitative research consultants and as members of QRCA, to rethink our position in the market research industry. — Jeff Walkowski

The mission of the Qualitative Research Consultants Association (QRCA) is to advance the discipline of qualitative research worldwide. As part of that mission, our goal is to provide industry-leading resources that are essential to members and professionals who use research. Our conferences, webcasts, website and VIEWS magazine are all resources for informing quantitative researchers — and research buyers — about the latest approaches to research. We also want to enable consultants to hone their qualitative research skills. Our hope is that through your involvement with QRCA, you are introduced to a variety of methodologies, both the latest innovative approaches as well as the tried-and-true that you can incorporate into your qualitative research toolbox. — Nancy Hardwick

Keeping abreast of the latest trends and taking advantage of ongoing opportunities for building skills enable QRCA members to have the foundation and frameworks necessary to generate powerful insights and strategy recommendations for clients. The more skilled and knowledgeable the researcher, the more likely that clients will gain the valuable information and strategic advice they need to help ensure success. QRCA members place great value on professionalism and take the initiative to stay current with emerging marketing research trends. — Diane Harris

[Using available resources] QRCA members are able to advance their own professionalism and the industry as a whole. We strive to always be versed in the widest array of research techniques to ensure that our clients gain the most meaningful insights possible. — Joel Reish

Anyone who has conducted or observed qualitative research can probably recall a situation where he or she was taken aback by the honesty of a respondent. I have had colleagues tell me how moved they were when hearing the emotional or physical pain a respondent confessed to being in, but had not confided to others. This is a unique situation of trust that we all strive for in building a relationship with our respondents. This is “real” reality… the life-calling of being in qualitative research… an unending curiosity to hear people’s stories and to use those stories for a purpose… The stories we uncover in research can help make better products and improve how companies communicate with their customers. — Chris Kann

Although the industry and available methodologies have changed dramatically, the steadfast professionalism of qualitative research consultants in their quest for the best options ensures that corporate clients benefit from research that is integrated, resilient, creative and effective. As you enjoy this issue, consider how you might apply what you learn from QRCA VIEWS to your marketing opportunities.
Why We Need to Move On as Qualitative Researchers to Stay Relevant in Today’s Business World

By Anita Black
the magnetic collective • London & New York City • anita@themagneticcollective.com

Vinci’s biographer’s description of the Renaissance era could readily be applied to the world today:

“This is a time of rapid transition, of economic boom and bust... It is a period as much of disruption as optimism... Everything is possible, but nothing is certain.”

Governments, industries and individuals are all struggling to wrap their minds around what is happening in our world and how rapidly the status quo keeps shifting — and our industry of market research is as affected as any other.

A significant shift for us is that clients are now doing things for themselves. Through digital technology, and social media specifically, they are easily able to have direct dialogues with their customers and prospects, cutting out the middleman — us! This is particularly true of those who own the networks, such as Facebook and Google, but a whole host of clients, as diverse as Adidas and American Express, are jumping in and doing some really interesting stuff.
ARE YOU HIDING FROM YOUR CUSTOMERS?

STEP OUT FROM BEHIND THE MIRROR AND ENGAGE YOUR CONSUMERS!

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In this ever-more-complex world, it is essential for us to borrow from the best thinking and practices of many and diverse disciplines to help make sense of what is going on around us.

And digital agencies are employing hosts of “community managers” to curate a brand’s social presence in Facebook and Twitter. The bottom line is that we no longer have a monopoly over conversations with consumers.

The reason many of these clients have taken the reins is that more is being asked of them today. Before setting up the magnetic collective last year, we had lots of great conversations with smart clients and agency people, talking about their priorities and challenges. Ultimately, what did they need to understand better to do their jobs effectively?

What was evident from these conversations was that clients are being asked to do more — and more imaginatively. And they are looking for help from wherever they can find it. They want smart minds and fresh thinking to help them meet the marketing challenges their companies are facing. As one client told us:

“We want bold thinking, to work with partners who are forward-thinking and have a point of view. The best people we work with are change agents, challenging us to think differently.”

This desire for change agents, for breakthrough thinking, is a fabulous and exciting development for us all. However, it does mean we need to raise our game, offering more and positioning ourselves differently to ensure we do not get marginalized by other smart professionals willing to step in and be the consumer and cultural specialist.

From “The Consumer Voice” to Cultural Consultant and Business Partner

We need to lift our profession and our value to clients from “the consumer voice” to valuable cultural consultant and business partner. In this ever-more-complex world, it is essential for us to borrow from the best thinking and practices of many and diverse disciplines to help make sense of what is going on around us. Like magpies, we must take things that look interesting and are worth having back to our nest, even if we are not immediately sure why we are doing so!

It is about seeking inspiration in close and faraway places — from the business world, the arts, science, whatever feels right and useful, and, most significantly, will help make sense of the world in which we live. When I came in to qualitative research in the 1980s, I remember being taught that it was all about patterns, looking for differences and similarities within the research findings. This is obviously still true, but great research today is also about thinking quite laterally, even randomly, looking in unusual and different places for inspiration. Our best work should include revelations — or, in the words of Richard Huntington, Director of Strategy at Saatchi & Saatchi London, “astonishing disclosures” — to help businesses do something memorable and different.

To get to these astonishing disclosures, it cannot just be about running a quick online survey or watching people do their weekly shopping. As Da Vinci said, “He who loves practice without theory is like the sailor who boards ship without a rudder and compass and never knows where he may cast.”

Our work needs some serious thinking and planning. What is the context for what people are doing and how they are feeling? What hypotheses and theoretical frameworks might help us maximize our conversations with people and help in our analysis?

Islands of Inspiration

So, what are the things we might take back to our nest? What are the sources of inspiration we can draw on to broaden our minds and sharpen our analysis? The list is clearly endless, but here are a few “islands of inspiration” that we have visited in our work with clients over the last couple of years.

Influence theory

(Read Mark Earl’s Herd for an engaging introduction.) Getting to grips with how people make decisions and the influence of others is a big deal right now. It is critical to the growth of brands in developed markets, and it makes the opportunities in the developing world even greater. Whether your study is all about influence (such as understanding how wealthy empty nesters and retirees invest their money and the influences on their choices) or the focus of your study is not influence but you still need to reflect influence in your sample design (for example, talking with teen girls in small groups vs. on their own), remain conscious that man is not an island, and gauge the many complex influences upon their attitudes and behavior.

Behavioral economics

(Read Thaler & Sunstein’s Nudge is an accessible introduction.) Behavioral economics is hot! It has caught the imagination of governments, the press, the ad world and marketers. It provides valuable insight into how unconscious and non-deliberate decision-making often works, and why people behave as they do.

As marketers, we have spent years focusing on shifting attitudes, in the belief that by doing so we will impact what people do, but contemporary theory challenges the “change attitudes, and you will change behavior” precept. What is interesting is that Karl Marx was challenging the causal relationship between attitudes and behavior 150 years ago! His base-superstructure theory stated that people’s beliefs and values, the “superstructure” of a society, are a prod-
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People clearly do not view a given situation through the same lens, as our lens is shaped by our own histories, culture and priorities. What an adult may see as a comfortable bench, an eager and imaginative child sees as a dragon to ride!
tory marketing and cultural strategy; both are highly relevant to anyone helping clients better connect with their customers and to draw new customers in.

The point is that we are surrounded by fresh, interesting thinking, and we should constantly be drawing on all that is around us to offer up a fresh perspective on our clients’ issues, to help them look at things through a different lens.

Your Construct Is Probably Not the Same as Mine
Our focus at the magnetic collective is on helping global clients develop magnetic ideas that work across the globe. We spend a lot of time travelling to distant places, talking with and observing people in cultures that are not our own. As with domestic research, we seek to borrow and develop models to help simplify the complex and make sense of what we see and hear, but it is unquestionably more complex when trying to get close to people in cultures that are not our own. People across the globe often do not apply the same lens or filter to a given situation, as our own individual lens is shaped by our own histories, culture and priorities to interpret things differently. What an adult may see as a comfortable bench, an eager and imaginative child sees as a dragon to ride!

In conducting global research, we need to consider the constructs that participants are using to make sense of the world, as well as those applied by the local researcher to make sense of what people are saying and doing; both are likely to be very different from the way you filter what you see and hear. Let’s look at a few different countries to illustrate this point.

China
China is profoundly different from Western societies. We need to make a serious intellectual effort to understand China on its own terms, which cannot be through constructs dominant in the West. There is an enduring impact on Chinese culture of Confucius and Tao from centuries and centuries ago, of Marx and Mao more recently, and now Western consumerism, of course.

The application of theories and constructs by local researchers is currently
limited in China, with qualitative research typically being reportage in nature. And many clients are happy with that, as PT Black, Senior Creative Director at Thoughtful Media in Shanghai, explains:

“As a developing nation, China has less of a focus on applying constructs and filters to existing knowledge and more on just keeping up with what's going on in a market where change is rapid and little is still known by many Western marketers. We don’t spend a lot of time exploring the meaning of soap powder in a person’s life; the focus is much simpler — how is the Chinese housewife washing her clothes today? In fact, theory can frighten clients away; they are seeking ‘the truth,’ not theory. That said, there is a lot of theory that does influence the way Chinese people behave, but it’s less about social theory and more about factors such as the influence of the religion Taoism on how people experience food. For instance, the way something looks on the outside mirrors what it does for your body, so milk (white, pure, hydrating) is good for your skin. Knowledge of this is essential in food research, personal care, etc.”

India

In India, as in China, change is constant. There are so many new things to report on that elevating the findings and applying models to help make sense of things is not common.

That said, we did come across a very specific Indian model used by Vox Populi (our partners in India) to help their clients understand brand archetypes. They had tried to use established Western archetypes but found that these archetypes were not universally familiar characters as they are in the West. Vox Populi knew they needed to land on archetypes that were intuitively understood by Indian people. They ultimately developed a model based around the Hindu gods — Rama as Ruler, Shiva as Sage, Vishnu as Magician, etc. — which they have used effectively with clients and consumers.

Japan

The construct so influential in Japan is the importance of context and detail. In his book The Social Animal, David Brooks discusses an experiment where American and Japanese students were asked to view a busy airport scene and then describe what they saw. The American students talked extensively of the people, the central characters in the scene, whereas the Japanese students were more likely to take in the scene as a whole, picking out many more background
Qualitative researchers are uniquely placed to be at the hub of this network, adding a distinct and informed perspective, using modern-day alchemy to blend the talents and contributions of many, to analyze and interpret different sources of information and insight.
Conducting research with kids, tweens and teens has always required a careful balance of understanding of their timeless needs and their timeliest truths. For the current cohort of youth, who are native to digital, reared on reality TV, savvy about self-presentation and fond of Facebook, making sure your research is relevant and your findings are real is a more complicated endeavor than it was just a few years ago.

It might be tempting to assume that the key to conducting great research with youth lies in leveraging technology or abandoning the artifice of traditional focus group facilities. Should you switch your surveys to mobile? Should social networks shape your research designs?

For today’s marketers and researchers, knowing when to innovate and when to rely on time-tested methods might be more challenging than ever.

To ensure that you are taking advantage of the latest opportunities in youth research and remaining true to the basic principles that make kid, tween and teen research great, apply these ten tenets to your next project plan.

#1. Start with Youth.

Taking adult research and simply replacing “mom” with “kid” is a typical trap that the novice youth researcher risks falling into. With new methods most often tested on adult populations, researchers might be tempted to downsize an adult survey or apply an adult online-diary template to youth. Keeping youth in mind from the start and building your studies with them from scratch ensures that you include questions and approaches most relevant to them and that your designs do not deviate from the dictates of their developmental needs.

#2. Do Your Youth Homework.

Learning about youth might seem like the end of your research journey, but we think it is crucial to do your homework before you even begin. Consider what you are asking of your young participants before designing a study that requires 6-year-olds to read and write, or teens to reveal their deepest insecurities in an online chat room. Emotional, psychological, social and even physical differences by age matter when it comes to building an effective research plan.

#3. Be Deliberate about Digital.

