DECEMBER 2003

QUIRK'S
Marketing Research Review

Qualitative Research

> Ethnography as a research tool

> Refocusing innovation

Special reports

> The state of the focus group
> Roundtables tackle industry issues

Quirk's Marketing Research Review
Volume XVII Number 11

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Popular diets fatten sales of slimming meals

Chicago-based Mintel's new report Slimming Meals reveals that although the entire category of foods positioned as weight loss aids has experienced an increase in sales, the sports and energy bar market has had the largest gains, with a 40 percent increase in the past two years. (In the weight loss food category, Mintel groups frozen meals and meal replacements such as liquid meals and sports/energy bars.)

The growth trend largely reflects the success of Slim Fast as the dominant brand, followed by more recent growth from Jenny Craig, Zone Perfect and the Atkins lines of bars.

Increased media and regulatory attention has driven consumer awareness of the diet bar as a weight management aid, and bars positioned as diet aids continue to perform well, particularly as they cater to those following specific diet plans.

The sports and energy bars segment will experience the largest increases as sales are predicted to grow 59 percent by 2008. Many popular diets recommend eating several small meals a day or limiting carbohydrates, both of which can be satisfied by sports and energy bars. Mintel's Global New Products Database shows that there have been 368 new snack bars introduced so far this year.

The market for slimming meals has almost doubled in sales in the past five years as consumers respond to a vast array of choices from manufacturers. Much of the growth in the slimming meals market is coming from new products and line extensions that offer consumers more variety in the form of convenient entrees, new flavors in frozen meals and meal bars that cater to a particular niche market, such as Atkins Nutritionals with its meal bars.

In the meal replacement category, Slim Fast is trying to revitalize its image, particularly as competitors develop products that target consumers following special diet plans such as Atkins. Atkins liquid meals had $18.5 million in sales in 2002, a substantial leap from just $4.6 million in 2000. Even more significant was the increase in sales of products by EAS, a company that is closely linked to the Body-for-Life Program. EAS meal replacement beverages went from less than $1 million in sales in 2000 to $18.3 million in 2002. Slim Fast products, on the other hand, while increasing slightly in sales within that time period, lost almost 2 percent in market share.

Slimming foods are predicted to increase 28 percent in the next five years. As more time-pressed consumers look for healthier alternatives to fast foods, they will demand slightly more gourmet offerings. There is a growing concern about the health effects of obesity and more Americans will change their diets to lose or maintain weight. Prepared meals will fare particularly well, especially as manufacturers focus on making them more attractive to consumers, with larger portion sizes and restaurant-style varieties, even for low-calorie entrees.

One-quarter of Americans eat prepackaged low-calorie meals, such as Weight Watchers or Healthy Choice. Respondents in the older age groups (55-64) are more likely to eat slimming meals. The youngest consumers are least likely to eat slimming meals: only 13 percent say they eat them on occasion. Certainly, the prime target market has long been thought to be less price-sensitive but most time-starved, which corresponds to those in the middle range of age groups. The oldest consumers (65+) tend to be more price conscious, and because they are often retired they will have time to prepare something at home rather than rely on quickly prepared frozen meals.

Consumers eat 80 percent of their meals at home, but with less time to spend in the kitchen, frozen foods will continue to gain in sales by positioning themselves as a better alternative to take-out, for a group that has less disposable income to spend on restaurant meals. Because consumers conditioned to eating out and spending money on high-quality meals are unwilling to compromise on taste, companies will need to offer consumers a wide variety of meal choices and continually reformulate and improve their products. For more information visit www.mintel.com.

Sales growth of private label goods outpaces branded products

ACNielsen U.S., Schaumburg, Ill., has released its U.S. Trends in Private

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names of note

St. Louis-based *Maritz Research* has named **Michael Brereton** president, following the appointment of **Tim Rogers** to the position of president for the Maritz Automotive Group.

WeeKeng Lee and **Su Liu** will head the new Shanghai office of Reston, Va.-based *WirthlinWorldwide*. **Vincent J. Breglio**, managing director of WirthlinWorldwide Asia, will assist in sales and client service.

Bart Gamble has joined Cincinnati-based *MarketVision Research* as vice president, with responsibility for managing and developing research business.

Gamble **Wintz**

Jeanne Wintz has joined *Gilmore Research Group*, Seattle, as senior vice president.

Lorna Walters has joined *Research International* as CEO of the United States business unit. Though her time will be divided among the firm's network of U.S. offices, she will be based in Research International's Stamford, Conn., office.

Seattle-based *Q2 Brand Intelligence* has named **Brad Bortner** to run the firm's northeast regional office in Cambridge, Mass. The firm has also named **Bruce Bortner** senior consultant. He will be based in Atlantic City, N.J. In addition, **Lynn Reed** has been promoted to president.

Research International, Chicago, has announced senior leadership changes. **Jon Wilkinson**, who has led the Research International Group as chairman and CEO since 1995, will retire in June 2004. In his place, **Roger Banks**, currently CEO Mainland Europe, will become group CEO. **Colin Buckingham** will take on a new role as CEO, global business. And **Mark Penn** will become non-executive chairman of the group.

Steve Smith has joined *Murphy Marketing Research/TRENDTOWN*, Milwaukee, as vice president/research director. In addition, **Amy Kendziorski** has been named research analyst.

Smith **Kendziorski**

Andrew Cutler has been promoted to senior project director at *Integrated Marketing Associates*, a Bryn Mawr, Pa., research firm.

Teresa Newberry has rejoined *Marketing Research Services Inc.*, Cincinnati, as senior research analyst. The firm also announced three new hires: **Sheilah Wagner**, director, analytical services; **Kevin Steuart**, account manager; and **Dave Stewart**, senior project director.

Paul Kirch has joined *Harris Interactive Service Bureau* as director, client development. He will be based in Seattle.

New York consulting firm *Interbrand* has named **Gary Singer** chief strategy officer for North America.

Braintree, Mass.-based research firm *Perseus Development Corporation* has named **Carl Henning** vice president of international operations.

Fort Worth, Texas-based *Crescent Real Estate Equities Company* has named **Jeanette Rice** vice president, market research.

New York-based *Simmons Market Research Bureau* has named **Ken Wollenberg** executive vice president and general manager of the Simmons Integrated Marketing Solutions unit.

Saskatoon, Saskatchewan-based research firm *Itracks* has named three new account executives: **Brad Hogan**, **Andrea Hansen** and **Henok Ghebremicael**.

U.K. health care market research company *Isis Research* has named **Debbie Corning** director of oncology syndicated services. She will be based in Princeton, N.J.

Corning **Carbone**

Global research firm *Synovate* has named **Rick Carbone** CFO.

Sara Vickers has joined *Millward Brown* in Sydney as account director from the U.K.

Beth Daush and **Brook Fagley** have been named vice president of client services at the new Dallas office of

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ACNielsen to increase size of Homescan panel in U.S.

ACNielsen U.S. plans to more than double the size of its U.S. Homescan consumer panel, the largest expansion in the history of the service. This expansion from 61,500 to approximately 125,000 households will be completed during 2004 and 2005. The ACNielsen Homescan consumer panel provides insights into what types of households buy specific CPG categories or brands, how often and where they shop, their use of coupons and other promotions, and other attitudinal and usage information. For more information visit www.acnielsen.com.

Publish survey results to blogs

QuestionPro Inc., a Seattle provider of online survey hosting and market research services, is now offering new publishing tools that enable users of its online survey technology to publish results automatically to Internet Weblogs, commonly known as blogs. A blog is a Web page that contains frequently updated information arranged chronologically that can be anything from political journals to personal diaries and can focus on a single subject or a broad spectrum of topics.

The QuestionPro Q-Blogger will automatically publish a blog entry to the user's Weblog containing a link to their electronic survey hosted by QuestionPro. QuestionPro's Q-Blogger effectively creates a real-time mechanism for gathering opinions and feedback from blog readers. Responses are automatically tabulated and available in real time at QuestionPro.com.

The blog phenomenon is picking up momentum and working its way to mainstream Internet users. Blogs are now serving as a popular medium for interest groups, project teams and even news sites for sharing ideas and information immediately via the Internet. QuestionPro online survey technology gives blog owners a tool for research, opinion polls and project collaboration. For more information visit www.questionpro.com.

SPSS updates Clementine, Verbastat; adds Cleo 2.5

SPSS Inc., Chicago, is now offering Clementine 8.0, the latest version of its data mining workbench. The new features of Clementine 8.0 are based on end-user feedback, introducing new capabilities for increasing productivity and deploying interactive models online.

As part of the Clementine 8.0 launch, SPSS is also introducing Cleo 2.5, a new, XML-based offering for deploying predictive models online. The Cleo deployment environment enables multiple users to simultaneously access Clementine scoring models through a customizable browser-based interface. This allows business users to immediately score single records, multiple records, or an entire database on an ad hoc basis.

The firm has also released a new version ofVerbastat, which enables market researchers to code verbatim responses to open-ended survey questions. Verbastat 7.0 offers complete coding for Web, CATI and CAPI surveys. The new version, which is based on the Microsoft .NET platform, offers more import and export options for faster data transfers, an enhanced interface toolbar that provides access to commonly used functions, and simplified code frame creation.

Verbastat 7.0, which is compatible with data collection packages such as Quancept, In2quest or Surveycraft and sound files in CAPI or CATI interviews, adds more import options in the latest version, such as the ability to work from data collected with the Dimensions suite — SPSS' integrated suite of tools for survey design, data collection, data management, analysis and publishing of results. The new version also enables users to copy not only code frames but also classification patterns from one study to another.

Verbastat 7.0, which leads coders through the process screen-by-screen and links with Microsoft Word, simplifies code frame creation by filtering on specific respondent criteria for immediate coding. This new version also features new reporting options, such as response tracking (tracking the history of a response including edits and splits); respondent-level reports (showing individual respondent information and how it has been edited and classified); crosstabs and graphical reports (which can assist in identifying data trends). Verbastat also displays image files. For more information visit www.spss.com.

Panel gives access to network security influencers

Natick, Mass.-based Sage Research, Inc. is now offering access to the Sage Network Security Panel, a group of IT professionals with network security purchasing authority. The Network Security Panel gives providers of security products and services a tool to meet market research needs. Drawn from the Sage Panel, Sage's Network Security Panel consists of nearly 4,400 IT professionals who have decision-making authority within their organizations for network security products and services. Forty-five percent of the Network Security Panel members are vice president-level and above. For more information visit www.sageresearch.com.

Apian Software releases SurveyPro plug-in

Seattle-based Apian Software has release DirectCollect 3.1, a plug-in to its SurveyPro program which lets the survey author save surveys for elec-

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research industry news

News notes

Chicago-based **Information Resources, Inc.** has received an unsolicited, non-binding indication of interest from **Open Ratings, Inc.** to acquire all of the outstanding shares of IRI common stock for at least $3.75 per share in cash, together with contingent value rights (CVRs) associated with IRI's antitrust lawsuit pending against ACNielsen Co., The Dun & Bradstreet Corp. and IMS International, Inc., and certain commitments to fund the antitrust lawsuit, on terms at least as favorable as those being offered by Gingko Acquisition Corp.

Under the terms of IRI's previously announced merger agreement with Gingko, the IRI board, consistent with its fiduciary duties, may consider alternative transactions that could reasonably be expected to lead to a proposal that is superior to Gingko's. After careful consideration, including consultation with its independent financial and legal advisors, the IRI board of directors determined that Open Ratings' indication of interest could not reasonably be expected to lead to a binding offer superior to the Gingko transaction. The IRI Board also unanimously reaffirmed its recommendation that IRI shareholders tender their shares into the Gingko offer.

VNU has completed its strategic review of **ACNielsen's** European Customized Research business which it commenced earlier this year. VNU has concluded that shareholder value will be maximized from continued ownership of its Customized Research activities and their development within a strategy leveraging the company's Customized Research proprietary assets and capabilities. At the beginning of the year, VNU also announced the strategic reevaluation of Claritas Europe. At press time, this review process had not yet been completed.

New York-based **Arbitron** has announced preliminary results in a research test for its new television, cable and radio audience measurement system, the Portable People Meter (PPM). "For the better part of a year, Arbitron, Nielsen and the industry have pointed to response rates as a key issue that had to be resolved before the Portable People Meter could be deployed as a means of measuring audiences for radio as well as broadcast and cable television in local markets," said Stephen Morris, president and chief executive officer of Arbitron, in a company press release. "We said that Arbitron would work with Nielsen to devise techniques that could increase the percentage of consumers who would accept our invitation to take part in PPM surveys and then carry the meters on a continuing basis.

"I am pleased to report that Arbitron and Nielsen have developed two separate methods that have increased the rate at which we can recruit consumers for PPM surveys. Initial results are in line with what Nielsen would expect when recruiting a new set-top meter panel, which is what we both wanted to achieve. While the response rate test needs to be completed so that we can confirm that acceptable rates can be sustained over time, and the turnover rates also remain acceptable, Arbitron is confident that we have found a solution for this key issue."

Acquisitions

Synovate has acquired **ISIS Research Limited** (ISIS), a health care research firm. ISIS will become a part of Synovate Healthcare, Synovate's global health care division.

Paris-based **Ipsos** has acquired the Research Division of the **NCS Pearson** group, the Australian subsidiary of the British media group Pearson. Specialized in the provision of data collection services, software and systems to address the information processing needs of the clients, the division has offices in Sydney,

Calendar of Events Feb/Mar

The European Society for Opinion and Marketing Research (ESOMAR) will hold Technovate 2, its worldwide market research technology and innovation conference, on **February 1-3** in Barcelona, Spain. For more information visit www.esomar.org.

ESOMAR will hold its Global Healthcare 4 conference on **February 22-24** in Paris. For more information visit www.esomar.org.

ESOMAR will hold its automotive marketing conference on **March 1-3** in Lausanne, Switzerland, in conjunction with the Geneva International Motor Show. For more information visit www.esomar.org.

The Council for Marketing and Opinion Research will hold its annual Protecting Our Assets respondent cooperation workshop on **March 2-3** at the Flamingo Hotel in Las Vegas. For more information visit www.cmor.org.

The Market Research Society will hold its annual conference, Research 2004, themed "Welcome to The Dream Economy," at The Barbican in London on **March 11-12**. For more information visit www.mrs.org.uk.

ESOMAR will hold its Asia Pacific conference on **March 28-30** in Shanghai. For more information visit www.esomar.org.

Melbourne and Brisbane.

Separately, Ipsos also acquired the assets of Mackay Research, a company founded in 1979 by social researcher Hugh Mackay. The company publishes The Mackay Report, a subscriber-based series of four quarterly studies which delve into the mind and mood of Australians on specific topics. These new business lines will be gathered under the Ipsos Australia umbrella.

Awards/rankings

Inc. magazine has ranked research firm **ath Power Consulting Corporation** #361 on its annual Inc. 500 ranking of the fastest-growing private companies in the country. The Inc. 500 ranks privately held companies according to sales growth over the past five years. The Andover, Mass., company had five-year sales growth of 494 percent.

Herndon, Va., research firm **WebSurveyor Corporation** has been named a Rising Star on the 2003 Deloitte Technology Fast 500, a ranking of the 500 fastest-growing technology companies in North America. A special category, the Rising Star list ranks 25 winners that have been in business less than five years, but at least three years. They are ranked based on average percentage of growth in revenues over three years (2000 to 2002).

Separately, Seattle-based research firm **NetReflector, Inc.** ranked #275 on the 2003 Deloitte Technology Fast 500. Rankings are based on average percentage revenue growth over five years, from 1998 to 2002. NetReflector grew by 1,087 percent from $123,000 to $1,460,000 during this period. Overall, companies ranking on the 2003 Deloitte Technology Fast 500 had growth rates ranging from 469 to 296,080 percent over five years, with an average growth rate of 5,493 percent.

Four technology providers have been nominated by the **Association for Survey Computing** (ASC) for the MRS/ASC Joint Award for Technology Effectiveness. The aim of this new award is to identify the company or individual that has achieved the highest level of excellence in creating software or technology that promotes greater effectiveness in the practice and delivery of research. An independent panel of industry experts is judging the award, which the ASC is co-sponsoring with the Market Research Society (MRS). Tim Macer, panel chair, announced the short list at the ASC's international conference at the University of Warwick in September.

Nominees are (product/provider):

Harmoni/**Information Tools**. A data analysis and investigative tool for consumers of research data which allows them to combine data from a wide variety of sources, ranging from consumer research at the respondent level, sales and retail audit data, to aggregated data such as economic indicators, climate statistics, media

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By Stephen J. Hellebusch

To double-code or single-code?

In quantitative marketing research, we typically ask open-ended questions in the surveys we conduct and record what the respondent says verbatim. Then what?

We do not report what is said exactly (the verbatim), because that would generate a very, very long report. What happens next is that the verbatim is coded. Coders group similar responses, and create summaries of what the consumers say.

For example, suppose we are conducting an interview about air fresheners. The respondent is asked "What do you like about it?" A random selection of verbatims from the question are examined, and code numbers are assigned based on the similarity of various statements. For example, one person says, "I like the smell, because it is sweet." Another says, "I like the sweet smell, and the color." Both would get a "sweet smell" code, and the second one would also receive a "like the color" code. These coded responses are then assigned to categories. In this example, the "sweet smell" comments may be assigned to a Smell/Odor category, and the color comment would likely be assigned to a category called Appearance.

One person can make two comments that fall into one category. Say what? For example, if a respondent said, "I like the smell because it is sweet and subtle," the code for "sweet smell" would be assigned, as would a code for "subtle smell." Since we want to count people, not comments, the category net is created that tells us how many people made a Smell/Odor comment. The person who said "I like the smell because it is sweet and subtle" would be counted once in "sweet smell," once in "subtle smell," and only once in the category net line, because it counts people, not comments.

Comments	**Total Respondents**	
Base: total (250)	#	%
Smell/Odor (Net)	65	26
Sweet smell	55	22
Subtle smell	32	13

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The net line will always be equal to or less than the sum of the number making the comments in the category. For example, the two comments, as shown in the box, add to 35 percent, but were given by 26 percent of the 250 respondents. If the net is not less than or equal to the sum of the comments, something is wrong.

One challenge, handled in different ways by different researchers, is a comment that logically fits into two different categories. Suppose, with our air freshener, someone says they like it because, "The size makes the placement easier." There is Placement net which includes comments like "would place in family room" or "would put in bedroom." There is also an Ease of Use category that includes codes like,

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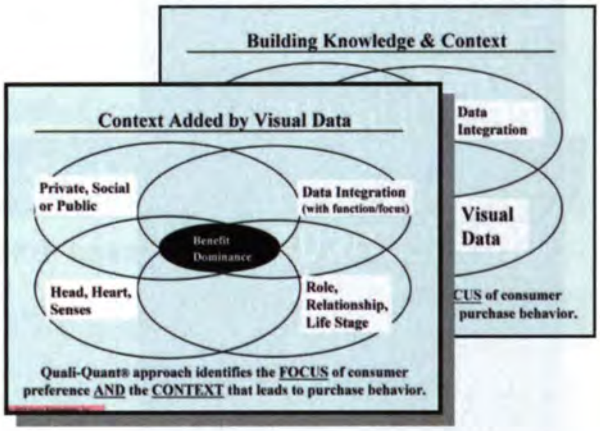

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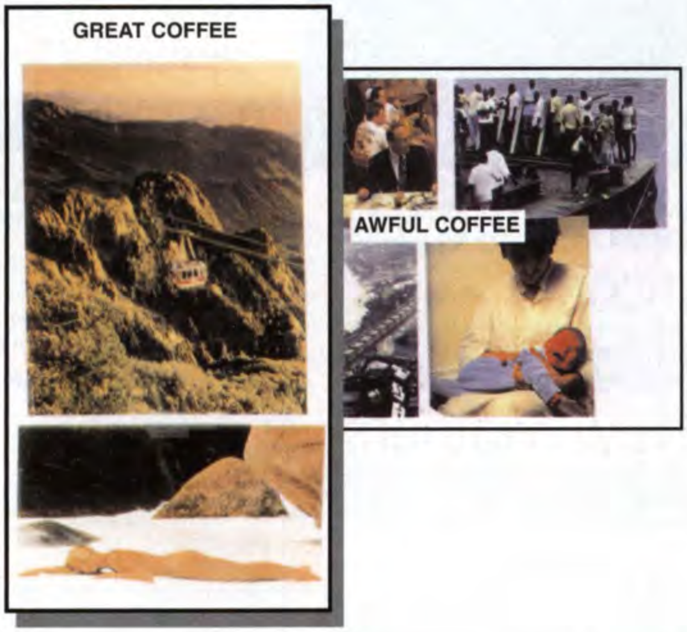

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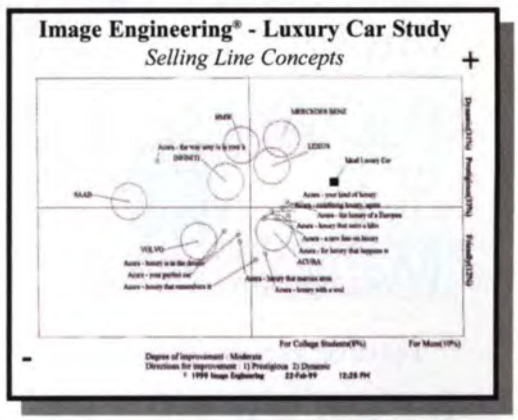

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Double-coded

Comments	Total Respondents	
Base: total (250)	#	%
Ease of Use (Net)	63	25
Just plug it in	25	10
Size makes placement easier	20	8
Easy to remove from package	18	7
Placement (Net)	60	24
Put in family room	25	10
Size makes placement easier	20	8
Put in bathroom	12	5
Put in bedroom	11	4

"easy to remove from package" and "just plug it in."

Some coders double-code — that is, put the comment both places. The 20 people who said "Size makes placement easier" are the same 20 people in both the Ease of Use and the Placement categories.

Others will single-code — that is, only include the comment once, in the category judged to be the best fit. In this case, the comment fits better in Ease of Use, since the size is what is making things easier, and all of the Placement comments are referring to a place.

Single-coded

Comments	Total Respondents	
Base: total (250)	#	%
Ease of Use (Net)	63	25
Just plug it in	25	10
Size makes placement easier	20	8
Easy to remove from package	18	7
Placement (Net)	40	16
Put in family room	25	10
Put in bathroom	12	5
Put in bedroom	11	4

So, what percent made Placement comments? It depends. If you double-code, you would say 24 percent. If you single-code, you would say 16 percent. Neither is right; neither is wrong, technically. If many comments are double-coded, results will look very different than if only single-coding is used.

If the research user is thinking of the categories as mutually exclusive with respect to the comments (usually an implicit assumption), then that user will take an incorrect understanding from the double-coded question. It is likely that this will occur when the user is given a presentation that summarizes the research where only the category net lines from the open-ends are shown. There is no way to know from just the net lines that the same comment is in two category nets.