Technology — and kids’, tweens’ and teens’ comfort with it — expands the youth researcher’s toolbox many times over. But before using technology, ground yourself in current youth’s tech realities. Find out how many teens have smartphones before making your qual and...
While it is always important to understand the role that your team intends to play in the research, it matters even more with youth. Nothing will silence a sixth grader like showing up with a small army of marketers!

quant studies app-based (only 41% have smartphones, according to the January to June 2012 YouthBeat survey of 944 high schoolers). Before limiting your research universe to tweens who watch TV online, make sure you are not making your recruit impossible and your sample overly selective. And remember: youth live most of their lives in analog! If technology does not help you connect or contact them more effectively or efficiently, opt for an offline solution.

#4. Consider the Right Role of Family.
The question is not new: Should I talk to moms or kids to find the answers to my marketing questions? While a simple answer might seem satisfying (we think it depends), do not assume that only parents or only kids, tweens and teens can give you the answers you need. Consider (or investigate) the role that parents, youth and even siblings and grandparents play in the choice, use and evaluation of your product or service. Giving children and their parents their own safe space to speak to their point of view is usually best, but do not assume that the rules of relationships are the same for every family. And be sure to consider how families operate differently today than in the past.

#5. Pay Attention to the Politics of Place.
The research environment influences the quality of the conversation, regardless of the participants’ age. But for kids, tweens and teens, the politics of place are even more pronounced. Environments that signal “school” or “adult” (i.e., corporate spaces) set expectations for youth as to how they should behave. If you want undivided attention and rational responses from youth, focus group facilities might fit. If you want them to be themselves, on the other hand, consider conducting interviews in spaces that they control, in-person or online. And today, there are in-betweens. Check out the latest facilities and online research platforms, built not only to accommodate youth but also to cater to their every need.

#6. Put Play Back in Its Place.
If “play” and “fun” pop into your mind when you think about research with youth, your instincts are right! Making research an enjoyable and positive experience for kids, tweens and teens is not only more entertaining, but also it is often more effective (getting you more attention, which leads to better dialogue). Infuse fun into your approaches, and engage all the senses in your methods.

Often, our youth strategies are layered and multi-leveled. We should be asking ourselves complex questions about kids, tweens and teens, and we are right in wanting to go beyond the surface to answers that represent the depths of their experience.
But, the hard work of youth researchers is to get to sophisticated solutions through the simplest of methods. Letting youth express their real emotions might mean giving them a choice of the simplest of emoticons (think happy and sad faces, and everything in between!). Finding an uncommon insight means listening carefully, watching and observing, but it also means carefully crafting questions to allow for youth to express their authentic truth in age-appropriate ways.

#8. Attend to Your Audience!
While it is always important to understand the role that your team intends to play in the research, it matters even more with youth. Nothing will silence a sixth grader like showing up with a small army of marketers!

Additionally, consider collecting artifacts for your final presentations before you even head into the field. Hearing kids’, tweens’ and teens’ voices, and seeing what real youth look like, can make your reports more lively, and it can also do the important work of reminding your audience what today’s youth are really like. Think online collages and photo-albums, youth-narrated documentaries and tried-and-true focus group footage. (Consider professional editing to enhance watchability.)

#9. Follow the Rules.
Youth are considered a special group when it comes to research regulations and ethics. They demand and require protection, and your designs should not treat safety as an afterthought. From compliance with the Children’s Online Privacy Protection Act (COPPA) to going to great lengths to protect the privacy of your in-person participants, children’s safety is not new, but the challenges that technology poses to it can be. Stay ahead of the latest in legislation, and partner with an expert who takes the rules of youth research seriously.

#10. Acknowledge that Interpretation Requires Expertise.
It used to be enough to know the basics about youth. Today, though, do not assume that you already know what is meant when a kid calls an idea “weird” (is it weird in a good way or weird in a bad way?). And when two tweens agree, make sure to check that it is not due to disdain for disagreement, which can happen with this segment.

Additional Considerations
With youth culture and technology moving so rapidly, it is more important than ever to have youth experts designing your discussion guides and crafting your surveys. It can be difficult to keep up with the ideas that youth are exposed to, so
conducting research with them — and being able to remain in the moment when they share a story about the latest video game or the most popular band — requires a bit of insider knowledge.

Still unsure what methods work best for you? Try using the following approaches with youth, and consider the following tips on how to make the most of them when conducting research with kids, tweens and teens.

**Ethnography**
- Think outside the home, and catch them on the field, in-store or in the spaces that really matter to them.
- Don’t just visit the space — use it! Youth spaces serve as the best stimuli to keep conversations going. Focus on show more than tell, and spend as much effort observing as listening.
- Make sure mom, dad or an enthusiastic sibling does not steal the show! Do, though, take advantage of their presence to get a full picture of your respondent’s life.

**Online Qualitative**
- Online qual doesn’t have to be impersonal — introduce yourself on video to make kids feel more comfortable opening up to you.
- For tweens and teens, move diary exercises online to help them spend more time on thinking, and less time on writing. Simplify the language and tasks at hand to fit their style (where possible, asking for their private responses and stories before they dive into a group discussion can ease the pressure).
- Use your judgment when choosing the right method for each age group. Little kids have a harder time focusing online, especially sharing their ideas in group discussions, while older youth might be capable of interacting with you and with each other.
- For younger kids, consider involving a parent or guardian to provide typing support; if adults are involved, however, ask them to actively refrain from changing kids’ responses.

**Mobile Qual and App-Based Surveys**
- Use mobile devices to allow young consumers to provide in-the-moment responses and reactions to everything from shelf sets to the fall fashion line. Take advantage of the novelty and the nimbleness that tweens and teens associate with apps and mobile devices in general.
- Plan on using this method to answer specific, simple questions, not necessarily to explore. Ask teens for photo and video uploads with a mix of closed- and open-ended questions. Expect the likelihood of short and sweet mobile responses.
- Mobile video uploading can take a long time. Set expectations to film short clips of one or two minutes or less.
- Keep in mind which youth, and how many of them, actually have mobile and app access within your target. Many of them may have their own phones and mobile devices, while others are still sharing with their parents.

**Social-Network Mining/Twitter Slicing**
- These newest approaches to stealth discovery can provide excellent snapshots into the way that youth conversations go — about topics of interest to them, mostly, and sometimes about specific brands.
- As with any method that generates a large volume of data, make sure you are not short-changing the significant time necessary for analysis.

**Focus Groups**
- Couple this classic with lots of stimuli to evoke and inspire more interesting conversations.
- Drawing activities and role-play games can allow youth to share their stories in new and unexpected ways.
- Choose your facility wisely — make sure kid-friendliness is a primary criterion for facility choice. Many offer beanbag chairs, comfy sofas and brightly colored walls that feel less like a conference room and more like a space to share, play and even dream. Think about alternative venues like coffee shops or restaurants (but make sure the space is not so novel as to distract from the conversation you need to have).
- Be aware of what it feels like to walk into a big building, with a big garage and a big corporate room, and make your young participants feel like this experience is really designed to fit who they are.

**Online Surveys**
- Take advantage of the latest tools that help convert simple questions into engaging games.
- Dynamic questions and survey visuals can be overwhelming and can distract from getting answers. Make sure the magic serves your objectives and is not only for entertainment.
- Remember that kids’ ability to read and type has not always caught up to their thinking — make sure the task at hand is appropriate to the age group that you are researching.

**Final Thoughts**
So, the next time you plan to pursue a youth research agenda, try breaking away from your normal research routine. Challenge yourself to mix things up, and you will uncover richer, more meaningful insights into the youth market… and you will have more fun doing it.

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Jennifer Bentz has been with Kraft Foods since 1999, holding a variety of positions in Kraft’s Corporate Group, as well as working on a number of businesses across Kraft Foods. One day this past summer, she graciously allowed me to interview her about qualitative research at Kraft Foods, and her observations and perspectives are particularly insightful for all of us.

Laurie: Hello, Jennifer! It’s nice to finally meet you by phone. Would you please introduce yourself to our readers?

Jennifer: I am currently the Vice President of Consumer Insight and Strategy for Kraft Foods Group. I also lead a specific business unit, which is great because it keeps me very close to the business and some of the key issues that we’re focused against here.

From a functional perspective for Consumer Insight and Strategy, our focus is on driving consumer-led strategy, innovation and execution. Collaboration between the leaders of each of the different business units — making sure that we are talking and working well together — is critical to our success.

Laurie: Can you tell me a little bit about Kraft Foods’ process of engaging in qualitative research? Does it start with a marketing request? Or can it start any place in the business?
Jennifer: It can certainly start any place, but here at Kraft, we always begin with our consumer. That’s really the most important thing. We’re listening, we’re watching, we’re learning. It’s important to understand their joys, their challenges.

Beyond even just the behavior and the attitudes, though, for us it’s about how we can capture their belief system because that’s really what will motivate our consumers. So, regardless of where it starts — whether it is R&D, marketing or whatever the issue — we must start with the consumer.

We feel that if we are addressing consumers’ beliefs and knowing them in depth, understanding their lives, understanding the way that our categories play within daily life and with their families, then we will be able to effectively drive our business.

Starting with the consumer is at the center of everything we do — it is embedded in our culture, and it is a core foundation for us at Kraft. It’s important to all of Kraft’s senior management, and I don’t anticipate that changing.

Laurie: Are there particular types of qualitative approaches that you tend to use most often?

Jennifer: We certainly use the traditional qualitative methodologies — focus groups, in-home ethnographies and shop-alongs, all that kind of traditional qualitative. But we are also always on the lookout for innovative ways to stay at the forefront of both consumer and shopper.

We are trying to leverage technology as much as we possibly can. It helps us from a speed perspective, and it helps us get more clarity of the insights. We’re looking at things like online communities, blogs and video diaries. We really want to make sure we’re harnessing digital media, social networking. We focus a lot more on listening, observing, building relationships.

We are always looking to see what’s new, what’s out there and how we can keep up. The Consumer Relations organization also reports to me, and with listening being a key cornerstone for us, it’s not just the toll-free calls that we get in; we’re also keeping track through social media of the conversations that are happening out there.

Laurie: One of the social-media platforms that seems to be catching the attention of many marketers is Pinterest. Is that one also on your short list?

Jennifer: Absolutely. It’s interesting because I think we’re asking ourselves that question here all the time. We’re trying to identify if it is a fad or if it’s kind of a gateway into new ways for us to connect with our consumers, but we’re trying to stay on top of all of those changes.

Laurie: With this huge repertoire of platforms and research modalities available, are there some that you consider the first lines to explore, or do you look at every research objective as one that requires fresh thought to identify the best way to get the insights you’re looking for?

Jennifer: I would say it’s really about a fresh thought. What do we do first and foremost is say, “What is the objective that we’re trying to understand?” What are we trying to learn? And is that something where we can tap into social media to understand what consumers are talking about? Is it something where we want to ask a few questions in a focus group? Do we want to observe consumers shopping? Is it something that we want to do via a blog? Will we tap into our online communities where we spend a lot of time? Do we want to tap into consumer panels that we often use?

It really depends on the question, but we certainly have quite a number of ways to connect with our consumers.

Laurie: With all of these opportunities and, obviously, a slew of different kinds of resources that can provide services, are there some qualities or some things that you look for in identifying the right qualitative research consultant for you?

Jennifer: That’s a really interesting question because I think that our whole industry right now is at a turning point. I think that we are moving away from being marketing researchers, and we’re really moving more towards this whole idea of consumer understanding and trying to drive consumer and shopper intuition, at least here within our organization.

What we need to do is work with consultants in a way that’s not just about data discovery, but it’s more around synthesis. We want to work with people who are more comfortable with ambiguity and prepared to explore because we’re in this ever-changing world, and it’s not just about sitting back and asking questions anymore.

Laurie: Please say a little bit more about this notion of people who are comfortable with ambiguity.

Jennifer: I think that we’re at a point now where it’s not just about throwing out questions and listening for answers. We often say here that you can’t “find an insight.” And so it’s more around how do you derive it? And how comfortable are you, knowing that you’re walking into a situation where it’s not just about finding an observation and asking a question. Instead, it’s about sitting back and not knowing necessarily where the conversation might take you, but it may lead into an area that will be extremely fruitful for the development of the brand.