If you like to understand what you are looking at, it may be helpful to learn whether the open-end responses are double-coded, triple-coded, or (perhaps) single-coded. It may make a big difference in how results from an open-ended question are understood. | Q

By Sharon Seidler

Conducting qualitative research on a global scale

Envision this: You're in a supermarket and want to buy some cereal. After looking over the choices, you decide on Cheerios and Frosted Flakes. Then, in the personal care aisle, you pick up Dove Shower Gel and Pond's Moisturizer. You finish your shopping and go to buy a gift for a college student, finding what you want at The Gap. Now, you're ready to grab something quick for lunch. Nearby choices include McDonald's and Pizza Hut. On your way home you pick up a movie at Blockbuster.

So what? Big deal. Well, the wrinkle is that you could be in London, or Edinburgh or Sao Paulo, Paris, Milan or Frankfurt. Today, if you take a vacation "across the pond" or due south, you will have to actively seek out towns that haven't been Americanized with brands from the States.

The globalization of brands is now a fixture in many companies' marketing plans. And this often involves implementation of global research, qualitative and quantitative.

What follows are guidelines regarding global research for qualitative studies.

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Understand and respect local practices

You will work with a local qualitative researcher who is, of course, fluent in the local language and knowledgeable about culture and customs. You will also need to engage a simultaneous translator if the spoken language is other than English.

Do not impose your practices on the local moderator, but be alert to his/her customs. You can turn over the U.S. discussion guide to be translated and used, but ask the local person to read it and make suggestions for changes. An exercise that works here might not work there.

In the U.S., for example, eight women talking for 90 minutes about a topic fills the bill; in Sao Paulo the custom calls for a two-and-a-half-hour group with considerable upfront time spent just getting to know one another. So leave room for the local researcher to do things her way.

Get early buy-in from the global team

The more globally involved the company is with its products, the more likely the corporate culture will reflect this. In some companies I have wondered if I haven't walked into a meeting at the United Nations. People are bi- and tri-lingual, and multicultural as well. They are often citizens of the world.

At the start of your qualitative project, arrange for one or more meetings via phone or in-person. These meetings will ensure that everyone starts out on the same page in the hymnbook...and you'll also have the opportunity to pick


Tired of traveling?

their brains. Encourage the team, especially those intimate with the non-U.S. regions, to give you an education on the history of the markets. Also, encourage them to formulate hypotheses about what might occur in the research and what alternative scenarios and findings might emerge.

If you are working on a supermarket CPG product, visit a market or two. Do mini ethnographies and just observe people at the section.

Cohesion and team-building early in the process will pay off later in good attitude and also in quicker implementation of next steps.

Be sensitive to the pitfalls of translations

If you are working with new product concepts or communications, they will, of course, need to be translated. Often, idioms are included and these don't translate well. A slight change in the translation can drastically alter the meaning…and the ultimate response.

If you are fortunate enough to travel to non-U.S. markets for the research, be sensitive to the translations and how they are affecting responses. Build in sufficient time between group interviews to make changes to the materials to more closely reflect the intention of the original concept or communications. The local researcher, simultaneous translator and local members of the client organization should be included in meetings between interviews to make sure the translations are optimal.

Understand the context

If you travel to the foreign region, do not simply attend the groups and leave. Soak up the culture as much as possible. If you are working on a supermarket CPG product, visit a market or two. Do mini ethnographies and just observe people at the section. Take note of where your client's product is shelved and what surrounds it.

Arrange for a bilingual speaker to accompany you. Ask her to engage a shopper and ask questions about the purchase decision without divulging the brand in which you are most interested. A debriefing with your companion will provide you with a modest education of the marketplace and local consumers.

Weave, don't glue

You are now ready to write the global report. Your local non-U.S. researcher should be writing the document that pertains to that region. You are responsible for the global report.

It is tempting to simply incorporate the two documents in such a way that shows how the two (or more) regions responded, structuring a document along this line: U.S. findings/Latin American findings.

Avoid this sort of "paste-and-glue" report because it is not as useful as it might be to your client. Your job is not to glue, but to weave. As a weaver, you should digest all of the findings and begin the report with common themes that were reflected in all regions. Areas of common ground are most useful, so at least begin with the threads of analysis that link respondents across the globe.

First, think globally...then act locally

The mandate to think globally and act locally is a good one and it applies particularly well to qualitative research. While it's important to weave the multiple reports together and look for common themes, it is equally important to be sensitive to differences among the regions.

Thus, for a communications study for a CPG product, it would be ideal to be able to identify a consumer insight that resonates in the U.S. and beyond — some basic truth that applies to consumers in Atlanta and Sao Paulo and Frankfurt.

However, when it's time to address the nitty gritty of product formulation or packaging, for example, local differences and preferences must be acknowledged. No product or service is completely portable and ready for export as is.

Wonderful opportunity

Globalization of companies and products necessarily involves global research. Qualitative global research represents a wonderful opportunity to provide guidance to correctly launch a new product in multiple and disparate regions. The suggestions outlined can help the global qualitative research process work smoothly and enhance your overall contribution. | Q

 By Robert Sims

Women are from Venus, men drink scotch

Schnapps maker looks to find out how feminine is too feminine

Not too many years ago the notion that "real men don't eat quiche" gained some notoriety, and popular psychologist John Gray has made a career out of his observation that men and women are from different planets. While it is not a novel notion that men and women act differently, think differently and have different preferences, these differences do, nonetheless, create a problem to the manufacturer or distributor who seeks to market to one sex while not alienating the other.

This was the problem faced by the Sazerac Company, Inc., a New Orleans-based alcohol distributor, which was seeking to create a new, more modern, sexy image for a vanilla liqueur product, Dr. McGillicuddy's Vanilla Schnapps. A new bottle design was developed, and several new names were tested including Kiss, Vanilla Kiss, French Kiss and French Vanilla Kiss. The product was to be designed primarily to appeal to women, but not so much so as to represent "quiche" to "real men."

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Part of the research task that we faced was to test the willingness of men to try the newly repackaged product. The research was designed to test a model developed by a member of our staff. The model was developed based on the results of a series of focus groups that we conducted and works on three basic assumptions:

Assumption 1: Though men and women likely share some preferences for alcoholic beverages, there are some drinks that are perceived to be distinctly feminine and some perceived to be distinctly masculine.

Assumption 2: Alcoholic beverages can be arrayed on a continuum ranging from most feminine to most masculine.

Assumption 3: Male consumers occasionally drink certain drinks that they consider closer to the female end of the spectrum. But there is a point at which a drink becomes too feminine for them.

Our task was to find out whether or not the client's product fell beyond the range of drinks that men would feel comfortable ordering.

Ample basis

In addition to our own focus group findings, previous research provides an ample basis for the assumptions. For example, Traffanstedt, Rohr, and Sparks (1997) found that, though rates of alcohol consumption did not vary by gender, men were more likely than women to prefer beer as their main alcoholic drink. Ullrich and Tepper (2000) found that, due to physiological differences in taste sensitivity, men were more likely than women to prefer bourbon, gin and beer. These physiological differences may account for the psychological associations that have developed in terms of what constitutes masculine as opposed to feminine drinks.

Furthermore, the feminine-masculine dimension of alcoholic beverage preference is not a uniquely American phenomenon. Research conducted by the Social Issues Research Centre (2000) concludes that: "...association of the qualities of men's and women's beverages with 'masculine' and 'feminine' attributes is...a near-universal phenomenon. 'Feminine' drinks are often weaker, sweeter, softer or less 'pure' than their 'masculine' counterparts."

Develop instrument

Given a reasonable basis for the assumptions of our model, the most difficult problem that the research question posed was how to develop a measurement instrument capable of validly rendering the presumed feminine-masculine dimension of alcohol preference. Data for this study were collected via intercept interviews conducted among bar customers in two states in which the product was marketed.

Two measurement possibilities immediately came to mind. First, respondents could be presented with a numbered scale. On one end of the

scale would appear words to the effect of "most feminine," and on the other the words "most masculine." Respondents could be asked to indicate the point on the scale that served as the borderline between the point at which they would feel comfortable ordering a drink and the point at which they would not. They would then be asked to place the client's product on this scale, and comparisons would be made to see whether or not the product fell within the respondent's comfort zone. Though primary interest here was in male respondents, female respondents also would be asked to complete this exercise as a validity check.

Scale problematic

Though the analytic strategy implied above seemed reasonable, the scale itself seemed problematic. First, using simple masculine/feminine terminology may have been too abstract for this purpose as it assumes that respondents know what types of drinks fall into these categories. Second, men may have been hesitant to place themselves on the feminine side of the scale, especially not knowing what drinks that side represented.

Conversely, men, not wanting to appear old-fashioned or to deny their "inner woman" may have been inclined to place themselves too far on the feminine side, or farther than they would actually be willing to go.

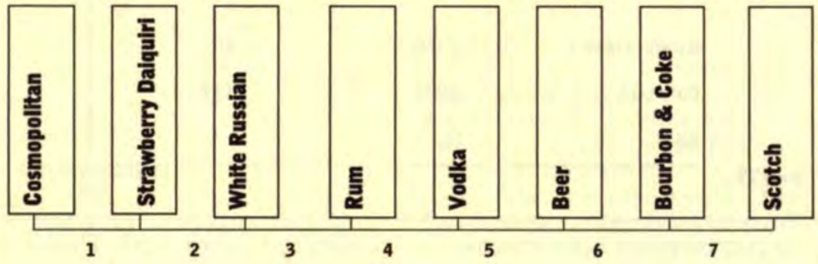
The solution to these problems was to develop a second instrument, which would be used like the first, but which would feature at each scale point the name of an actual alcoholic drink. The main problem here would be to validly array drink names along the masculine-feminine continuum, and to do so in such a way as to be understood by respondents.

Working in conjunction with the client, eight alcoholic beverages were selected for placement on what would form a seven-point scale. They were, moving from most feminine to most masculine, a cosmopolitan, a strawberry daiquiri, a white Russian, rum, vodka, beer, bourbon, and scotch. Survey respondents were shown a scale featuring these drinks and then asked to mark the point on the scale at which they would no longer feel comfortable ordering among a group of friends. (See Figure 1 for the actual question as presented to respondents.) They were then asked to place the client's product, French Vanilla Kiss, on this scale. The scale ranged in value from 1 to 7, with 7 representing the most masculine point.

Given the novel nature of the measurement scheme, it was imperative to validate the measure once the data were collected. Assumption 3 implies that male drink preferences should be bounded somewhere on the feminine side of the preference scale, though not at the extreme end of the scale. Construct validation of this assumption would involve demonstration that the average boundary score for males was less than 3.5 (the scale midpoint)

FIGURE 1

I'm going to show you a scale which lists a range of alcoholic beverages. I'd like for you to think for a moment about how comfortable you would feel ordering these various alcoholic beverages when in a group of your friends. The scale below represents drinks ranging from scotch, on the right, which people sometimes consider a "masculine drink," to a Cosmopolitan on the left, which people sometimes consider a "feminine drink." Using this scale, please mark the point which divides the drinks that you would feel comfortable ordering from the drinks you would not feel comfortable ordering in a group of friends.



Based on what you have seen in this survey, where would you place French Vanilla Kiss on this scale?