Laurie: What you are describing is why I personally love ethnographic research! Okay, so this is an ability to really observe, to not be boxed in, to tolerate ambiguity. Are there any other characteristics that you think are important in your research partners?

Jennifer: I think it’s about the ability to take a step back, to really listen, to let our consumers guide the conversation but keep it within the guardrails of the impacts that it can have for our businesses. It’s someone who will be thinking strategically and can take the observations and apply them back to the business.

Laurie: Would you share a small tidbit or story about a qualitative research event that you’ve been part of that particularly surprised you or gave some exciting or unexpected result?

Jennifer: I’ll tell you about a project where we found an opportunity that we weren’t expecting as it related to meal preparations.

We’ve been spending a lot of time in qualitative research talking to moms about the world of convenience, an area
that we certainly know a whole lot about. While we found that moms did want to be able to use shortcut meals and different types of kits so that they could spend more time with their families, we heard a lot about those meals not tasting so good and moms not feeling very good about what was available today. They just didn’t feel good about pulling things out of the freezer and microwaving the meals. It was a little surprising in the world of convenience, to hear this whole idea of them wanting them to have more hands-on experience with meal preparation and it coming from their heart. This insight led us to an idea to leverage the equity within our Velveeta brand and come out with a product called Velveeta Cheesy Skillets.

It’s a solution for the type of busy moms who are looking for shortcuts, but who don’t want to compromise on taste. The product has far exceeded our expectations. We’ve been using social media to surround it and talk to the consumers. At each point of engagement we have with this brand, we’ve found this powerful connection that came from the insight that we got from that qualitative.

Laurie: Great example! Jennifer, how do you keep up with the trends and the technologies in qualitative research, and are there any specific places or go-to magazines, conferences or journals and such that you refer to regularly?

Jennifer: Yes, staying at the forefront of both consumer and shopper insights is very important to me, and we are always looking for new platforms and technologies.

One of the things that we do here, at least on a quarterly basis, is host a supplier innovation day where we have our key partners come in and talk to us about new techniques, new technologies and new thoughts that they have in the industry, and we bring in the leaders across the function to spend time with these folks and to learn from them.

I also have my leadership team spend time, on a monthly basis, sharing learnings from the groups that we’re involved in with each other. Collaboration is so critically important, not only between our functional group but also with our key partners. That’s how we’re staying abreast of what’s new and what’s out there.

Laurie: That’s good to hear. And that collaboration and cross learning is not the case in many companies.

Jennifer: It’s just so important to learn from each other. It creates a lot of efficiency within our organization, but I think it’s also helpful for each of us because building that relationship here in Kraft helps us stay connected and feel better about our own jobs.
Laurie: We talked a bit about different kinds of research platforms, but are there some particular technologies that you find yourself being especially impressed with or fascinated with?

Jennifer: One of the ones, from a qualitative perspective, that’s really interesting to me is the whole idea of being able to mine qualitative research in a way that we’ve been doing with quantitative research for years.

I’ve been hearing a lot about this ability to search different video and audio files in the way that we’ve been able to search quantitative data tables. And I think it’s something that could be really cool for us. And I know, in the Spring 2012 issue of VIEWS, you talked a little bit about this whole idea of the video reports and “seeing is believing.”

I think that’s so important, being able to not just tell somebody what the insight is but also being able to showcase it. We have tapes that sit in drawers for years, and while they’re interesting to us as researchers as we write reports, we don’t leverage the full value of them.

The big idea for me is getting emotional engagement with consumers. We know decisions aren’t always made from a logic standpoint or based on the functional attributes of a product. Getting into the emotional impact that certain cues, whether they’re on a package or in the advertising, have for consumers, that’s where I think we could really go a far way to drive our businesses and understand our consumers in a new and different way.

Another article in VIEWS that I was intrigued with was around the idea of combining market research with competitive intelligence (Editor’s note — Spring 2012). I think that’s so important because, with Consumer Insight and Strategy, we spend a lot of time understanding what’s going on with our competitors but also what’s going on with some of our broader categories and deciding what we need to do from a research perspective to better understand that.

An example is what we’re doing now with an opportunity that we identified in peanut butter. We just launched Planters Peanut Butter over the last year, and the peanut butter category (from a
competitive intelligence perspective) has been growing like crazy! It’s been growing at 5% to 6% a year, which we don’t see in a lot of our consumer packaged-goods categories, and interestingly, it’s being marketed to families. What we found was that two-thirds of peanut butter consumption in the U.S. is actually consumed by adults, and they’re seeing it as a nutritious snack option.

It was a powerful way to take our competitive intelligence and say, “What does that mean for us?” We started with research to help identify ways to move the brand forward. And the research helped us identify an opportunity for a new product we’re launching, which is called **Planters Nut-Rition Energy Mix**. It’s a breakthrough innovation for adults looking for more of a grown-up peanut butter, and it is taking us out of the kid-oriented category into something that is a lot more wholesome and adult focused.

**Laurie:** If you had that proverbial crystal ball on your desk and you could see three to five years into the future, what do you think might be coming in to have an impact on the qualitative research industry?

**Jennifer:** I don’t know that the research industry has really kept pace with technology, the technology that our consumers are using every day. If we want to begin with our consumers, then we really have to understand them and how they’re operating in the real world in real time.

I think we as an industry need to be spending a lot less time behind the glass in the traditional focus group, a lot more time watching consumers in virtual environments, more time with social media. I think more time listening to them, less time asking them questions.

**Laurie:** Is there anything that I haven’t asked you that you wish I had asked?

**Jennifer:** You know, for me it comes back to where we started, which was for us to really drive our businesses in a compelling way, we must always begin with our consumers — we have to listen to them, we have to understand them, and we have to be able to capture their belief systems beyond their attitudes and behaviors. I think that if we all keep that as our focus, we will be a lot more successful.

**Laurie:** Well said. It’s been a pleasure.

**Jennifer:** Thank you.
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It has been said that a picture is worth a thousand words. If this is true, a three-dimensional model provides as much information as at least three thousand words.

And if the model is brightly colored, easy to construct and reminds the builder of happier, less stressful times when she was free to create a world of her own design, a world where she is the star of her own story, then getting authentic insights becomes as easy as pie.

Lego® Serious Play® (LSP) is a flexible communication and research tool that almost always produces new insights and surprising results, and Lego has recently made it open source, so it is available to any qualitative researcher. Just as the name suggests, the process involves Lego bricks.

The bricks come in a broad variety of shapes and sizes beyond the standard 2 by 2 and 2 by 4 (numbers relate to number of nubs) square and rectangular “brick” shapes. Bricks can be transparent sky-blue domes (my personal favorite), Kelly-green squat evergreen tree-like pieces, a wall section with embedded movable doorways or windows, an elephant, cat, monkey or the miniature-figure collection (called minifig), which includes sets of movable legs, torsos, heads, hair styles and a variety of hats (fire helmet, hard-hat, baseball cap, crown) sized to fit Lego heads. Heads come in both male and female versions.

And there are cobwebs made of string, pink and lavender castles and gold money that intentionally does not stick to other bricks. One brick can be the basis for an entire story.

Lego Serious Play was invented by Johan Roos and Victor Bart, two business professors from Switzerland’s Institute for Management Development, and Kjeld Kristiansen, leader of The Lego Group. Roos and Bart sought to create a methodology that would help teams of business executives build and refine business strategies. The Lego bricks proved to be a robust tool that executives could use to model operations, opportunities and threats to their organization (such as a stock-market crash or a positive story on the front page of the Wall Street Journal).

Why It Works
As any qualitative researcher who uses construction-oriented projectives knows, when people build, they go directly from an internal picture or sense similar to a subconscious dream state to a three-dimensional model, bypassing the need to talk it out or think it through on paper. The visual model focuses the discussion.

In most instances, the words that people use to describe their models are secondary, and shy people are more at ease when they have a visual reference point.

We use both hands when we build, so model-building engages both sides of the brain. The right hand accesses the left brain, and the left hand accesses the right brain. The process of building integrates left-brain knowledge with right-brain wisdom. Building with the hands stimulates areas of the brain that cannot be accessed any other way.

How It Works
The Lego Serious Play methodology takes advantage of our hand-brain connection.
Its powerful, highly structured process evokes information that is much deeper and richer than just playing with Lego.

The process is guided by a set of ground rules referred to as Etiquette. The LSP facilitator poses a series of artfully designed Challenges. Each challenge begins with the word “Build…” The level of reflection or candor required to respond to the flow of building challenges deepens gradually.

The first challenge is almost always “Build a tower.” Every person then tells a story about her or his model. This warm-up challenge gets people familiar with using the bricks and with the process flow where a facilitator gives a challenge, everyone builds an individual model, and everyone tells a story. In addition, the facilitator can support reflection that allows participants to see that even though everyone started with the exact same bag of bricks, every model is different and interesting. Deeper challenges might be: “Build your ideal client, computer experience, spot remover or laundry detergent.”

It is important that building challenges be provocative enough to inspire images and stories, while being neutral enough to separate any preconceived agendas of the workshop sponsor, designer or facilitator from the creative response. The
Etiquette requires that everyone in the room build (no observers; we are all in this together) and that everyone tell a story about what he or she built.

The process always begins with people building individual models in response to the same challenge. After two to three rounds of individual challenges, depending on the program objectives, participants might arrange their individual models into a shared landscape and develop a story that integrates all the individual models, or they might combine their works to form a single model. If models are combined, every participant has to personally assure the facilitator that her or his key ideas are included in the consolidated model.

**Case Study — Creating team synergy and harvesting collective intelligence**

I was a participant in my first workshop. A non-profit organization that I had founded was an early case study for the LSP process. Our goal in working with the process was to help my team clarify our roles, to understand our own and each other’s strengths, and to align individual efforts with our team goals. Our facilitator first asked us to build a model of ourselves and the qualities that we each brought to the team and to our work. I built a house, with movable windows and door, filled with gold coins and surrounded by grass and a vegetable garden. On top of the house, I put a female head with reddish brown hair (my hair color at the time). We all gained deeper insight into ourselves and how we saw each other.

My friend Jeanne built herself as a figure sitting in front of a grand piano. The top of the piano was propped up with a tiny strut. (And Jeanne had poked fun at her Lego building expertise!) In her story, Jeanne described that what attracted her to the non-profit organization we had created together was an opportunity to bring creativity to her work. She explained that before law school and business school, she had been a concert pianist, and it was this creativity that she wanted to use in her work. I had known Jeanne for ten years and knew her only as an attorney. I never knew she had been a concert pianist.

Later in the workshop, we all arranged our individual identity models into a structure that explained how we related to one another. Each model told a story, using symbols and metaphors. My house-with-a-head-on-top became the “heart” of the landscape. Several models symbolically “held hands” with my model. Two models, though, were so close to the edge of the table they almost fell on the floor. The people who built the edge models had joined for business-networking reasons and did not feel aligned with our mission. They admitted that they never would have told me this to my face, but when they could not place their avatar near me or near the hub of our organization, they were able to visually articulate their concerns and discomfort.

**Case Study — Creating understanding across generations and work backgrounds**

You can use this method to create interpersonal insights that surprise participants across generations or hierarchies. I once facilitated an LSP session for the Leadership Forum of Silver Bay, which is an annual conference dedicated to purpose-driven leadership. For 90 years, the Leadership Forum has been at the forefront of human issues in industrialized America. The program is held at a
YMCA Facility in Lake George, which has a number of recreational amenities, so attendees bring their entire family, and family members were invited to participate in this workshop.

During our session, participants were asked to “Build what leadership means to you, personally.” The question was intentionally open ended and inspired people to build leadership in action (for example, one participant represented this concept via a mini figure conducting an orchestra). After the program, men in their 60s and 70s came up to me and told me story after story of how they were surprised by and proud of the wisdom and insight voiced by their wives and children.