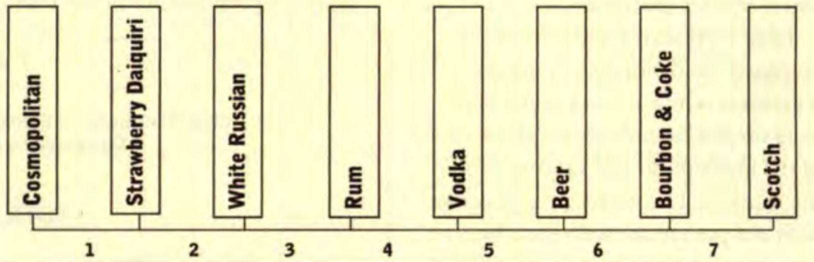


TABLE 1

Construct Validation of Drink Preference Measure

Y = Alcoholic Drink Preference

VARIABLE	B	SE
Gender (Male)	-2.168	.207
Constant	5.031	.112
R2	.29	

n = 273

though greater than 1 (the extreme feminine end of the scale). In correlational terms, the assumption would be a negative correlation between gender and boundary placement.

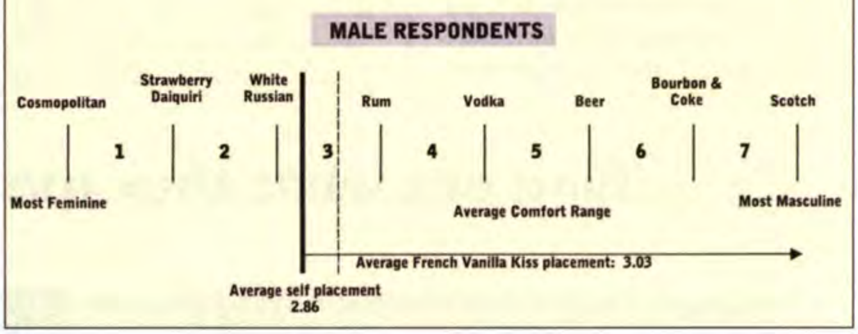
Table 1 presents the results of the construct validation test. A simple regression of the alcohol preference scale on gender indicates confirmation of the assumption and validation of the measure. The correlation of gender with the preference scale is, in fact, negative and significant as indicated by the coefficient for gender (coded as a dummy variable) and its associated standard error. The gender coefficient, in conjunction with the constant for the regression equation, indicates that the average male boundary score (2.86) is in fact to the feminine side of the scale, though not at the extreme (Cohen and Cohen, 1983). These tests serve to validate not only the assumption concerning male preferences, but also the ordinality of the scale.

Assured of the validity of the measurement scheme, the final step in the process was to attempt an answer to the client's question, i.e., was French Vanilla Kiss too feminine for men? Average scores on both the alcoholic beverage preference scale and the French Vanilla Kiss placement scale were computed. A positive test from the client's perspective would indicate a higher (more masculine) score for French Vanilla Kiss than the average male boundary score. Figure 2 indicates that, among male respondents, the average placement of French Vanilla Kiss (3.03) was within the male comfort zone. This average was close to, but significantly higher (p>.05) than the male boundary average of 2.86 as indicated above.

It should be noted that the average

FIGURE 2

Male Placement of French Vanilla Kiss on Preference Scale Compared to Male Preference Boundary



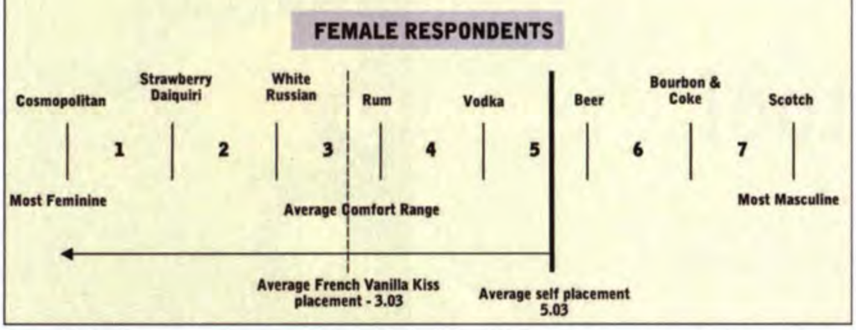
female product placement also fell well within the female comfort zone (see Figure 3). This result was not of particular interest to the client since it was assumed that the appeal of the product would be greatest for women. Nevertheless, the fact that the average product placement scores for men and women were equal, and the fact that the female placement score was much farther from the preference boundary than was the case among men, attests, once again, to the validity of the measurement scheme and of the analytic procedure overall.

Not unique

To note that men and women may have different product preferences is not unique, nor is it unique to take gender into consideration in analyzing

FIGURE 3

Female Placement of French Vanilla Kiss on Preference Scale Compared with Female Preference Boundary



research data. However, the problem faced here went beyond the mere demonstration or consideration of gender differences to the development of a measurement and analytic scheme for the purpose of developing a product primarily designed for women which would maximize general consumer interest in the face of gender differences. In so doing, it would appear that we developed a measurement that in large part avoids what Linz (1969) describes as the tautologous nature of much survey-based research. In using actual alcoholic beverage names to mark the scale, the measures were sufficiently distinct from the underlying conceptualization (the male-female continuum) to prevent false positive readings that often occur when theoretically distinct questions are worded so similarly that the wordings themselves generate positive results.

Finally, it should be stated that the general procedure developed here should be useful not only when gender-based preferences are involved but also when racial/ethnic, economic or other demographic related preferences are under study. All that is required is a product set that can be validly arrayed along the underlying demographic continuum. | Q

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Still a valuable tool

By Jon Last and Judith Langer

In the media as well as the marketing and advertising community, focus groups are increasingly drawing criticism. While 20 years ago it was quantitative researchers criticizing focus groups for not being scientific, now it is often qualitative researchers who claim the traditional or regular focus group is passé and inferior to other qualitative techniques. (Even the word "traditional" implies that the regular focus group is a thing of the past.)

The typical focus group format we refer to here has these elements: a moderator leading the discussion at a research facility with one-way mirror, eight to 10 respondents, one-and-a-half to two hours long, clients observe from behind the mirror and/or through remote viewing. (There are a number of variations of focus groups, including non-traditional ones that last for four or five hours, have 25 or even 50 respondents, have clients directly involved with respondents, take place outside of dedicated facilities, etc.)

Among the criticisms of the standard format are that it is stale, cold/clinical, inhibiting, lacking depth, and that it encourages overly rational and dishonest responses. In a March 2003 *American Demographics* article "The New Science of Focus Groups," for instance, a critic who uses "game nights" among teenagers said the traditional focus group is a process he views as "a customer terrarium, with people behind glass...Focus groups are the crack cocaine of market research. You get hooked on them, and you're afraid to make a move without them."

Clients aren't ready to give up on the traditional focus group

At the same time, the article noted that focus groups continue to dominate qualitative research, citing numbers from Larry Gold, publisher of *Inside Research*, that show companies spent $1.1 billion on qualitative research in 2001, most of it for focus groups. When we asked Gold this fall what percentage of all qualitative research he estimates is accounted for by traditional focus groups, he said probably 85-90 percent.

So if focus groups are so outdated, why are they still such a frequently used technique? Do clients, the end users of focus groups, agree with the criticisms expressed by researchers with competing techniques and by the trade press? Why do they continue using focus groups and, looking ahead, do they anticipate continuing to use the technique in the future?

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To explore the role of focus groups today, we conducted a study among past-year client users. We targeted them as people who could speak to the benefits and limitations of traditional focus groups within a broad context of other research and without any personal self-interest. Over 100 market researchers on the client side (advertisers and advertising agencies) across a range of industries were invited to participate. The sample was an amalgamation of research decision-makers culled from multiple sources, including a list of Advertising Research Foundation (ARF) members, past clients of Roper (not necessarily the Roper/Langer Qualitative Division), advertisers of The Golf Digest Companies and other clients. Over 60 researchers participated in the study, which was conducted in late June through mid-July via a self-directed questionnaire pushed via e-mail and hosted by QualTalk. (Thanks to Ted Kendall of QualTalk for all his assistance in setting up the study site and tabulating closed-ended answers.)

Continued vitality of traditional focus groups

Most of the study was open-ended, as befits our subject. We also included some close-ended questions to provide a directional sense of recent and anticipated usage of various qualitative methodologies.

Using current 2003 and last year's research budgets in tandem, respondents indicated that the mix of methodologies they use is weighted slightly to the quantitative side. Less than half indicated that there had been a recent shift towards using slightly more quantitative (defined as 5-10 percent more) or significantly more quantitative research over the past three years. In fact, over a third (10 percent+) of those interviewed indicated that they had been shifting their research mix more towards the qualitative side over the same time period.

Not only had respondents used traditional focus groups in the past year, but the technique was by far the methodology they used most over the course of their careers. Of other qualitative methods, only in-person depth interviews were utilized by more than half the respondents in the past year. Phone depth interviews, dyads and triads, and ethnography were each used by between a third and four out of 10 during the past year.

A more telling demonstration of the popularity of the traditional focus group is seen in respondents' budget allocations for 2002-3 compared to expenditures on alternative qualitative methodologies. The traditional focus group commanded nearly two-thirds of these end users' budgets on average. Only in-person depth interviews and non-traditional focus groups received greater than 6 percent of the qualitative budget, and they were the second- and third-most popular techniques, respectively.

Asked if the traditional focus group methodology is more relevant, less relevant or no different in relevance than it was five years ago, nearly nine of 10 clients interviewed said its relevance is unchanged (64 percent) or greater (25 percent) today.

The traditional focus group has support from research professionals as much as from general marketers, according to respondents. The idea that its popularity stems from management's embracing its simplicity and accessibility may be true. However, respondents indicated that they, as market research directors, are most typically the force driving the decision to use focus groups. A sizeable seven out of 10 of the decisions to use focus groups came from internal research departments or agencies rather than from marketing or brand management, respondents said.

Alternative qualitative methodologies gain in popularity

While this study points to a continued reliance upon traditional focus groups, respondents display a familiarity and growing comfort level with several alternative techniques. We asked end users which of a list of qualitative methods they or a colleague had utilized and found to be more productive/useful than focus groups. Ethnographic or observational research has been used at some point by half of the respondents and in-depth interviews conducted by telephone were cited by more than a third of the respondents, while online qualitative research (defined as live chats, e-mail or bulletin boards) are seen as useful by nearly two out of 10 end users. However, more than a quarter of those interviewed said no other qualitative technique is more productive or useful than the traditional focus group.

A look ahead at qualitative research usage

More than three-quarters of participants indicated they expect to use non-traditional qualitative techniques more in the future. But, again, our findings point to a pre-eminent place for the traditional focus group in the years ahead. Slightly over two-thirds of those surveyed indicated that they plan to continue using the method as much over the next few years as they have in the recent past. In short, clients will expand the type of qualitative methods they use.

Focus groups = qualitative research

Answers to the in-depth open-ended questions in our survey help to explain both why the traditional focus group continues to hold a prominent place among market research techniques and why some alternatives are attractive.

For most of the clients interviewed, focus groups <u>are</u> qualitative research. These market researchers know that qualitative research is a lot more than just focus groups, but their internal clients do not always make the distinction and may not even be aware that other qualitative approaches exist. The request from the researchers' clients for qualitative research is often expressed as "We want focus groups." Obviously, this may be one reason why focus groups are used more than other qualitative methodologies.

The identification of focus groups with qualitative research also results in FGs being blamed for whatever limitations qualitative has by non-researcher clients — even when client researchers and qualitative practitioners counsel otherwise.

Increasingly, clients want and need hard numbers, respondents said. While focus groups continue to provide insights, several problems arise:

• Marketers are sometimes frustrated not to have projectable findings. In effect, they criticize qualitative research for not being quantitative research.

• Focus groups are sometimes used as a quantitative research substitute because they are (relatively) quick and less expensive than a full-scale survey. While this is hardly new, the increased pressure to deliver research faster and cheaper can contribute to the misuse of focus groups. The hypotheses coming out of a focus group study are taken by some marketers as being definitive answers.

"Traditional focus groups are being replaced by online surveys and telephone interviews for a number of applications in my company... The biggest cavil about traditional focus groups is that they aren't representative. Our numbers-oriented management doesn't trust them." -- Isobel Osius, Meredith Corporation

"Our greatest obstacle is, people want to use [focus groups] instead of quantitative research and then they shy away when they are reminded of the non-scientific way participants are selected and that they are not 'representative.' " -- respondent asked to remain anonymous

FGs as a whole are taken to task when inadequate, unprepared or inexperienced moderators do a poor job. The technique, some respondents said, is highly dependent on the quality of the moderator. More sophisticated market researchers recognize differences among moderators, but non-researchers may assume the problem is focus groups in general.

Fieldwork issues affect the credibility of FGs too, a few respondents said. Concerns about professional respondents and poorly recruited groups were expressed by some clients.

"The recruiting has to be dead-on. When we've had nightmares, it's due to the loose recruiting by the research company. It was a complete waste." -- Sara Killeen, Nike Golf

"Bad groups I've observed...have been more about a moderator who wasn't skilled and simply asked questions from a questionnaire-type guide and never probed 'why' to any response." -- Kathy Canady, The Buntin Group

Clients themselves are to blame for FGs failing, some respondents said. The study sometimes is not thought out enough on the client side, especially when the objectives are not agreed upon. Sometimes the FG process goes well but clients refuse to listen, hearing only what they want to believe. Most striking, some respondents described outright misuses of FGs by clients, such as clients trying to sell respondents on their products or hand-picking favorable respondents.

"Some members of management often argue that we won't learn anything new. Those same people will also say upon our return, 'I could have told you that.' No respect for what the consumer has to say and how they articulate it." -- anonymous

Why do clients use traditional focus groups?

Focus groups are perhaps even more relevant than in the past, according to some respondents, because of the advantages that qualitative research in general provides. Qualitative insights and connection with consumers are needed more than ever, they asserted. Marketers are competing to stand out in an increasingly commoditized world and have also become more removed from real people. They want and need to know the reasons why consumers feel and behave as they do.

While other qualitative techniques may offer these advantages too, FGs are seen by some as an excellent approach for delivering insights and close-up views of consumers and business customers. Specific benefits of FGs respondents talked about include:

• Client comfort. Many clients are both familiar and satisfied with the FG process. A number enjoy — and even love — watching FGs. This comfort in turn makes it easier for advertiser and agency researchers to get acceptance for the use of FGs.

• Cost-effective. FGs are less expensive and more efficient than other qualitative methods, some said.

• Firsthand experience. Viewing FGs from behind the one-way mirror gives clients a feel for consumers and for their own customers. Viewers "get it" on an emotional level. (Interestingly, this advantage was not mentioned for in-person depth interviews.)

• The group behind the group. The experience of clients watching FGs together process has a value in itself. Normally, busy executives are brought together to focus, quite literally, on an issue, typically in an environment free of interruptions from the outside.

"Many researchers in our company prefer qualitative research because they find it more fun, like to travel, and enjoy the richness of information it produces." -- anonymous

"Most people love groups. You get that up-close-and-personal feeling. You're no longer just talking about the faceless 'consumer.' " -- Julie Medalis, Sylvan Learning Center

"Time/logistics. Financial, most definitely. We can do groups much less expensively than any other technique." -- Kathy Canady, The Buntin Group

FGs are and should be used as a first step prior to quantitative research, for exploration rather than decision-making, respondents agreed. At this stage, clients may not even have a clear picture of what their problem is. Among the specific uses mentioned are, in respondents' words:

• Exploring a new category or in trying to understand the underlying drivers of consumer behavior.

• Developing theories or hypotheses to be tested (quantitatively).

• Early exploration of ideas to better understand hot buttons.

• To develop concept phraseology before quantitative.

• To physically show new products or advertising and get visceral reaction to executions, or suggestions for improvement. To help your clients visualize their product being used by actual consumers.

• Disaster checks.

• To back up depth information that was not revealed in a quantitative study.

• Putting a face on the consumer and bringing them to life.

• Use to probe emotional issues, to compare strategic ideas, to explore unknowns, to find ideas for strategies.

Other uses that go beyond research per se include use of FG video clips as a training tool for internal personnel and for public relations purposes; a loyalty tool in itself for a retailer to show the store's concern for customers' views.

Non-research problems with focus groups

Practical and/or political considerations play a role in clients' decision not to use FGs, even among these past-year users.

• Money. Online quantitative research is seen as cheaper and clients may not be appreciative of the quality differences, some respondents said. Since quantification is needed with qualitative research, some companies would rather skip to that phase, leaving out any qualitative research.

• Time and money. These are interrelated reasons: attending in-person focus groups take a lot of both, resources that companies are short on today. Remote viewing (which also costs money) is not necessarily accepted as a good substitute.

• Boredom. Some observers find the FG format too static. Perhaps after watching FGs for years, they want something more exciting.

• Past problems. Internal clients who — rightly or wrongly — were disappointed with previous FG studies may veto the use of the method.

"Time is the enemy. No one wishes to commit to the travel and sometimes this restricts the willingness to go to more distant markets. My clients aren't as interested in video-technology, still feel being there firsthand somehow enhances their experience." -- anonymous

"Focus groups can be expensive and time-consuming to plan and execute. We are resource-constrained on both — therefore, there has to be a good reason to conduct them." -- anonymous

"Start with budget, which always shapes the decision on what methodologies are used. Then add individual preferences, such as a refusal to do focus groups because of a past negative experience. Throw in time pressures and naive research users who have heard that the Internet is faster and cheaper than anything else. Then add the fact that you generally have to do quantitative anyway, to back up the business decision, and it can be difficult to talk people into seeing the value of focus groups as a first step in the research process..." -- Isobel Osius, Meredith Corporation

"Sometimes it is a battle to get marketers/salespeople to agree to focus groups, because they 'seem so static and boring.' What I've realized, the problem is this: [some] marketers and salespeople have a very highly developed sense of entertainment, and they're simply bored by the process. Even though focus groups work (if they're done right) and valuable info is gained by them, some of them have trouble sitting still long enough to realize that they're working. This is probably the longest these people have sat in one room in the past 10 years! The MTV effect is definitely happening here as well, as more and more executives expect flashing lights, a grooving soundtrack and special effects at all times. So, they get pulled in by all the exciting bells and whistles that some companies offer and ignore the depth of info they COULD be getting with traditional focus groups." -- Susan Walsh, Hearst Magazines

"One tool in the toolbox"

This description of traditional focus groups as just one of many techniques was repeated by several respondents. FGs are and should be used when they are appropriate to the objectives of the particular research study. They are not meant to be an all-purpose approach; the fact that other qualitative techniques may be more appropriate in certain cases does not mean the focus group is a bad method.

Variations of group interviews — dyads, triads, mini-groups — and individual depth interviews in-person or by phone are qualitative alternatives that some respondents prefer at times. These techniques have been around a long time too, putting them in the "traditional" category along with focus groups. For some clients, the issue is not either/or — they use a combination of these methods on an individual project or over the course of the year. "I don't see it as focus groups vs. IDIs but just 'qualitative,' " one respondent wrote.

Advantages of IDIs and smaller group interviews cited by some respondents include:

• Greater depth because each respondent is interviewed at greater length than in a FG; more participation by each respondent.

• More appropriate for sensitive topics.

• Avoiding group bias, dominant respondent problem of FGs. Interestingly, while this issue has often been mentioned in articles over the years, only a few study participants brought it up as a FG negative.

• Better for communications research on advertising and concepts, since reactions in real life are typically on an individual level.

• Better for executive-level respondents who don't have time or desire to be part of a larger group or do not want to travel to a meeting location.

• Sometimes the only practical choice, e.g., when respondents are geographically spread out and FG recruiting would be impossible.

• Less expensive than FGs because of fewer respondents and, in the case of telephone depth interviews, no travel costs.

"In-depth interviews in person give a more complete picture due in part to the interviewer's ability to observe discrepancies between what the respondent says and what can be observed on site." -- anonymous

"Once we've decided on qualitative, the decision comes down to small (one-on-one, triad) vs. larger (mini-groups or groups). This choice is usually driven by

the sensitivity of the topic, the need to provide complete privacy, the desire for group interaction, and the potential for group bias. Recently used a mix of groups and IDIs to explore issues of race, class and education. The combination was critical in seeing that people were extremely uncomfortable speaking in what they feared were racist of classist terms. But the same concerns emerged in both settings, helping us feel they were real and powerful." -- Julie Medalis, Sylvan Learning Center

"We don't use traditional focus groups as much as we used to. We have reduced the size of our traditional type groups to four or five respondents. Smaller groups are easier to manage and, more frequently, all respondents participate." -- anonymous

"One-on-ones are more times than not the better choice for B2B research: wanting to get the 'facts' and not the face nor body language nor interactive response. Also these respondents are not likely located in close proximity to each other." -- Tom Flint, FedEx Services

"Often a group environment can move individuals towards the thoughts of the 'leader' in the group. They find common ground too quickly, and it may not reflect the range of opinions on a topic." -- anonymous

Ethnography sparks interest

Among the newer or newly popular alternative approaches, ethnography sparks the most interest as an alternative and, in some cases, a complement to FGs. Several clients said they have used ethnography successfully and several others talked about wanting to use it.

Observing people in their own environments offers a more "honest" view of what people really do, rather than relying on their verbal reports, some respondents stated. Interviews in respondents' homes and other natural settings also put people at ease and encourage greater candor than the "forced" facility environment, some respondents said.

"*With the observational research we were able to observe without the 'respondents' knowing we were observing or what we wanted them to do. Sometimes people* *in focus groups try and give what they think is the right answer we are looking for."* -- anonymous

"The camera doesn't lie — observation sometimes speaks volumes as to how someone truly feels or uses a particular product. I wish I could do more of this." -- Kurt Lowell, L'Oreal

"Identification of new consumers' needs — ethnography research is better. Understanding of potential product issues after launch (in-home visits could be a good idea)...Interaction with the product and the real environment situation." -- Soledad Miguel, H.J. Heinz

A variety of techniques within traditional focus groups can enhance their value, integrating some of the benefits of observational research, a few clients noted.

"[I] have set up mini-groups in which consumers were asked to create collages at home related to the given topic, or take photos of the environment in which the product was used. Can then do content analysis of what they bring to the interview. It's a pretty cost-effective way of getting some more emotional/motivational and ethnographic insight." -- anonymous

Online qualitative research, while not used by as many of the respondents, is seen as offering several key advantages. Like phone one-on-ones, this is a less expensive way of interviewing people all around the country, including hard-to-reach respondents. Logistically, online qualitative can be easier to execute than FGs, too. A few respondents specified a preference for bulletin boards over live chats.

"If a lot of regionality is needed, then perhaps online focus groups or bulletin boards are a better choice. Also, if the target is so obscure that it would be ineffective to try to recruit enough in one region to have groups." -- Susan Walsh, Hearst Magazines

"Online bulletin boards are quick and the input can be much richer and more in-depth, if done right." -- Isobel Osius, Meredith Corporation

"Moving ahead, I do think the nature of our qualitative work will evolve, with more participation by Web, more online, etc. This is more easy to swallow in terms of time commitment and money. The trade-off is that you lose some immediacy of feeling, and the ability to sit as a client group to think and react together." -- Julie Medalis, Sylvan Learning Center

The future

Our research suggests that rather than becoming research dinosaurs, traditional focus groups may remain a — or the — major qualitative method in the near future. Clients find value in the process, are comfortable with it and think it is efficient in many cases. They have strongly defined and articulated opinions regarding the benefits and limitations of the methodology. They recognize that focus groups, when conducted with a skilled moderator and among a well-recruited sample, can deliver breakthrough insights and go beyond the limitations of quantitative research by providing a deeper context from which marketers can assess concepts and ideas.