Case Study — Representing diversity within an organization

Connections can be clearly expressed with this approach. Once threats, opportunities or elements of an organization have been modeled and arranged in a landscape, program participants describe how individual elements relate to each other by adding a variety of connection pieces to the model. The connection pieces can be plastic chains, tubes of various diameters, straight pieces that link together in a zigzag structure, pieces of string, pieces of elastic, expansion ladders or even a cannon. Is the connection strong, weak, flexible? Does it break easily? All of these qualities can be clearly expressed in the LSP system of communication and research tools.

In a workshop for a professional association that was launching a yearlong diversity program, I asked participants to “Build what diversity means to you, personally.” On the plane ride home, I transcribed the note cards that recorded the stories people had told their tablemates about their models. The recorded stories were close to poetry and moved me to tears. “All colors make a stable structure. Take one color out, and the structure is unstable.” Or another model story, “Different, unique individual pieces come together to make a more interesting and beautiful whole.” And another, “My vision of diversity was to take pieces of all shapes and colors and make them come together. I found that the pieces didn’t always work together as I had
The process can make it easier to describe feelings and thoughts that are difficult to put into words.

planned, so I had to compensate in some areas to make everything balance.”

Adding Lego Serious Play to Your Toolbox

Two online communities were started by groups of LSP facilitators — Serious Play Pro (http://seriousplaypro.com/) and Strategic Play Room (http://strategicplayroom.ning.com/). You can join either of these communities and pose questions about program design, training or finding a facilitator.

If you would like to try the process with your own work group or client, order Lego Serious Play Window Bag (the smallest brick assortment) kits online at the LSP Web site. You will need one Window Bag for each participant.

Incorporating this skill set into your toolbox is straightforward. The specific workshop design will vary based on your meeting objectives. The basic approach is to start by asking everyone in the room to build a tower. Then ask them to build the biggest challenge they faced today or this week. Then you can get down serious business and ask them to build something that is germane to the meeting objectives. For example, you can ask participants to “build what makes you feel valued,” “build your biggest challenge taking care of your family” or “build your ideal product experience.”

Lego Serious Play is another creative technique that QRCs can use to provide access to authentic expression when exploring topics that are difficult or uncomfortable to discuss. If you have genuine interest in learning more about the process, I strongly recommend engaging the expertise of a trained and experienced facilitator to work with you to co-lead a program, or consider participating in a four-day training yourself.

ETIQUETTE HIGHLIGHTS

1. Treat each other with respect.

2. The process ALWAYS begins with the participants building individual models.

3. Direct all questions/comments to the model, not the model builder. (Questions might sound like, “What does this yellow brick with the eye mean?” or “Show me the area in your model that shows this separation.”)
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Recently, my online qualitative practice has been chock full of bulletin-board projects with relatively long engagements. A number of them have lasted ten days and required extensive daily or nearly daily participation from my respondents. Since the longest project I had previously moderated was five days, the first thought of a ten-day project for the Crohn’s and Colitis Foundation of Canada was a bit daunting, to say the least. How could I keep these participants engaged for the duration and keep drop-off rates low?

By Layla Shea
Upwords Marketing Solutions ▪ Victoria, BC, Canada ▪ laylashea@upwords.ca

While client objectives are typically at the forefront of my mind when designing an activity guide, this ten-day project highlighted the need for an additional objective around participant engagement. The following suggestions for how to create and maintain participant engagement come out of this study.

I started with what I already knew: ensure strong recruiting, and incentivize well. My heart raced, though, when I realized that both recruiting and budget would be a challenge for this project. We were not able to recruit from my typical trusted panels, and because my client was a not-for-profit organization, we simply could not afford to pay the typical incentives of at least $25 per day of activity. The most we could afford was $50 in total!

Let me take a step back. The Crohn’s and Colitis Foundation of Canada (CCFC) needed research to help them understand what it was like to live with inflammatory bowel disease (IBD). In addition, the foundation wanted to under-
stand what the information needs were at various stages of the disease and whether the information and resources that the foundation provided were meeting patients’ needs.

Low incidences in the general population meant we could not recruit from a traditional panel. Instead, we used a list that the CCFC had generated at a recent event. The CCFC sent out a mass email (in line with all privacy legislation, of course), asking for interest in the qualitative project. Our recruiter then selected appropriate candidates from that list. We got over that first hurdle.

As CCFC had no flexibility in the budget for additional incentives, I focused on other ways to maintain engagement:

- Set expectations about time and level of involvement with participants, and stick to them.
- Establish open connections with participants early.
- Model the behavior you want to see — be open and vulnerable yourself, and encourage participants to do the same.

- Make it fun to participate.
- Encourage and give praise for group interaction.
- Help respondents feel that their contributions are valuable and will make a difference.

**Set Expectations**
Within the screener, be clear about the length of time that will be required each day and the types of activities that participants will be asked to complete. We shared with respondents the topic, the purpose of the research and (most critical) the impact that their feedback would have on the overall project.

**Establish Connections Early**
From the moment your participants are confirmed into the study, send them an email that welcomes them to the study, explains the process and major objectives of the project, and outlines what they can expect from you and vice versa. For the CCFC study, I explained that some of the questions might make them
Another helpful trick is to start each day with a customized note to the participants, telling them how great they did with a particular activity. Depending on the platform you are using, this might be an email or an actual notice on the board.

Keeping Them Engaged Over the Long Haul  CONTINUED

uncomfortable and, if they ever felt like something was too personal, they could always opt out.

Open Yourself Up
My typical moderating style is one in which I am open and “myself” with my participants. I never use a pseudonym, and I always treat them as if we were getting to know each other. In this study, the topics would be very sensitive and embarrassing for many (we would be talking a lot about poop over the ten days). I needed them to trust and like me for them to be open in return.

In my opening email, I gave my phone number in case they had questions and wanted to speak to a real person at any point before or during the research. Then, in my intro on the discussion board, I shared more details about me so they could see I was a real person and not a computer program. Video can add a personal touch, but I have not found the addition of a video introduction to make a difference in engagement levels.

How much to share can be a fine line. When I connect through personal experiences with participants early on (taking care not to lead in a way that biases their answers), they are more likely to stick with the study and remain engaged. In this instance, I shared my personal connection to the disease (my father-in-law suffered from it) and apologized in advance for any ignorance on my part if
the way I asked a question or responded to them seemed ill informed.

**Make It Fun**

While most of us try to make a project enjoyable for participants, it was especially important to this project since we had very little monetary incentive to keep them coming back over a ten-day period. I designed an activity guide to push the participants to engage with each other, while also creating space for introspection. To help prevent boredom, I built variety into their daily tasks.

The following activities worked particularly well, as measured by high rates of participation, depth of information gathered and positive feedback:

- **Good day/bad day poll.** Each day started with participants answering whether it was a good day or bad and sharing their reasons. Beginning with a poll helped them be aware of their own state of mind and to connect with each other. They read and commented on daily events that were happening to each other; in short, the participants bonded quickly and supported each other.

- **Tell a Story** about the moment of diagnosis. Participants shared their “story,” including who told them the news, how it was told, how they felt and what information they received.

- **Picture Analogies.** Participants chose and described an image to depict their feelings before diagnosis, and another for after diagnosis.

- **Your 2 Cents.** Participants wrote a letter with advice to an imaginary friend who had just been diagnosed with IBD.

- **Let’s Vent.** A forum was set up for them to let loose and rant about all the things that really upset them about living with the disease. They were encouraged to interact with each other and to offer up their stories and examples.

- **Show and Tell.** Here I instructed participants to post pictures of items that help them manage their life with the disease.

- **Open Forum.** In some studies where participants are naturally interacting because of the topic, open up a section of the discussion where participants have control, and watch the insights
Keeping Them Engaged Over the Long Haul  CONTINUED

roll in. Let participants ask the questions and respond to whomever they wish. You and your client can be “flies on the wall,” eavesdropping on what is on their minds.

- **Daily Wrap-Up.** At the end of each day, tell them a bit about what they can expect for the next day. Of course, make it sound exciting or important.

Encourage and Give Praise for Interactions

Encourage interaction right from the first post. I recently discovered an effective way to get respondents to engage from the beginning. After they have shared a few personal tidbits in their introductory posts, ask them to find at least one person in the group with whom they have something in common. Right from the start, you will see your participants building connections with others, sharing details about themselves and getting used to interacting.

Another helpful trick is to start each day with a customized note (depending on the platform you are using, this might be an email or an actual notice on the board) to the participants, telling them how great they did with a particular activity. On the second day of the discussion, comment on those who are building on others’ posts, to encourage further interaction.

Let Them Know that Their Contributions Are Valuable

Daily, I reminded my Crohn’s and Colitis Foundation participants that their contributions were helpful. These participants felt they were getting a chance to have their voice heard and that their voices might actually make a difference to others.

At the end of the day, my first foray into long engagements with participants worked out well. A few did drop off, but their reasons were not related to the engagement itself. Asking for feedback will help you fine-tune what does and does not work in long (and short) engagements. Here’s an example of the kind of feedback I got:

Thank you, Layla, for your genuine participation in this study. I felt you were reading, understanding, relating and giving excellent feedback. I got so much out of it. It was wonderful to feel the honesty and sharing from the heart. I have felt so connected over the past 10 days. It has not felt like a chore to get to the tasks. It’s been an honor to be a part of everyone else’s journey... it’s been such a super experience.

While designed to keep participants engaged in studies lasting for ten or more days, these techniques can also work well for those “quick fling” projects.
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COLLEAGUES and FRIENDS

without Prejudice
By Peter Lovett
Consumer Profile Group  ▪  Oxfordshire, U.K.  ▪  Peter@profile-group.com

Pat Sabena
Sabena Qualitative Research  ▪  Fairfield, CT, U.S.  ▪  psabena@qual.com

**Peter:*** This is a story of friendship. It is founded on affection, shared interests and shared history. As in all long relationships, however, there is the risk that things we hold true about our friends may no longer be true and, perhaps, were never true. We construct narratives that suit our own purposes and, ultimately, these become prejudices that bias our perspective and lead us to ignore contradictory information.

**Peter and Pat:** It seems undeniable that the relationship between qualitative researchers in the U.S. and the U.K. is colored by several layers of prejudice that underpin the occasional criticisms we make of each other. It seems timely to explore these and see what basis they may have in reality. We are reviewing these from the point of view of two friends with a long history in the profession of qualitative research. We have made the effort to keep in touch with the preoccupations and concerns of researchers in both countries, and we have experience working in both countries. The following polemic is not intended to reinforce the prejudices we observe, but rather to examine them to see if they have basis in current reality.

### THE EVOLVING QUALITATIVE HISTORY

#### U.K. Prejudice

**Peter:** In my 30-odd years in this work, the consistent gospel has been that Ernest Dichter was the “Motivational Research” daddy, based in New York, and that his “son and heir” was Bill Schlackman, who brought the discipline to the U.K. The majority of us working in the industry now are, therefore, his direct descendants. (Note how we tend to ignore the contributions of Lazarsfeld and Merton.) A widely held belief among my colleagues has been that European research, particularly in the U.K., is closer to the founding principles of what is now qualitative research: an industry steeped in creativity, curiosity and intellectual rigour.

By contrast, the myth surrounding the evolution of qualitative research in the U.S. is that after the critiques of the “depth boys” by Vance Packard in his mid-’50s book, *The Hidden Persuaders*, qualitative came under attack in the States in the early 1960s as being too unreliable to be useful. As a result, the business went into decline for a number of years, ultimately rescued by the invention of the focus group, a far more structured (and limited) approach that placed emphasis on reportage rather than interpretation. (It is interesting that Wikipedia reports the term “focus group” as first used by Dichter and not at all pejoratively.)

From this point on, so the story goes, the paths of qualitative research in the U.S. and U.K. diverged. In the U.K., we supposedly developed a humanistic approach that was entirely respondent led and exploratory in nature, emphasizing creative interpretation by the researcher. In the U.S., responding to the newly mistrustful and controlling client, qualitative research was “reinvented” to meet this new client need. Researchers became “moderators,” working in front of mirrors, required to give great “group” (often many per day), with far less focus on back-end analysis and interpretation.