At the same time, the focus group's share of the qualitative market seems likely to decrease in the near future. Such a shift may result from greater awareness among market researchers and their clients that traditional focus groups are one tool in a diverse toolbox of techniques, to be used instead of or in addition to other techniques — traditional and new — when it serves the research objectives.

Furthermore, for us, these findings suggest that despite the significant inroads that Internet data collection has made within the realm of marketing research as a whole, the online world will not replace the in-person focus group in the near future. Clients we interviewed continue to value the uniquely personal interaction of the focus group in providing flexibility and attaching a human face that the online world is still hard pressed to replicate.

This study also reinforces some other important and inherent advantages of FGs over quantitative approaches and even some other more expensive or extensive qualitative methods. That is their outward simplicity and sensory accessibility: the ease of understanding that can be derived when a client or management observes those magic moments of focus groups, where a participant articulates an emotion or idea that resonates with the rest of the group and, for that matter, with those behind the glass, who capture that moment as a justification of or springboard towards positioning a brand.

The focus group is there in front of all to see and experience. It is not buried within reams of crosstabulations or regression models. It is not lurking somewhere among a full day's worth of IDIs or intercept interviews, but is packaged neatly within a 90-minute to two-hour time frame, exposed and often preserved in its rawest and purest form for many layers of management to see and grasp easily.

Some concern

There is concern, however, among some clients about the continued trend of diminishing response rates in market research, which affects focus groups as well as other methods. The professional respondent is a special worry for focus groups which can be amplified to the point of nullifying the findings in a traditional focus group setting.

And what of that traditional setting? While respondents did not overwhelmingly speak to concerns about the conference room setting of a traditional focus group facility and its potential to hinder open exchanges of ideas from group participants, some weak signals were apparent. Some of the shift towards ethnography and to IDIs is recognition of the limitations of focus groups and a quest towards a better way to obtain more honest qualitative insights.

Lastly, and perhaps most significantly, another pervasive theme is the belief that clients often minimize the impact of focus groups by expecting too much of them. This is exacerbated by decreasing budgets, which not only limit the number of groups that can be conducted — thus placing more and more weight on the groups that are held to produce useful results — but also don't allow for quantitative validation via follow-up research.

Enduring place

The focus group seems to have reserved an enduring place in both marketing research and popular culture as our society continues to evolve (or, some may say, devolve) to an increasingly sound-byte-driven world. The metaphor of focus group as television program continues to have relevance. Even for some clients who have begun to embrace ethnography or other observational research techniques, the focus group still remains as a succinct voyeuristic window into the mindset of the elusive and often otherwise faceless customer. | Q

qualitative research

What's all the fuss about?

By Clynton Taylor

With ethnography showing up all over the place as a "new" market research tool, you have to wonder about its merits. While anthropologists have practiced ethnography to study the natives of foreign lands for the better part of the last century, can it successfully be applied locally, to the world of consumers and revenue? The answer is yes, and no. When ethnography is applied well, the results are incredible.

Ethnography has recently been spotlighted in the *Wall Street Journal, Business Week, The Harvard Business Review, Entrepreneur*, and pretty much every other business newspaper, journal and magazine as a new and better market research method. This article looks at where ethnography came from, what exactly it is, and what it might be able to do for your branding and marketing efforts.

Where it came from

Ethnography has its roots in anthropology and is the study of people and their culture. It was ethnography that took anthropologists out of their armchairs in England to the locales where the people they were studying actually lived. There, anthropologists often lived with the native people for over a year at a time. They would participate with, observe and talk with people to get a complete understanding of the social intricacies that were woven throughout the unique culture. They recorded field notes about everything they saw, heard and experienced and at the end of their stay would attempt to describe the lives of these people through the subjects' view in what is also called an ethnography.

Ethnography as a market research tool

In the 1960s, market researchers realized that they had to get beyond statistics and needed to delve deeper into the psyches of people to understand why purchase decisions were made. The focus group became popular as a way to get face-to-face with consumers and try and uncover the psychology of purchase behavior. Many market researchers, though, grew dissatisfied with the technique and began to use projective techniques, such as collages and card sorting, to delve further into the unconscious of consumer behavior.

While these and other forms of qualitative research represented vast improvements over traditional market research, they sometimes painted

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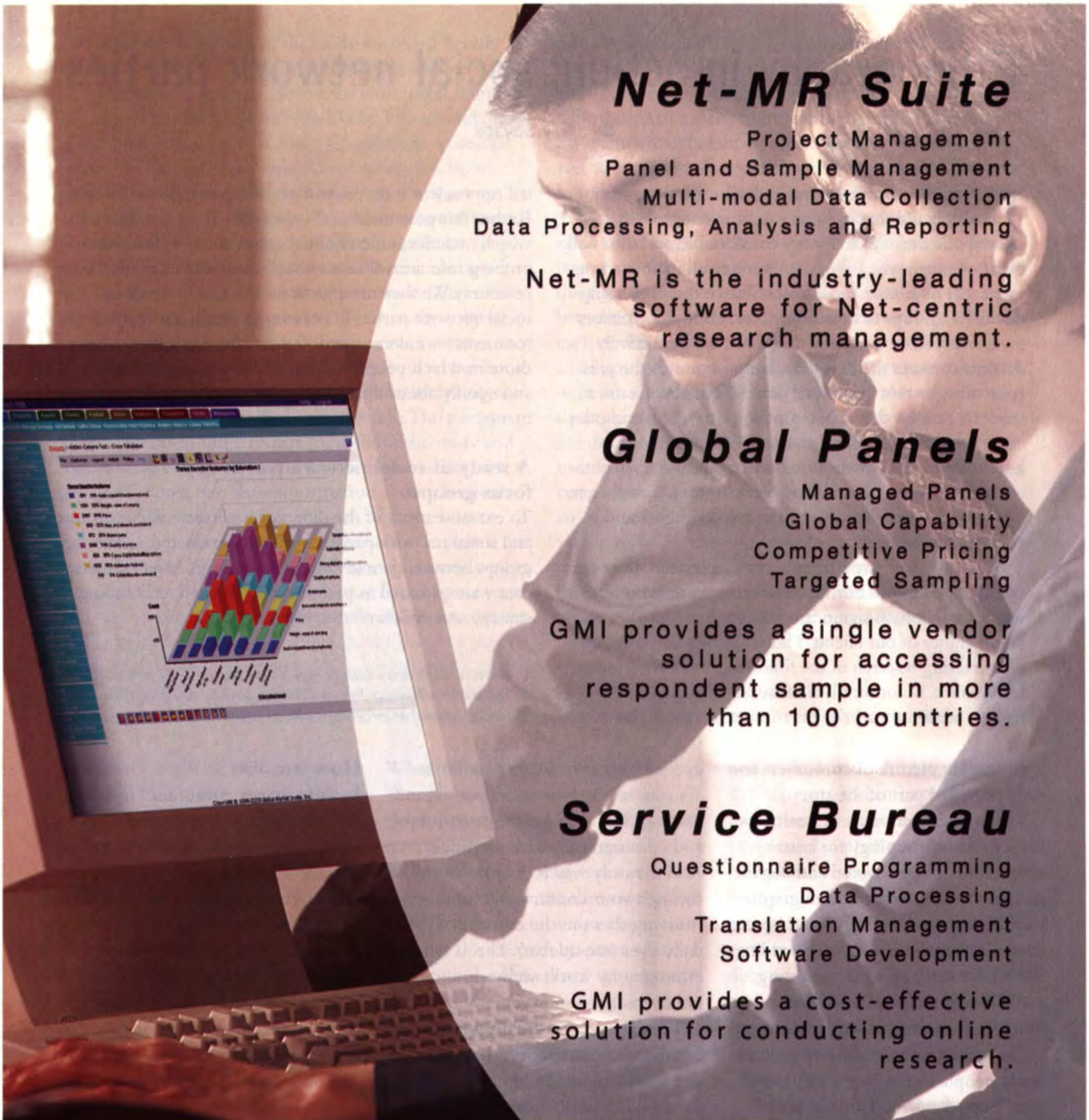
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Ethnography in action: social network parties

By Jerry Savage

It seems reasonable — and, indeed, consistent with research and theory in the social sciences — that respondents will feel more comfortable, and thus will be more open, when they are interviewed in an environment that is familiar and comfortable to them. Holding discussion groups in boardrooms with one-way mirrors — as many firms currently do — not only effectively decontextualizes the behavior (and so removes the presence of important behavioral drivers) but also creates a research context that is not conducive to uncovering the cause of consumer behavior. It is within living rooms, kitchens and retail environments that consumers negotiate the meaning of brands and products and, therefore, it is within these environments that my colleagues and I conduct our research.

In essence, we have made things simpler and more personable so as to position ourselves to penetrate consumer segments that have significant influence on the sales and brand equity of our clients. This is altering the status quo of marketing research in the following ways. Recruiting, for instance, is not simply a matter of hiring a teleservices firm to administer a brief instrument to ensure the potential respondent is representative of the segment of interest. Rather this process takes the form of a brief conversation, which includes some essential questions as well as some probing into areas that are not traditionally examined by recruiters. We then arrange to conduct interviews and social network parties in consumers' homes or retail environments — environments familiar to respondents and those in which people are more likely to talk comfortably and openly about things like value, brands and advertisements.

A study of social network parties and focus groups

To examine some of the differences between focus groups and social network parties, our firm conducted a series of groups between January and June of 2003. Most of these data were gathered as part of a study related to branding strategy and children's nutrition.

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a misleading picture of consumers and only provided part of the story.

In the mid-'80s market researchers turned to anthropology for better methods. They discovered and began to apply the practice of ethnography to study consumers. They liked how it took a holistic approach — providing the whole story of what was going on. Whereas focus groups often worked in artificial settings for short periods, ethnography showed how to study people in the larger context of their everyday lives. This not only exposed what people actually did, but also why — how social groups, cultures and environments influenced attitudes and behaviors.

Over the last five years, the use of ethnography to assist marketing and branding strategy has exploded. Why have companies turned to ethnography?

See the world through their eyes

Reality is subjective in that everyone's view of reality is different. Until you are able to see the world through the eyes of your consumers you don't actually know what value your brand holds and how to get the attention of and communicate with consumers. And the only way to see the world through your consumers' eyes is by studying them in the context of their daily lives (see sidebar). This is when ethnography works well; ethnography uncovers the whole story.

The premise for the need to do ethnographic research is that brands and marketing communications are meaningless until consumers place meaning in them. For example, a company trying to express cleanliness through its products loses market share because many consumers see the products as dangerous chemicals not fit for their household.

In learning what is meaningful to consumers, why people do what they do, and what their unmet needs and desires are, you are able to target your marketing and branding efforts in a way that they are successful in the marketplace.

How it works

In order to see consumers' realities and get the whole story, ethnography employs several methods: immersion, participant observation, and informal and ongoing in-depth interviewing. Careful attention is paid to the words, metaphors, symbols and stories people use to explain their lives and communicate with one another. Ethnographers also help people reflect upon why they do what they do and help them realize their underlying motivations.

Ethnography is capable of delivering powerful insights that can transform a business. Traditional research, working deductively, often only results in incremental change — bigger, better, faster. In contrast, ethnography is inductive, facilitating pure innovation. Instead of testing a particular mindset or idea of the company, a deductive approach, ethnography is the reverse in that it sets out to discover what the issues are prior to making any conclusions.