#### U.S. Prejudice

**Pat:** It is true that Dr. Dichter was the “Motivational Research” daddy. We in the U.S., however, credit “focused” groups to the Columbia University Bureau of Applied Social Research’s associate director, Robert K. Merton, Ph.D. In 1941, Dr. Merton conducted the first “focused interview” at the behest of his long-time colleague, Paul Lazarsfeld. From this impromptu beginning emerged a manual of interviewing precepts and guidelines, published later as *The Focused Interview* (Free Press, 1956). Dr. Merton was fêted at a dinner event held by QRCA in 1991 at the Golden Anniversary of the Focus Group. At that event, Dr. Merton spoke at length. As he admitted, “If the marketplace had not been there, the focus group would not have been there; but to confine it to the marketing sphere is to undercut its potentialities.”

The marketplace was there, as was I, in 1963 when many of the leading advertising agencies in New York City opened qualitative research departments. To think qualitative research languished in the U.S. in the 1960s is not to have been there. Market research departments in ad agencies in those years were remarkably large (a high of 72 at Foote, Cone & Belding in the New York office alone), and qualitative research was booming. Some fine advertising came out of those years as a result of qualitative researchers working hand-in-hand with creative teams.

Ultimately in the early ’70s, as U.S. ad agencies downsized dramatically in a tighter economy, their clients began to sponsor research independently for objectives far beyond advertising development in order to uncover consumer attitudes and unmet needs, corporate imagery, product-line potential, etc. In my experience, the quality of qualitative improved significantly when it moved from political pressures on the ad agencies to the deep insights wanted by corporate clients about their consumers. Reportage only supports actionable interpretation and recommendations.

**Peter:** It seems to some U.K. qualitative researchers that the perceived U.S. model of qualitative research has indeed begun to dominate the industry globally, resulting in a yearning for a “golden past,” one that may never have existed. In particular, some aspects of our current working practices come in for criticism.
Viewing Facilities

Peter: The first viewing facilities in the U.K. were based inside U.S. ad agencies. In the '70s, Masius had its goldfish bowl (known to some as the shark tank), and JWT had a converted meeting room for in-house groups at its Berkeley Square offices in London. I believe the first independent viewing facility in London (The Research House) opened during the '80s as a result of its founders having worked in the States. At the time, most fieldwork in the U.K. was held in recruiters’ slightly dodgy front rooms, which seemed to work very well for the generally uninformed respondents that we would come across in those days.

There was a time when the U.S.-style facility appeared to differ vastly from the U.K.-style room. American facilities were, it seemed, largely based in impersonal office buildings and looked more like large corporate boardrooms in which participants sat around huge tables. In the U.K., an attempt was made to recreate the living-room conditions that we were used to, as well as to plant more emphasis on the comfort of the respondent than on the client.

In my own opinion, shared by other U.K. researchers, this criticism no longer has any validity. Viewing facilities on both sides of the Atlantic have become similar. As Roddy Glen (an eminent U.K. researcher) says: “I don’t think respondents are intimidated by ‘boardroom’ setups nowadays. They may have been when I started in the '70s, but they have seen too many episodes of ‘Mad Men’ now, and much besides. People like environments that indicate that they are engaging in an important and valued activity.”

Pat: Mirrored facilities have long been preferred in the U.S. because they provide a safe and professional working environment for respondents, qualitative practitioners and clients alike. We were happy to let go of clients listening in the kitchen or through scrim in the early '60s of qualitative research on the road. While some viewing facilities also have living-room set-ups, many of us prefer the benefit of a table for stimuli examination or projective exercises. Most facilities have at least one conference room where the table breaks down to accommodate the coziness of mini groups or the intimacy of a one-on-one interview. A table allows tall (and sometimes wide) Americans the discretion of being seated comfortably with legs akimbo under the table.

Another factor is the very large geographic area covered by the States. Most studies involve at least two and even three markets, and flight distances between cities are long. Comfortable back rooms provide a place for clients to relax and chat before the next interview, space for flipcharts for clients to put up sticky notes about their discoveries during active listening, and ledges and ports for plugging in today’s ubiquitous devices.

Recruitment

Peter: Many U.K. researchers perceive the U.S. system of putting recruiting in the hands of local viewing facilities as a recipe for disaster. The control resides with the facility owner who, rather than risk losing a project, is likely to be prepared to bend the rules to get the people there. As one colleague put it, “It seems like facilities are doing the recruitment because they have invested in panels (groupies) to come along. Rather mechanistic: you supply a screener, they apply it like a quant, people turn up to a group, questions are asked and answered, and people are paid and leave. It is all a little clinical.”

The “clinical” American approach may also be accused of having an impact on incentives. We have had examples cited to us of huge “fees” being paid to participants. Not, you may say, unusual, but it demonstrates the “professionalism” that runs through the U.S. and which, for some of us in the U.K., challenges our traditional love of the “amateur enthusiast.”

On the other hand, the traditional U.K. system of using preferred, tried and trusted recruiters in a cottage industry is thought to allow the agency to develop a close relationship with the interviewer, ensuring that the process is personal and tailored to the needs of the project.

In all honesty, there is no perfect solution to this issue. Cynicism about the process and the opportunity to earn extra wages in the form of incentives has created a situation where collusion abounds. Roddy Glen again: “When the U.K. approach works properly, it is excellent. Perhaps it delivers little additional to the ‘American’ method, except a greater feeling of ‘warmth,’ essentially a way of pretending that what is happening is not about business and money. When it falls short of this, it is shown up for what it is — a splendid testament to the British love of the amateur, someone who does what they do for the love of it.”

Pat: In the U.S., the viewing facilities have for many decades been the preferred recruiters. Their databases are constantly refreshed, and a top-notch facility will have more than 100,000 names with contact information in their current database. They are able to slice and dice these by income, age, certain product usage (e.g., presence of kids or pets in the home), occupation and past participation in previous research. They take potential recruits through carefully layered screeners by speaking to them on the phone. In some cases, American QRCs prefer to

It seems to some U.K. qualitative researchers that the perceived U.S. model of qualitative research has indeed begun to dominate the industry globally, resulting in a yearning for a “golden past,” one that may never have existed.
use independent or private recruiters, especially for difficult-to-recruit categories, such as high-level business executives, or for client-provided lists of target physicians.

U.S. qualitative researchers have long been mystified by the U.K. preference for independent recruiters who call on their stable of respondents to be interviewed in the recruiter’s home. Despite the regulations and certifications mandated by MRS and supported by AQR, this system seems archaic and ripe for abuse and repetitive participation.

As for high incentives, it is true that the U.S. is less shy about money matters than the U.K. We are a nation of immigrants. There is little inherited wealth here. First- or second- or now third-generation Americans know their worth because they earn their way by their own hard work and ingenuity. Our society is built upon personal accomplishment, where being an “amateur” is not prized. Time is money, simply put.

Interviewing and Analysis

Peter: It is in the actual practice of our work that prejudice truly comes to the fore. In a recent issue of the International Journal of Market Research, Roy Langmaid writes in “Working in Depth” of how our industry has been shaped by two tendencies, the U.S. tradition of “scientism” contrasted with European “humanism.” In the 1980s, the late Peter Cooper (CRAM) perceived these differences in the two models:

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<tr>
<td>Object</td>
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The established belief set is that the American model relies on misguided faith in a measurable, almost quantitative approach to qualitative research, an emphasis on rationality and objectivism and, most important, a literal belief in the data. Once the fieldwork is complete, clients have little need for the researcher’s input with regard to analysis and interpretation. The “hearsay” proof thought to confirm this bias is the use of highly detailed discussion guides (including times for each section), the supposed “debrief” given immediately following the interviews with no time for analysis, and “blind” use of projective and enabling techniques to add interest for the observers of the sessions without support of in-depth interpretation to further understanding. Roy Langmaid sees “a preoccupation with structure and bureaucracy in the form of topic guides, detail and the paraphernalia of recruitment, viewing facilities, observing people seen or unseen (that) all contribute to a
We may feel we perfect innovation in the U.K., but the genesis of much innovation in the research industry is in the States, and we would do well to pay attention to what is happening there.

distortion of natural rapport that is then covered up by a pretence that we are all relaxed, being ourselves, answering truthfully.”

Add this to the U.K. perception of some U.S. clients actively discouraging the opportunity for detailed analysis, and no wonder there is a view that many American researchers allow themselves to be stopped from what they do best, agreeing to impossible deadlines without a battle. This impression is summed up by a colleague who states, “U.S. clients do not understand what insight is, and too many U.S. moderators enable this ignorance.”

**Pat:** There is no doubt about it: the U.S. client is engaged by the qualitative research they initiate. They yearn to hear the voices and see the body language of the consumers they want to reach. And, yes, all clients are not angels, particularly when they go abroad and try to control everything out of their U.S. comfort zone.

The view in the U.S., however, is that we welcome clients’ attendance and participation in the back room. Having been there, they are more likely to buy into our strategic recommendations for their brand objectives. They are more likely to feel satisfied that the recruiting is on specification and that they are really getting feedback from their consumers. Having clients in the back room often reveals hidden agendas that have not been previously expressed. We gain more visibility among our end clients at all levels, and we are more likely to be able to answer all of the questions of the research more thoroughly. Playing to an audience does NOT mean bending the findings or playing politics. That is a lose-lose for everyone.

Of course, we are likely to be tired after flying and conducting interviews. The benefits of a preliminary debrief at the end of a project, however, cannot be underestimated. It is a time to correct any misperceptions that may have happened in the back room and to find out how consumers’ feelings and attitudes compare to expectations held by the client. Asking first, “How does what we have heard today compare to your expectations,” gives us time to take a breath and listen to what the research is really all about. It is always wise to preface our own back-room remarks with, “Of course, I have to delve into this more deeply while writing the report, but a few things do stand out already…” Since most studies require a presentation when the report is completed, in-person or by phone, it is good to know in advance if there are controversies brewing that our written work and final presentation can put to rest. The clients are there, so we do not let them leave without knowing our point of view and any cautionary findings.

As to detailed discussion guides, they represent mutual communication. The clients brief us on their objectives. We return to them a discussion guide that covers the objectives they have expressed, and we add others we think relevant. The guide is not a script but a wish list, internalized by the moderator who proceeds at her/his own pace in intimate conversation with the participants. Projective techniques are used when a sensitive topic calls for them — certainly not for client entertainment, since they often represent “air” time — but for deeper understanding.

**So how much of this is relevant now?**

**Peter:** In nearly 20 years of QRCA membership, I have met and worked with great U.S. qualitative researchers who approach projects with imagination, emotional intelligence, creativity and, most of all, flexibility. At the same time, the U.K. industry has become increasingly process driven. Despite the best efforts of training by the AQR, it is notable that Unilever has recently felt the necessity to roll out their accreditation programme that was started in Asia to both the U.K. and the States. The unsurprising reality is that there is both great and dire work happening in both markets, and there are too few people sufficiently qualified to judge this.

Is there a sound rationale for the prejudice we observe? Well, there seems to be some truth that there are differences in the philosophies of our approaches to qualitative research. But, equally, the British attitude to what is seen as U.S.-style qualitative research may also be a reflection of a snobbish resistance to commercialism on this side of the pond. We may underestimate the importance of meeting the expressed needs of our customers, seeing that as subservient and mindless, while overestimating the obsession with doing things “correctly,” even if that is not what our clients feel they need. This, in turn, potentially leads to a slower changing industry in the U.K. We may feel we perfect innovation in the U.K., but the genesis of much innovation in the research industry is in the States, and we would do well to pay attention to what is happening there.

**Pat:** I have the greatest respect and admiration for the British people, their culture and history. Through AQR and QRCA, I have made lasting friendships with British colleagues. I am impressed by the British emphasis on behavioral economics, and I wonder why this perspective has not taken off in the States. Collaboration with AQR has greatly enriched QRCA, and I believe the reverse is also true. We look forward to many years of learning from each other with openness and without prejudice. ☑
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Technology evolves, practitioners of online qualitative research face ongoing challenges in employing these advances effectively. The Latino Special Interest Group at last year’s QRCA Conference decided to pool expertise and develop guidelines that will help other qualitative practitioners facing the challenges of implementing online qualitative with a Latino target group. These are similar to practices used in online general-market studies and are simply just guidelines, rather than a set of rules.