Ethnography helps to uncover the

During the first phase of the study we relied heavily upon social network parties, one-on-one in-home interviews, consumer collages and intellectual capital acquired through earlier research with the client. The second phase of the project consisted of a host of questions on several brands within the client's portfolio. During this latter phase of the study we relied primarily on focus groups.

To kick the study off, we contacted a mother of two to host a social network party on children's nutrition, shopping behavior and channel decisions. The initial contact was casual and focused on establishing rapport and ensuring the respondent was a good fit for the study's objectives. This effort — and an appropriate cash incentive — let the respondent know that inviting friends to her house to talk with me about things related to the study's objectives would be interesting and worthwhile. The party "host" was given some information about the study and told that we simply wanted to have a conversation with a group of people that share information about children's nutrition. We were then able to work with the host to gather a group of respondents that are active in parent groups and get together to discuss their children as well as schools, local crime and a host of other issues. Some parents were more at the periphery of the social network and so provided an element to the group dynamic that served to ensure some diversity. As is typically the case with groups in which respondents know one another, some respondents assisted the recall of others and, occasionally, respondents corrected one another to make sure that they, to paraphrase, didn't "mess up the research." This group, and other similar groups in phase one of the study, contributed to a clearer understanding of the position of my client's brand identity within specific communities and showed how that identity (and the brand equity tied to it) is negotiated within consumer networks.

A couple months later, my colleagues and I gathered again to conduct a series of groups to build on the findings of the first phase of the study. Part of the purpose of these groups was to explore similarities and differences between focus groups and social network parties and how each of these methods affect top-line research findings and bottom-line business decisions. My primary objective with this element of the study was to explore the group dynamic of each group type and come to a better understanding of what type of groups are most appropriate for specific types of questions. By the end of the project we completed 23 groups, roughly 15 one-on-one interviews, an analysis of 12 collages made by consumers and a cursory analysis of relevant survey research. The multi-method approach put us in a good position to examine the utility of various methods and, more specifically, the utility of focus groups and social network parties for specific types of marketing questions.

Negotiated within networks

This recent work — as well as previous studies we have

meaningful categories, delineate consumer wants and needs, and provide an all-encompassing understanding of your brand's potential to resonate with a consumer's daily life.

The actionable findings can lead to impactful, long-lasting results. Ethnography takes you beyond what you know you don't know, to the area where you discover what you weren't even aware that you didn't know. This is where great brands and marketing programs are born.

What it looks like

The general process of an ethnographic study is to plan, research, analyze, and then create the report. Although ethnography lets the research influence the direction of the study, it must begin with a plan that outlines the research questions that need to be answered and what groups of people the study should start with. It is also important for researchers to understand their biases prior to entering the field.

The fist step of the research is to find an informant. An informant is a participant who can introduce the researchers to a particular group of people and explain the meaning behind the rituals, language and general goings on. After entering a social group, ethnographers keenly observe activities, listen to conversation, conduct ongoing informal interviews and participate in meaningful activities. Interactions are also observed to ascertain the effects of social influence.

Data is recorded in the form of

conducted — has made it clear that the value of products, services and venues of purchase (and many other things) are negotiated within social networks (e.g., groups of family, friends and colleagues) and thus these groups are of particular interest to those who study marketing, economic and political questions. By contrast to the social network parties, the dynamic of the focus groups was contrived. It was simply not the sort of dynamic that average consumers experience on a day-to-day basis and was not representative of the kind of dynamic that is most likely to affect decisions about how to live, where to shop and what to buy. We feel for this reason alone it is indeed clear that the social network party is the superior method for most marketing questions.

Moreover, my colleagues and I have found that exploring group dynamics in a context within which groups of average folks are likely to congregate is critical to the development of accurate and actionable assessments of consumer behavior. It's not surprising to most of us that consumers don't really discuss or decide what to buy, where to shop or how to interpret a concept in conference rooms filled with other respondents who they don't know. Rather, most of us, like our respondents, make such decisions among friends and in settings that we frequent on a day-to-day basis. I must say, it never ceases to amaze me how much money goes into renting focus group facilities with one-way mirrors. Such facilities are so artificial that I'm hard pressed to believe that one could arrive at a generalizable finding based on a study conducted in such a context.

Additionally, the nature of social network parties virtually ensures that the groups will not include "professional" focus group respondents. The problem with these individuals is that they think like the moderator and are quick to offer theories on things like brand identity and corporate positioning rather than simply describing their own behavior. Of course, the purpose of the groups is not so much to get the responses and insight of marketing professionals — or others who are attempting to do that work — but rather to get real consumer insight from average, run-of-the-mill consumers who are representative of the market and/or cultural category of interest. The recruiting method for social network parties allows us to avoid these individuals and also ensures that we don't rely solely on databases of people who have expressed unique interest in participating in marketing research.

Finally, we have found that people are often quite comfortable speaking up in their own home or that of a friend and that the social network groups tend to be somewhat more productive than focus groups because people are accustomed to interacting with one another. The dynamic between respondents who know one another also serves to reduce response error. For instance, where the memory of one respondent may be a little hazy, other respondents knowledgeable about the behavior of that person are able to chime in so that we get an accurate rendition of the behavior of interest (e.g., what brand of vitamins they buy for their kids). | Q

field notes — jotted down in a notebook whenever researchers get a chance — photographs, audio, video, and the collection of artifacts — items that represent particular meaning to the people being studied.

A researcher's own experiences — reactions, feelings, thoughts — are also important data. There are some things researchers can't fully understand until they experience them themselves.

The next step is to analyze and interpret all of the data collected to find themes and patterns of meaning. This is no simple task. Hours and hours of audio and video must be transcribed and re-studied. Even for the well-trained and experienced ethnographer, the amount of data can at times be overwhelming. But through careful and thorough analysis of the data, themes and categories emerge and applicable findings become clear. Ethnographers usually create frameworks to help companies think about their consumers and understand what it all means.

Triangulation, the process of checking findings against what other people say and against similar research already conducted, is a way to verify the accuracy of collected data.

While traditional ethnography stops with the description of the group studied, this is not sufficient for businesses. They need actionable guidelines, recommendations and an outline of strategy. The findings must be presented in a fashion to enable companies and their agencies to create innovative and successful solutions.

Reservations about using it

When thinking about using ethnography you might be hesitant. This is understandable since it's always difficult to break away from tradition. Since ethnography is not the norm, with it comes a certain amount of uncertainty. Here are some answers to the most common concerns.

It's not quantifiable: The real issue

is often whether the findings are reliable and representative — does the data actually resemble the lives of the target audience? Since ethnography focuses on people's real lives, reliability is inherent — you can't argue with what people themselves say and do. Multiple locations and skilled professionals ensure that the findings are representative.

It costs too much: You can't afford not to do ethnographic research because of the opportunities it uncovers and solutions it finds. The return on investment is extremely high.

It takes too long: The length of the project is relatively short compared to how long the findings will directly impact success. And it's far better to spend time gathering information that guarantees results than to spend time collecting information that could be inaccurate and misleading.

It's too revealing: Ethnography can sometimes disturb the relief that managers seek. By introducing ideas about human choice, emotionality and context, studies can sometimes replace simplification with complexity. If a company can promise actionable findings and an easy to understand report, it's worth it. The sooner you get the whole story, the sooner you can make things right.

Applying ethnography to marketing and branding strategy

Ethnography has almost reached a fad status in market research. The problem is that not all that is proclaimed to be ethnography is. Numerous firms without any experience studying or practicing ethnography are adding it to their list of services.

You may have read recently about retail ethnography, where companies track every move a consumer makes in a store through computer surveillance. While plenty can be said about the merits and ethics of such research, be aware that it is not ethnography in any sense of the word. Observation alone is not good enough to base your company's strategy upon.

While there is some value in simply observing consumers, conducting one-hour interviews, or stopping and asking consumers a few questions while they are shopping, these methods alone do not provide the whole story and can not be substituted for ethnography.

When you decide you want to get the whole story and want to hire a firm to conduct ethnographic research for you, check to make sure they received graduate-school training in ethnography and have helped similar companies apply the findings to increase the bottom line. If they say they can do an ethnography in a week and deliver results, be very skeptical — even very well-trained and experienced ethnographers need at a minimum of a few weeks to get more than very shallow findings. | Q

qualitative research

Getting more golden eggs without killing the goose

By Cara Woodland, Arnold Spector and Robert Morais

In Aesop's fable about the goose that laid the golden egg, the goose's owner became impatient waiting for each golden egg to be laid so he killed his goose, anticipating that her insides held solid gold. Instead, he found only her internal organs. The man's impulsiveness ended his ability to get more golden eggs and ruined his life.

For certain business organizations, the goose and the golden egg is a metaphor for a marketing fear. Companies whose success is based on a single brand are worried that any attempt to line-extend that brand — get more eggs out of it — will cannibalize, diminish or even end its golden life cycle. Their approach, defined by Ricky W. Griffin in the *Fundamentals of Management* as a single-product strategy, can sometimes be effective. Conversely, it holds significant risks, especially if customer needs change or the competition is more aggressive in the marketplace. It can also stunt the growth of a brand that customers would be highly receptive to purchase in other forms. The question for apprehensive companies considering moving away from a single-product strategy is how to do so without killing the brand that has yielded so much gold over the years.

To innovate or not

A major manufacturer of global consumer and household products faced this problem. For decades, this company marketed a well-recognized brand name with strong customer awareness and chose not to line-extend that brand.

Suggestions on refocusing innovation

Management was torn. They were concerned about diluting customer perceptions of this "icon" brand but they were faced with competitors increasingly encroaching upon their territory and the product line was losing share of market. Should they innovate and expand the brand name to new domains or continue their single product strategy and hope their brand retains its market share? In the past, the safe choice seemed to be a holding pattern; now the loss of equity was becoming too great a threat. Ultimately, management concluded that they wanted to better understand customer perceptions of their brand and identify what, if any, new products could be introduced under the brand umbrella.

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In order to break their paralysis, management chose a two-phase process, combining research and new product ideation. The research phase drew upon the technique of applied ethnography. When applied to market research, ethnography involves entering into the end-user's natural environment — home, shopping setting, or place of employment — to gain a more realistic understanding of their attitudes, behaviors and needs, and to better comprehend the context of product use. Innovation Focus Inc. was asked to field an ethnographic study that helped this organization's management grasp their customers' perception of the icon brand. Phase II of the project would use this understanding as a springboard to develop potential new products that would increase their brand's market penetration. Innovation Focus, working closely with marketing and advertising members of the team, designed a process that would allow the organization to participate in the ethnographic research, take ownership of the insights and develop potential new product ideas.

Show the reality

The value of ethnography was its ability to show the organization customer reality rather than customer reconstruction from memory via a focus group or survey. Sites were selected through an intensive process of a recruiting screener, pre-site visit homework and a phone interview. Research teams were designed to be cross-functional and experiential, with team members from the sponsoring organization and its advertising agency participating actively in the site visit while a trained ethnographer led the respondent interview. This approach provided the organization with real-life experience with their customers and made the field team more connected to, and responsible for, representing their customers' needs.

On-site observations produced insights that could not have been generated otherwise. For example, during one site visit, the field team visited a custom printer and observed that his technician, who had a variety of similar products at his disposal, chose the brand that was closest to him. When asked why, the technician explained that this brand was most convenient and that he did not want to take the time to walk across the room to get another brand, even if it might yield a better result. This simple comment was an eye-opener to the marketing team; their icon brand was not worth taking the time to walk 10 extra steps!