Language

Many U.S. Hispanics, even those who consider themselves Spanish dominant, have a great difficulty actually reading and writing in Spanish, since many grew up in this country. They feel completely comfortable speaking in Spanish, yet they never properly learned to read and write in Spanish while in a U.S. school.

Allow participants to write in their language of preference (or even in Spanglish), which will make many feel much more comfortable and “at ease” with sharing their thoughts and feelings. Also, in some projects (particularly among more-acculturated Latinos), you should offer the option to read and write in either language, and thus, you should present all the materials, topics and even commands in both languages. However, having to conduct online communities in both languages simultaneously can become difficult and, ultimately, much more time consuming for the moderator. This particular language conundrum applies to most of the online venues mentioned in this article, and careful steps should be taken — particularly at the recruiting level — to lessen this obstacle.

Target

Latinos targeted for online studies are usually younger than 35 years old because they grew up interacting online. Latinos older than 45 years old can participate in online studies, most likely, if they are educated and have a high income. Latinos who are not educated and have a low income or are older than 45 years old can participate online using a mixture of qualitative methods (i.e., phone or in person). Note: We have found that Latinos between 35 and 45 may fall into varying categories of technological awareness and use, depending on education and income levels.

Recruiting

Recruiting is a key aspect of online studies with Latinos. In the U.S., recruiting is done through off-line recruiting for Spanish-dominant participants and via online recruiting panels for acculturated participants. In Mexico, recruiting is done off-line and through online panels. When doing projects that require extensive video recording and photos, more emphasis should be taken in selecting tech-savvy participants who own smartphones and know how to video-record properly and how to take pictures.
Tools to Use

Online Chats
Online chats can be implemented quickly and can be highly effective. Due to the fast pace of these discussions, we recommend a maximum of eight participants per chat and evaluating only a few simple ideas, in order to allow group interaction. Managing a group that is answering simultaneously through chat could be a challenge to a moderator who is not proficient in typing quickly; this is compounded if the chat is in Spanish. Finding the letter ñ and accenting vowels can be time consuming on an English keyboard.

A bilingual co-moderator or a client liaison is recommended to handle the questions from clients, since the group conversation happens at such a fast pace. Using a browser that incorporates a Spanish-language spellchecker helps tremendously because it automatically adds accents and suggests spelling revisions as you type. It is easy, for example, to add a Spanish dictionary to Firefox.

Mobile Qualitative
Mobile qual is a reliable option when projects require that Latino participants become aware of rote or unconscious shopping and usage behaviors. For example, they are in “shopping mode” while purchasing products in supermarkets, so answering research questions while they shop encourages them to gain awareness.

Stand-alone mobile projects, however, are currently limited because most of the mobile platforms rely heavily on text, and text is limited on the mobile devices. We recommend using mobile hybrid projects with Latinos either through bulletin boards, online diaries or focus groups because participants can text longer responses in bulletin boards using their computers or explain choices verbally in a focus group. Very soon, however, mobile phones and platforms will be able to handle more video and audio content, so participants will be able to provide richer responses, which will make stand-alone mobile projects more attractive, both for Latino research and broader applications.

Bulletin Boards
Because of this method’s flexibility, bulletin boards are the most popular online

Recruiting Latinos
In the U.S.: recruit off-line for Spanish-dominant participants; through online panels for acculturated Hispanics.
In Mexico: recruit off-line and through online panels.
In Brazil: recruit off-line.

Language
Many U.S. Hispanics who consider themselves Spanish dominant struggle with reading and writing in Spanish since they never learned to growing up in U.S. schools. Offer the option to read or write in both Spanish and English, but expect to hear and respond in Spanish in video and audio content.

Techniques
1. Curiosity & Novelty
Latinos are drawn to what is different and modern. Promote alternatives to text, like video, music or photos.

2. Belonging
Community is very important. Use humor and group thinking to get them involved.

3. Self Expression
Latinos love to express themselves. Be a fun, informal, personable moderator to encourage expression.

4. Easy Participation
Use direct, clear and simple questions. Incentives should require minimal effort.

CONCLUSION
The best set of Latinos you can recruit for qualitative studies is the tech-saavy, younger-than-35 group. They will be able to provide rich feedback when input is encouraged through videos, music and photos. Don’t be afraid to use mobile platforms combined with the ever-popular bulletin-board forum. Online communities are the most engaging tool, so use them for your long-term research projects.
methodology for Latinos. First, bulletin boards provide equal opportunity for expression of each participant by allowing each of them to interact with one another without interrupting each other. Latinos love to talk and energize others as a group by listening to others’ opinions. Second, Latinos are allowed to express their feelings in ways other than words by using multimedia tools (pictures, music and videos). This flexibility of responses matches a broader spectrum of Latino preference and overcomes any difficulty related to expressing emotions verbally.

Possible problem: English-speaking clients may expect to be able to follow bulletin-board posts in English during the board exercise. As an alternative, they may want Spanish transcripts translated into English for follow-up study. Research suppliers should point out in their proposals to clients that translation is an extra cost that requires additional time. (Note: Real-time translation is more expensive than translation done after the board process ends.) Additionally, Spanish-speaking participants may have difficulty navigating some online platforms because commands can be confusing in translation. Anticipate technical barriers, and write instructions in participants’ own language on how to solve them. Sometimes, it is sufficient to use universal English commands, most of which are familiar to users worldwide.

Video-Based Bulletin Board (VBBB)
This is the favorite online tool for Latinos younger than 35 years old who have access to smartphones and “top-tier” technology. The moderator asks questions through a video format by looking at respondents in the “eyes” and expressing his/her personality, which helps establish contact and authenticity for participants. Participants answer the questions through video, showing their nonverbal gestures and feelings. Since younger participants are more tech savvy, they take quality videos and pictures. Keep in mind, however, that video-based bulletin boards are more costly than standard bulletin boards because each Spanish-speaking video requires an interpreter who does a voice-over in English.

Online Communities
Also called MROCs, these are highly engaging for Latino respondents since, through time, participants get to know each other and value their sense of community. This methodology last months or years, which makes it very attractive for long-term co-creation projects and for longer-lasting projects where habits are explored.

Types of Techniques and Questions
We have learned that Latinos love to express themselves and to stay in contact with their families and friends using Facebook. They like to chat among each other and to share pictures, music and inspirational messages. These activities are fun to them. Therefore, engaging in qualitative research should maximize Latinos’ sense of curiosity, novelty, belonging, self-expression and participation. Here are our recommendations to fulfill these needs and spark participation.

Curiosity and Novelty
Help participants be part of something different and modern.
• Use mixed-media projective techniques, which help reveal participants’ feelings by promoting a mixture of responses as alternatives to text: pictures, videos and music. For example, participants can communicate the moods for stimuli with music; they can develop a collage using photos, videos and music; or they can use the whole web as their source of stimuli for discussion. This provides an entirely new perspective for the analysis.

Belonging and Self Expression
Develop an ambiance that encourages people to meet, share experiences, listen and express their opinions in playful ways.
• Use humor and group thinking as energizers. Group thinking uses the first participant’s answers as an example to guide the conversation.
• Be a fun and personable moderator by using and encouraging an informal writing style. Show you are an authentic person by engaging respondents with video.
• Praise Latinos. Praise goes a long way with Latinos because they like to please others and be appreciated. Continual acknowledgement of participants’ comments from a moderator reinforces awareness that someone is there to listen to them and to take care of them.

Easy Participation
Explain that incentives (cash and prizes) may be gained with minimal effort.
• Use direct, clear and simple questions. Participants should not take more than 30 minutes per day to answer questions.
• Avoid questions that lead to “yes or no” answers. Questions must end with, “Why do you say that?” or “What makes you feel this way?”
• Double-check the meaning of their answers when Latinos provide short responses. This may mean that they are not interested in the topic or are not sure. So, ask them, “Are you sure you mean this: ‘XYZ?’”

Note: We thank Ricardo Lopez for contributing his insights into this article. We also appreciate Liliana Caceres’ help in organizing the Latino SIG presentation online, “Maximizing Your Online Studies with Latinos.”
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Dramatic changes in qualitative research today have made QRCS think differently about how we work as qualitative consultants. As communications technology and media habits evolve rapidly, we gain more and more ways to connect with our research targets. Research users expect qualitative insights that are authentic, actionable and more timely and cost effective than ever. These trends keep us all busy exploring and experimenting to find better ways to help our clients get what they need from qualitative research.

We would like to share a few ways that we have found to make qualitative projects more productive, effective and rewarding for everyone involved, by focusing on what we call “Destination-Driven Design.” What do we mean by that? In a nutshell, our #1 focus — from initial requests for proposals through post-project discussions about how the project turned out — has become: “What does this research need to show or tell our clients to help them make decisions or take action? Where do we need to wind up?”

Making the leap to Destination-Driven Design has led us to re-think almost every aspect of how we engage and work with clients throughout a qualitative project. Here are a few simple suggestions from our evolving list of best practices:

- Self-educate and share.
- Define the destination.
- Envision the evidence, from input to interpretation.
- Engage the team.
- Reflect and refresh.

Self-Educate and Share

We encourage qualitative researchers — from newbies to masters — to get in the habit of continuously learning about classic and emerging qual methods that they have not tried before. This can be quite easy and interesting, as long as it is not done “under the gun” with a deadline looming. In addition to using the many resources that QRCA provides (see Sidebar), we find that designing and conducting hands-on pilot projects is a great way to expand our experience with approaches that are new to us.

D-I-Y Education

Rosalia jumped into the world of mobile, online discussion boards and webcam sessions with both feet a few years ago by conducting a number of pilot projects, always setting them up as if working with a real client. In the webcam session shown on the next page, (platform courtesy of FocusVision InterVu), the goal was to understand what target users expect of a new hand-and-body lotion

Available Resources

If you design, conduct, interpret/analyze or buy qualitative research, it is important to explore qualitative approaches that are new to you. It is easy to expand your options by tapping into the many knowledge-sharing resources available, including:

- QRCA.org/Publications/QCast Webinars
- LinkedIn QRCA Qualitative Research Discussion Group (open to non-members and members of QRCA)
- www.newqualitative.org (click on the red bar at the top of the home page for “New Qualitative Guide” and “NewQualBlog”)
concept, in addition to how well the actual product fulfills those expectations. She tried many ways to deliver the objective — concept discussion, product-application sequences and projective techniques to explore emotional reactions to the concept, product sample and users’ current lotion. She was able to see what the experience was like for the moderator, participants and observers, while generating non-confidential examples to share with clients.

**Education through Collaboration**

Betsy tends to be a bleeding-edge adopter of new technologies. She likes to do pilots to understand ways to use digital and mobile communications in qual research, as well as how the experiences feel to participants and observers. She has benefited especially from team collaborations, such as the Global Village project (initiated by Ilka Kuhagen and Corette Haf and hosted courtesy of FocusForums). A dozen QRC volunteers from around the world teamed up to see how they could maximize the value of using online discussion boards among teens to envision future mobile and internet communications opportunities. The moderators had the chance to watch each other in action and share their experiences with clients and colleagues worldwide. (Read more about this pilot project in the Spring 2008 issue of Q/RCA VIEWS.)

**Knowledge-Sharing**

Qualitative buyers and users can vary greatly — even within the same company or team — when it comes to familiarity with or preferences concerning qualitative research. Qualitative researchers cannot assume that potential new clients have ever seen an online discussion board or share any common notion of what “focus group” means. We find that most clients have little time to educate themselves about qual options, and the prospect of conferring with many specialized providers to get up to speed can be daunting. At the same time, clients do want to feel confident that whatever kinds of qualitative research they use will give them the results they need.

So, we find it essential to have quick ways to help the research buyers/users that we work with expand their awareness of qualitative options that are relevant to their goals. We have been steadily building up a collection of anonymized visual examples (distilled from pilots like those described above or from actual projects with client permission) that we can share during initial discussions or when proposing project designs. We find that when research buyers/users can see and “try on” potential ways to meet their objectives, this can trigger highly productive discussions about exactly what those objectives are and how the research results will be used.

**Define the Destination**

In the past, when there were far fewer qual methods to choose from, and setting up qual projects could take weeks, RFP discussions often started out in a process-driven way: “We need to focus group some ideas…” or “We need to do some usability/shop-alongs/etc.” First priorities, by necessity, were to define the targets, launch the recruiting, arrange the travel, etc. Once the field prep was underway, research consultants and clients would work together to flush out their specific goals and develop design recommendations.

Today, qual projects may require much less time up front for field prep, but many more methods are available, and often multiple methods must be used to achieve a project’s goals. So, it is more important than ever for initial client-consultant conversations to focus clearly on the research “destination” in order to determine which approaches to even consider.

**Example**

Recently a packaged-goods team wanted to launch a new entry into an established category. Their initial goal was to “quickly generate and optimize a range of distinct new-product concepts for quantitative testing.” Thorough up-front discussion of “Where exactly does this qual phase need to get us?” revealed that their objectives were far more complex: work iteratively with target consumers to better understand the category, develop target personas, generate and optimize test-ready concepts and positionings for the quant phase, and explore alternative product forms.

Once the destination was fully fleshed out, we were able to design a three-step project that got us there — with mobile-enabled experience-sharing at home and in-store, online discussion boards to evolve concepts/positionings and in-person groups to integrate everything. If we had failed to clarify “where we need to wind up,” we could have suffered a case of “scope creep” or missed the destination entirely.

We continue to get qual requests that tell us only what is listed in the “process-focused” box on the next page. Sometimes, the requester has little or no knowledge about the project. Sometimes,
they don’t realize that we need to know more. In any case, we find there is nothing to lose by reaching out immediately to ask for the kinds of input that lead to better qualitative design. The research buyers/users may not be able to fill in all the blanks for us, but each bit of upfront input contributes to a more successful outcome.

Example
This example (below) shows one activity from an online qual project intended to inspire new marketing ideas, where the goal was to understand how extremely devoted target users feel when they interact with a particular brand. At the top is a gallery where participants could select photos that express how they feel in certain situations with the brand. The

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**Input**

d. My friends and I have a Bike Club, where we ride our bicycles around the area.
f. Almost every day after school I play either basketball or volleyball recreationally with a group of my peers.
i. Games offline. I have a board game night once a month and we play Monopoly or Risk.
j. I bike a lot, see d for details
k. I tutor underprivileged students how to read and do math.

**Hang with friends, listen to music, watch NASCAR, play guitar hero, play tennis.**
I like to hang with friends and do just whatever.
I can’t go a day without listening to music so whenever I’m getting ready or just sitting in my room or the car I listen to music.
NASCAR is my favorite sport and I always watch it on TV and go to the races.
I love playing guitar hero on my Xbox whenever I can.
I like to go out and play tennis for exercise.

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**Output**

How brand advocates spend their free time
“Output” section shows one way that this input can be quickly distilled for discussion with the research users.

Up-front attention to input and output can go a long way toward helping researchers make better design decisions, as well as setting accurate client expectations about what the research will deliver.

Engage the Team
Research buyers/users often say that the most compelling value of qualitative research today is that it helps them “connect” with their targets, and our own experience bears this out. However, not everyone on a project team may want, need or have the time to connect with participants to the same degree during a qual project. We find that it helps to discuss team members’ roles and availability up front when developing plans. It’s no longer sufficient to say, “Who wants to attend the focus groups?” or “Please log in to the discussion boards anytime!” We now try to clarify who needs to “be there, up close” through every step of the research, who “just needs to stay in the loop” and who will approve changes or decisions along the way — and how that will affect the types of research evidence and insights that we need to generate and share with the team.

In previous proposals, we included a short list of the steps required to complete the project, with rough time indicators. As timeframes have shortened, we have replaced that with a simple calendar or flowchart that shows, on one page, exactly what we and the client team must do, and when, to reach the destination by the agreed deadline. This makes it easy for everyone to see how the pieces fit together (including team check-ins and debriefs) and either commit to their responsibilities or challenge the timeline before it is too late. This becomes our roadmap that is checked continually until we reach the destination.

Example
A client team, starting from scratch, had exactly three weeks to fully define, research and rationalize a range of totally new product concepts to their most important client. Neither we nor the clients were sure this was feasible, but postponement was not an option. We shared a one-page calendar showing our best
guesses at what we each had to do to reach the goal within the timeframe available. Seeing all these pieces on one page made it crystal clear that there was absolutely no “wiggle room.” We all rose to the challenge, made a mutual commitment and got to work.

The result was true team collaboration that accomplished the goal, as well as extraordinary client engagement with the research, every step of the way. Interestingly, this one-page tool proved just as useful for getting a project with no specific deadlines off the ground and keeping it energized to completion.

Reflect and Refresh
Because we are in an era of tremendous experimentation and evolution for qualitative research, it is especially important to make time at the end of each project to reflect on what worked, what didn’t, what can be improved and what new ideas and approaches to consider in the future. Research users should be willing to give feedback, and qualitative consultants should seek it.

The final “Reflect and Refresh” step of each project should focus on what did or did not help reach the intended destination:

- In what ways was the learning valid/on the mark? Reliable? Actionable? Essential vs. nice to know vs. not necessary?
- Any missing pieces, unknowns, uncertainties?
- What were the bonuses or valuable surprises?
- What aspects of the experience worked/did not work for participants, and for the client/user team?
- Implications for future research?

Getting Where You Need To Go
In this brave new world of qualitative research, taking a Destination-Driven approach offers tangible benefits to both qualitative researchers and research buyers/users.

As a research buyer or user, you can feel more confident that your qualitative project will enable your team to make decisions or take action, because your qualitative partner will help you:

- Define the starting point objectives.
- Filter down the vast range of qualitative options to relevant choices.
- Come up with a realistic plan with the flexibility to adapt to learning along the way.
- And make the journey transparent and collaborative to the team.

Qualitative researchers will find that focusing on the research destination can lead to more efficient processes, focused outcomes, client engagement and trust as a research partner.
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The acronym “BRIC” refers to the four powerhouses of the emerging markets: Brazil, Russia, India and China. Collectively, emerging economies like these may offer greater opportunities for growth than more mature markets such as North America and Western Europe. Certainly, businesses are doing increasing amounts of market research in the BRICs.

Therefore, both clients and research suppliers might find themselves traveling to these countries on business for the first time, potentially with short notice to prepare. This article is for you.

Just getting to these countries is pretty demanding, let alone the need to work while you are still adjusting to the local time, language and cultural differences. Here are some tips that go beyond the basics to make your trip easier, smoother and more enjoyable.

Welcome to China
Traveling to China is a vibrant and unique experience. China’s culture is one of the world’s oldest. It is not uncommon in Chinese cities for visitors to see a hundreds-year-old Buddhist temple against a backdrop of modern skyscrapers and alluring shopping centers. Many travelers observe not only the vast number of people packed into mega cities but also the importance of harmonious social relations among people that define daily life here.

Business visas require an invitation from a Chinese business and a letter of introduction from a U.S.-based company. This can take a couple of weeks, but if you look online, you will see a few companies that can expedite the process for you.

While overall China has a low crime rate relative to other countries, in cities, travelers should take the usual precautions that they would take in any major large city.

Taxis are comfortable and affordable, although some travelers may be distressed by a lack of seatbelts. Most important is that taxis provide the added benefit of a local helping you arrive at your location. One tip is to always have your destination’s address spelled out in Chinese characters. Taxi drivers rarely speak English, so having your address written in characters is often necessary. Hotels are usually staffed with English-speaking personnel able to translate the name and address of your destinations. Subways tend to be clean, comfortable and efficient, but they can be filled in rush hour. Make sure to carry cash and coins to buy tickets.

Being able to speak a few Chinese phrases can go a long way toward easing relationships. The Chinese language is important, as it provides a window into how the Chinese view and interact with their world. Note that Mandarin is spoken in most of China, while Cantonese is spoken in Hong Kong and Macao.

Air quality for many large Chinese cities is poor, so adequate preparations for those sensitive to pollution is advised. Eat only cooked food and/or peeled fruit. Stick to bottled water, even for brushing your teeth. Hotels for international busi-
ness travelers will provide bottled water in your room.

Each city provides a diverse experience in China, and most travelers head to Shanghai and/or Beijing. Shanghai is largely considered China’s economic powerhouse, while Beijing is considered its cultural capital.

Beijing
Of course, The Great Wall and Forbidden Palace are must-see attractions. Visiting hutongs, or traditional courtyard residences comprised of alleyways, provide spectacular experiences of China’s cultural past. For nightlife, many visitors enjoy heading to the Sanlitun district for its vibrant bars. If you have a little more time, you may wish to visit the Temple of Heaven and the Summer Palace.

Shanghai
In Shanghai, the Bund area provides a glimpse of Shanghai’s colonial past, with the glistening skyline of Pudong’s skyscrapers. Xintiandi and the French Concession are trendy areas in Shanghai that offer a nice variety of interesting nightlife. One tip is to go outside Shanghai to see one of the ancient water villages. A personal favorite is Zhouzhang, as it provides a glimpse of rural and ancient China.

Outside of these cities, Hangzhou is a historical gem located about 120 miles (193km) from Shanghai. One of Hangzhou’s most popular sights is the West Lake, a UNESCO World Heritage Site. Another place off the beaten path is Zhujiajian, a mountainous island archipelago and emerging vacation spot near Ningbo. There, you can enjoy beach activities, as well as sightseeing activities, sculptures and temples.

Food
China is a country with a tradition of fine cuisine that goes back thousands of years. Both Beijing and Shanghai have excellent local cuisine, as well as food from other parts of China. As you have probably heard, in many restaurants you can find things you may consider to be uncommon or unusual on the menu. Many menus have pictures of the dishes to help you choose what to order. You may find it easier or more comfortable to eat at one of the numerous Western-style restaurants in either city. Another option is to eat at your hotel or one that caters to Western travelers and offers menus in English.

Travelers who are interested in trying the best food that each city offers will find a lot of information online. Local colleagues who know your food preferences may also be helpful.

Warning to vegetarians and those with special dietary requirements: finding food you can eat may be difficult. Many regional cuisines feature pork and shellfish, not only as main dishes but also as ingredients in sauces. Some travelers prefer to order plain main dishes with sauces on the side. Consider bringing fortified energy bars or compact snack foods like fruit and nuts. Once you arrive, you may also wish to seek out
Welcome to India
An immersion in the Indian experience, even for a few days, can be a profound one. Travel to India is a fascinating journey that will likely both entrance and exasperate you. While visiting “emerging” market India, we recommend that you prepare yourself to “embrace chaos” and accept organic processes, and truly allow your innate qualitative research nature to come to the fore. Be an explorer in the original meaning of the word — expect the unexpected! Do not despair when things do not go according to plan.

The fundamentally adaptive nature of India’s culture and ways of working are aiding the rise of this emerging economy. India is famous for its impromptu and ad hoc solutions. A bit of humor and creativity takes you a long way in India, and obstacles during fieldwork can most likely be solved if you think outside of the box.

Delhi
The Delhi airport is an hour from the heart of the city, although it can take longer in peak hours. The underground metro is the best bet to get around the city and completely bypass the chaos of traffic.

Do whatever you can to get a full day’s free time, and go to Agra to see the Taj Mahal. The four-hour drive each way is a spectacle and adventure in itself, and the Taj Mahal really is spectacular — a true wonder of the world. Before you head back to Delhi, stop for a meal at the Oberoi Armavilas right next to the Taj Mahal, and contemplate the contrasts of this world. Enjoy the journey.

If you have already done the Taj trip and would much rather sample Delhi’s delights, Dilli Haat is the place to visit for some of the most beautiful handcrafted souvenirs from around India at extremely reasonable rates. If you have an interest in history, the son et lumiere show at the Old Fort will encapsulate 5,000 years of the city in one hour for you.

Mumbai
In Mumbai, visit Crawford Market, and roam through the chaos of everything from mango and litchi sellers to stamp-size shops stocked to the ceiling with hand-embroidered lace and ribbons. Spend a couple of hours in Chor Bazar (also called Thieves Market) if you are looking for antiques (or things you typically pay a fortune for in Crate & Barrel), or visit the silver jewelry sellers behind the Taj Hotel.

Do go for a local black-and-yellow-taxi ride, and enjoy the interiors of zebra-striped polyester fabric, natural ventilation through rust holes in the floor board, an electrified (possibly blinking or moving or both) elephant god on the dash board and a friendly, beetle-nut-chewing driver, eager to show you around. The fare is cheap, but do keep a map handy — not for the driver (who will only be confused by a map) but for yourself, so you can find your way back. Direct by naming landmarks or special places of interest.

Welcome to Brazil
Many Brazilians will understand Spanish if it is spoken slowly and clearly; however, they likely will reply in Portuguese. English is not widely spoken, but you can get by because Brazilians are very friendly. Three expressions to help: “Bom dia” (good morning); “Tudo bem?” (how are you?/how’s it going?); and “Obrigado” (thank you).

Business dress is almost always business casual except in the Financial Sector, where ties are still in use. In Rio, beach dress has its own rules (shorts, sandals, T-shirt and no jewelry or wallet in view). No matter what you wear, Brazilians will know that you are not Brazilian, based on the way you walk and look.

When traveling in Brazil, you must take precautions to ensure your safety. Brazil is the most dangerous of the BRIC countries; the major cities are known for a high rate of assaults. When visiting these cities, especially Rio and São Paulo, do not walk alone; instead, walk in groups, preferably accompanied by Brazilians. Carry as few valuables as possible. Keep attaché cases, nice bags, cameras and phones out of sight. When you want to get somewhere on your own, order a taxi from a reputable taxi service. Do not explore the streets without a guide. Keep a small wad of cash separated from your other cash, to give to an attacker in case you get assaulted.

Brazilians often change their plans at the last minute, and generally they do not make commitments for more than one or two days into the future. So, be prepared to receive last-minute invitations and to make last-minute changes to meeting times and social calendars.

São Paulo
When arriving at either airport, Guarulhos for international flights or Congonhas for domestic flights, you can safely take a taxi from the airport taxi service: you can prepay the trip using cash or credit card, and the driver takes you to the next destination. The metro system in São Paulo, although crowded, can allow you to avoid the horrendous traffic of the city if there is a metro station located close to your destination.

grocery stores that carry Western food and bring some back to your hotel.
Buses are generally not a good option because they are over-crowded. During the weekend, visit Ibirapuera Park and see a scene similar to New York’s Central Park (people walking around, cycling, etc). At night, eat churrasco (grilled meats) at Fogo do Chao or another restaurant; or eat grilled fish at Galetos; and then go to a bar with dancing and live music, or to the rooftop bar at Unique Hotel.

**Rio de Janeiro**

When arriving at either Tom Jobim (international) or Santos Dumont (domestic) airports, you should take the prepaid taxi service. In Rio, hailing a taxi from the airport or the street is dangerous; always take taxis from taxi stands or ordered by telephone.

With limited “downtime,” your best options are: (1) sit on a rented chair on Ipanema Beach, Posto 9 (in front of the Caesar Park hotel), have a drink with peanuts and enjoy the scenery; (2) during the day, walk around the neighborhoods of Ipanema, Leblon and Copacabana; (3) with more time, visit Sugar Loaf Mountain by taking the cable car, Corcovado (the large statue of Christ) and Tijuca Park with its tall, elegant trees.

Brazil has a barbeque (“churrasco”) meat-oriented culture, yet plenty of salads and tropical fruits (especially at lunchtime), as well as grilled fish and rice, ensure that almost everyone will be comfortable at the dining table. Beer and “caipirinhas” (made with sugar-cane rum, vodka or even sake) are popular. Food and water are fine in big cities.

**Welcome to Russia**

Fyodor Tyutchev, one of the great Russian poets, wrote that Russia’s “soul is of a special kind” — something one can appreciate “by faith alone.” Here are some tips to help you get started when visiting Russia.

Get familiar with visa requirements by using an expediting service. A traveler must have an official Russian Business Invitation letter obtained by your hosting company in Russia from the Russian Ministry of Foreign Affairs.

You will do just fine getting around the airport, as there will be plenty of English signs; plus, you will turn up at the right place if you just follow the crowd. If your budget allows, you may wish to arrange for a taxi to pick you up. When flying into Moscow Sheremetyevo airport, an alternative is to use the taxi desk; they have set rates to different areas of Moscow, usually starting at about $50. Do not take unofficial taxis.

Note that Moscow has multiple airports that are not close together, and there is a lot of traffic. If you are traveling further within Russia, be sure to plan enough time to travel between airports.

Arrange your next day’s transportation at the hotel when you arrive; many travelers are surprised by taxi shortages at morning and evening rush hours, sometimes requiring an hour or even longer wait times. You will likely be paying double the custom rate if you use hotel taxis, but if you are a first-time traveler and do not speak Russian, it will be your most hassle-free option.

People generally speak English or can find someone who does. If people do not smile, it does not mean they are not friendly. Make sure you have your destinations written in both Russian (Cyrillic) and English.

**Moscow**

In Moscow, there is so much to see and do. Do your research online, and make time for the things of greatest interest to you. We recommend starting with a visit to Red Square with its many favorite sites, including St. Basil’s Cathedral with its colorful onion-domes, as well as the beautiful Russian Orthodox churches in nearby Cathedral Square. Old Arbat Street is a pleasant, pedestrian-only street lined with restaurants and shops, although souvenirs may be overpriced.

Try taking the metro for the cultural experience. Many metro
stations are architectural masterpieces with chandeliers, marble columns and stained-glass windows. Some of the most beautiful ones are Komsomolskaya, Novoslobodskaya and Arbatskaya. It is well worth the trouble to also obtain a metro map with station names in English so that you can read the signs. Getting lost is part of the fun. With a little persistence, you will find an English speaker who can help you.

**St. Petersburg**
St. Petersburg is one of the best cities in the world to enjoy a walk. If you have only a short time free, this is the thing to do. Take a walk on the famous Nevskii Prospect all the way to Neva River, admire the exterior of the famous Hermitage Museum, cross the bridge over to the island and watch a few people getting married.

If you are traveling in June, consider yourself lucky, and enjoy summer white nights when it does not get dark at all at night and you can safely walk until late, to extend your sightseeing opportunities. This walk will delight both the historian and the romantic.

Admirers of Russian cathedrals may wish to visit the **Church of the Blood (Spas na Krovi)**. This medieval-style church is known for its richly decorated exterior and huge interior lined with mosaics.

**Food**
Eating out in Moscow and St. Petersburg offers many culinary pleasures. The food is good, but on the expensive side. You will notice that drinks are also more expensive and smaller than what you would encounter in the U.S. Coffee houses are in abundance, and do go to the local ones instead of the familiar Starbucks. In addition to a great selection of coffee and tea beverages, they also serve light food. Expect smaller portions and slighter slower service. Restaurants allow smoking, but they often have non-smoking sections.

Popular foods include *blinis* (like French crepes stuffed with a variety of foods), smoked fish, caviar, meats, soups and dumplings called “*pel’meni*.” We recommend trying a variety of soups, including *borsch* and *solyanka* (sorrel soup), as well as “*vinegret,”* a Russian holiday salad that is available every day in many restaurants. *Mors* (cranberry or other berries) is a favorite non-alcoholic beverage.

If you are in **Red Square** and interested in an authentic Soviet-era food experience, visit **Stolovaya N57** on the third floor of the famous GUM department store. Excellent versions of typical Russian foods are offered, with signs in English and Russian.

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Most recently, David Van Nuys interviewed Laurie Tema-Lyn, founder of Practical Imagination Enterprises. Integrating creativity and qualitative research for the past 25 years, Laurie inspires and guides client teams to create new business strategies, fill the pipeline with product and positioning concepts, and uncover robust insights about existing and potential consumers/customers. She draws her inspiration from the diversity of projects and clients she gets to work and play with, and she has consulted in areas as wide ranging as advertising and zoos. Laurie interweaves her passions for theater, music, creative cooking, teaching and storytelling into her work.

A long-standing member of the Qualitative Research Consultants Association, Laurie is Editor-In-Chief of VIEWS, co-chair of the Philadelphia Chapter and a frequent presenter at national and local chapter conferences of QRCA and other organizations. Her book, Stir It Up! Recipes for Robust Insights & Red Hot Ideas was recently published by Paramount Market Publishing Inc.

Strategic Sales Presentations
Jack Malcolm, Booktrope Editions

Reviewed by Bruce Gabrielle
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[Editor’s Note: Bruce Gabrielle is the author of Speaking PowerPoint: The New Language of Business, reviewed in the Fall 2012 issue of QRCA VIEWS.]

Doing great research is not enough. In fact, I have often thought that if you present your findings poorly, the results are the same as doing poor research. Therefore, I am always on the lookout for books that will help me present information more clearly and persuasively to executive audiences. Strategic Sales Presentations is that kind of book.

Personally, I evaluate a book based on how many notes I take while I am reading it, and considering how my pen was flying, I would have to put Strategic Sales Presentations in my top-five presentation books. It provides a complete system for planning, building and delivering a successful sales presentation.

Strategic Sales Presentations was written for sales professionals, especially those who engage in complex B2B sales to executive audiences. If you want to grow your market research business, it will help you with those business-development presentations. It is a great book just for understanding how to communicate with executive audiences, with many tips that can also apply to presenting research findings.

Jack Malcolm, a sales professional and trainer with 20 years’ experience, lays out a research-based method for planning, creating and delivering an executive sales presentation. I appreciate that his methods are based on research and principles from cognitive science, rhetoric, organizational behavior, persuasive speech and personal sales, but sharpened against the flint of Malcolm’s personal experience, eyeball to eyeball with executive audiences.

Malcolm builds on that research, offering exact phrases you can use to open an executive presentation, based on his two decades of experience, eyeball to eyeball with executive audiences.

Finally, Malcolm covers some important topics to deliver your presentation masterfully. He offers several helpful lists, like ways to calm your nerves before an executive presentation and phrases to use (and to avoid) in order to sound authoritative in front of an executive. For instance, one insight that stuck with me is to be careful of using excessive qualifiers like “really,” “very” and “so.” It makes you sound more imploring than important.

I was especially interested in Malcolm’s discussion on making your presentation interactive and why encouraging the audience to speak could help you close the sale. For instance, it is more convincing if someone in the room tells you the value of your solution than if you tell them. In addition, since value is often hard to quantify in ROI terms, the audience can do a better job of quantifying the value than you can.

This book gives wonderful ideas, like ending a presentation by asking, “What do you think?” and letting the audience talk. This is such an obvious thing, and yet it is not something I consciously practice. I used this technique at my last sales meeting, and the small group exploded with their excitement to move forward. I could see how important this question is, not only for understanding my position with the audience but also for igniting them to keep moving forward after I left the room.

Overall, Strategic Sales Presentations is one of those rare books that gives you everything you need to get into the mind of an executive and come out with a signed contract. If your paycheck depends on selling your ideas to executives, I recommend you make room on your bookshelf for Strategic Sales Presentations.
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Jeff Hasen, John Wiley & Sons

Reviewed by George Sloan
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Hasen quotes a United Nations study reporting that there are more mobile phones in India than there are toilets. He also quotes a Nielsen study reporting that many people in Africa can get their hands on a mobile phone more easily than they can on clean water.
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We are again excited to present the work of internationally renowned illustrator Steve Skelton, in his collaboration with the QRCA VIEWS Humor column, to bring you periodic cartoons poking fun at our industry. You’ve seen Steve’s work in Hallmark cards and Playboy magazine, and for clients like McDonalds, Hasbro, Nestle and Apple Computer. His work is irreverent, funny, unique — and now it graces the pages of QRCA VIEWS. Enjoy!
I just gave *Bridesmaids* five stars on Netflix so I could see my new “top 10,” left feedback for an eBay seller, asking her to give me good marks as a buyer, too, Facebook - “liked” The Body Shop to get a free coupon, LinkedIn a recommendation for a colleague who’d just done the same, and Tweeted my girlfriend a Groupon I thought she’d like (plus I get mine free.)

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