Data analysis

The goal following the research was to amass recurring themes and key insights, and then determine which of the themes and insights were within the company's strategic focus. Themes from the research were determined through clustering the research data and then defining the top customer needs, drivers and motivators. From the ethnography, the organization received resounding permission from the consumers to extend the brand line. Indeed, customers expressed an expectation of the company to expand the brand and were surprised that it had not yet done so. Based on this finding, the organization determined that new product expansion was essential to avoid long-term share-of-use erosion. The organization received the needed assurance that there was an opportunity, and a safe one, to expand its golden brand beyond its current single product line.

Insights into action: the innovation session

The next step in the process was to create new products and marketing strategies from the research insights via an innovation session. A cross-functional team was brought together to participate in the brainstorming process. This team included the field researchers, external marketers, consultants, new product development professionals from non-competing industries and creative people from within the organization representing multiple functions. Those involved in the session were consistently reminded to focus on the customer through the use of customer profile sheets, which encapsulated each site visit into a one-page overview of findings. Additionally, the session centered on ideas which would be consistent with the company objectives while also protecting or extending the icon brand's equity.

The session was divided into two parts. The first segment entailed a large group exercise to brainstorm beginning ideas and concepts for products. The second part of the session consisted of a smaller core team from the sponsoring company to sort through the ideas to create a portfolio of platform areas and appropriate next steps. The large group session produced hundreds of seed ideas and concepts enabling the small core team to isolate 11 key platform areas to move to the next stage of development.

The innovation session was more practical and productive because ethnography was completed beforehand. The ethnography provided the targeted themes and insights upon which new product ideas could be built. Additionally, the sponsoring company's participation in the research and analysis led to ownership of the research insights and a responsibility to represent real customer needs.

The outcome

Since the innovation session, the company's management has shown intense interest in expanding the brand. The session's platform areas are now in further testing and development.

From the beginning to the end of the project, the organization learned a number of valuable lessons. The team discovered the value of having a well-documented, actionable process for implementing research results before entering into the field. The step-by-step process gave them the freedom to focus on the important phases between the beginning and end product rather than trying to jump immediately to the end product. Combining ethnographic research with the ideation and concept generation process produced an end result of greater breadth and value because ethnography yielded a more informed way to be imaginative in product idea generation.

Throughout the project, the team learned the value of nurturing the process rather than focusing on the end result. Most importantly, the project helped overcome corporate paralysis and reassured the sponsor that their beloved goose could lay many golden eggs and that both their company and their golden brand would be safe from harm. | Q

Geography matters

How 10 popular markets can affect your focus groups

By Pamela Rogers

"Where should we do the focus groups?" Before any qualitative project begins, this seemingly mundane question is asked and answered. Yet marketers often give this question minimal attention in the fast-paced scheme of focus group planning. Markets are sometimes chosen based on such random rationales as convenient plane schedules, client attendance at a convention in the area, or tie-in with a family vacation. Other projects end up with a proverbial threesome of east, west, and middle-of-the-country markets in an attempt to obtain geographical "diversity."

But there are many types of diversity, and they are not all based on a compass direction. Popular focus group markets are unique and, rather than being representative of a section of the country, are actually representative only of themselves. For example, doing groups in New York City does not mean that you have the East Coast take on the issue. Along with New York, a researcher might choose Los Angeles as a second market in order to examine geographic differences. However, choosing another eastern market such as Philadelphia or Boston may yield results just as different from New York as those in Los Angeles

So if geographical dispersion isn't the holy grail of focus group decision-making, what is? Focus groups are not statistically significant, so choosing your markets can be partially based on the types of people you want to talk to, or at least the types of people who seem to come to focus groups in that area.

We moderators have a unique perspective, because most weeks we spend hours talking with people across the country. We have in-depth discussions with them about typically superficial subjects, and we're paid to understand and explain what makes them tick. So with a lone moderator's perspective, I present 10 frequently-used U.S. focus group markets from east to west. The qualitative, sometimes-tongue-in-cheek assessment is based on years of focus group experiences both good and bad. Take your pick and enjoy the journey.

New York City

Do you want your groups smart, fast, on-trend and no-nonsense? Don't rule out New York groups, as some clients do, with the mistaken thought that New York is not mainstream enough. New Yorkers

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demonstrate what will soon enough be mainstream. Flyover zone rumors to the contrary, New York groups are not rude. New Yorkers show up, are professional and savvy, think fast, and answer your questions before you ask them. New York groups are easy on the moderator because there's no teeth pulling, no need to pressure participants to say what they think or give opinions. The only caveat is that, because of the abundance of advertising and marketing firms based in New York, NYC respondent opinions are much in demand. Do some extra digging with your recruiter to weed out the pros.

Boston

That lovable accent is combined with a mindset uniquely their own, a little offbeat and definitely not the same as anywhere else. They are simultaneously conservative, liberal and contrarian. Choose Boston for a quirky taste of nonconformity, a mindset tweak that will creatively redirect your thinking from humdrum to "Gee, I never thought of that before." They're cerebral, high-tech, and of course, well-educated. Recheck your concepts and handouts for typos or illogical thinking; Bostonians don't suffer fools gladly.

Philadelphia

Straight shooters with attitude. They get right to the brass tacks and nitty-gritty of your research issue. An earthy, blue-collar sensibility abounds across socioeconomic classes here. They love to argue and play devil's advocate. They like to talk over one another, so moderating a group in Philadelphia is a bit like wrestling an alligator. Unlike in those markets further west, don't even try to sell them on the healthy, good-for-you angle — slather it with meat and cheese and they'll eat up your idea. (Update: The above caveat is in effect despite the recent slim-down, get-healthy crusade spearheaded by the mayor.)

Charlotte, N.C.

Charlotte is not on everyone's radar screen for groups, but it should be. The best talkers and storytellers around come to focus groups here. If you're looking for pithy, homespun quotes for your video presentation, make a stop in Charlotte. They craft lengthy, amusing, endearing stories about any product you can imagine, and give it to you all tied up with a perky bow. They are endlessly nice, polite, mild-mannered tale-tellers, and I dare you to not leave the group with a southern accent and a smile on your face.

Atlanta

In Scarlett's day Atlanta was quaint hoop skirts and iced tea, but of course it's big-time cosmopolitan now. Respondents are still well-mannered and polite, with traditional family values, built-in Southern civility, and a strait-laced view that can be death for an overly-sexy or sacrilegious commercial. You won't find Atlanta groups talking over one another or being otherwise unruly. Atlanta groups are also among the most well-groomed and well-dressed anywhere, with a mainstream, Ann Taylor-meets-Lands' End fashion sensibility. Your group videotapes will look polished. They have low levels of mean-spiritedness (at least until they start driving on crowded Atlanta highways), so you might have to prod those "dislikes" out of them. A client and I once left Atlanta thinking an advertising campaign was the greatest thing since Mean Joe Greene. In other markets we discovered it was only Southerners being nice.

Chicago

No nonsense here. Check your bull at the door and don't dilly-dally. They'll tell it to you straight, like Philadelphians without the ruckus. They're not given to wild leaps of pie-in-the-sky abstraction or ready to hop on any old bandwagon that comes along. Presenting "just the facts, ma'am" works well here. Chicagoans provide those much-needed meat-and-potatoes responses, and they exhibit doubting, "show me" behavior as much as those from Missouri. Do your reality check in the Windy City, especially the burbs where you get down-to-earth squared.

Dallas

They're yarn spinners, but don't try to pull the wool over their eyes. I once presented an advertising idea in Dallas and was met with "Do I look like I was born yesterday? You honestly expect me to believe that?" They're honest, practical tough talkers who will tell it like it is wrapped in a funny story and a twang. They don't give a fig about political correctness, but get very jazzed about ideas that promise personal freedom and independence. Don't rule out Dallas just because you already have a southern market in your mix. Dallas "southern" is not Atlanta southern, for example, and it will add yet another piece to your U.S. patchwork quilt. Be ready for groups that run long in Dallas as they chat and chat and weave their Texas tales.

Denver

Health-conscious, physically-active pragmatists with a bit of quirkiness on the side. Leave the glamour products and drama at home, thank you very much. If it's not natural, outdoorsy or soy-based you can watch their eyes glaze over. You'll have laid-back, toned, earthy types — low on make-up, designer duds, irrelevant chit-chat, and fist fights (see Philadelphia). Denver is good for anything related to healthy lifestyle, adventure sports or high-tech, with mega doses of tech-savvy types. No artificial ingredients allowed.

Los Angeles

Lots of actors here who like to play a role for the camera behind the glass, or entertainment types who consider product advertising a lower life form compared to their art. Good facilities will sift them out for you if you ask. Groups here are ultra cool and jaded about new ideas; it's difficult for them to admit they actually like something. Don't be discouraged if they don't jump up and down about your idea. They have a "been-there-done-that" attitude and are hard to please. If your product or idea goes over well here, you probably have a winner.

San Francisco

In this sophisticated bay city, your products must not only be organic and pesticide-free, they must save the whales and be otherwise politically correct. San Franciscans exhibit higher-than-average levels of aversion to marketing and advertising in general. Also, few San Francisco respondents will admit to participation in a lower-level brain activity like watching TV, so testing commercials can be a challenge. One San Francisco respondent went off an angry tirade about "manipulative" marketing when I attempted to get his reactions to a commercial. Test the "p.c." quotient of your products here and you won't go wrong.

Off the beaten path

And finally, I'd like to put in a word for the more obscure focus groups locations in America, the ones apart from the major metropolitan areas listed above where, of course, most people don't live anyway. Those off-the-beaten-path places often provide truly fresh learning, from respondents who actually haven't been to a focus group in a year, if ever; respondents who enjoy the experience as much as the incentive. I've had surprisingly unique research experiences and quantum learning in places many marketers dare not venture — Harrisburg, Pa., Gainesville, Fla., Spokane, Wash., San Antonio, Texas, Albuquerque, N.M., Birmingham, Ala., San Jose, Calif., Grand Rapids, Mich., or Cheyenne, Wyo. And you might discover edgy glimpses of the future in trendsetting markets like Portland, Ore., or Austin, Texas.

The far-flung places might require a bit more travel time, but are worth the adventure in the long run. No, they're not representative of a region, but is any place? So why not explore a bit? You'll either find something totally new, or realize that we're all more alike than you ever imagined. | Q

qualitative research

Trends and tribulations

By Louise Kroot

Roundtable participants outline issues facing the industry

Dynamic discussions highlighted the industry roundtables held in Los Angeles in September during the American Marketing Association's annual marketing research conference. These sessions were designed as a forum for industry professionals to discuss some of the most sweeping changes to impact the industry in its 100-year history. Sixteen professional moderators, led by the author, guided these groups, each one focused on a specific industry: consumer packaged goods (CPG), health services, financial services, automotive, high-tech and communications, and public policy, and groups that concentrated on issues facing the travel, leisure, entertainment and restaurant industries.

Competitors, industry veterans, conference speakers and newcomers to the marketing research industry sat elbow to elbow in these sessions, openly and energetically contributing to the discussions. Though many of the concerns relating to the marketing research community were repeated across all industries, others were much more industry-specific, as the following commentary reveals.

Industry changes

• Reduced budgets: Budget squeezes — resulting in smaller research departments, fewer projects, and less money to implement research plans — are prevalent in all industries, but are particularly acute in the travel business. Downsizing of research departments and management turnover are disrupting long-term strategic thinking, as well as sacrificing quality. (*"It's hard to get our requests met." "We need suppliers to cut costs, but vendors may be compromising quality." "Our clients demand research that is 'better, faster, cheaper'." "We are doing more research in-house." "We are now more reactive, than proactive." "How long can we sustain a premium product?"*)

Some blame the shift away from the research dollar to the need to generate new revenue sources, as evidenced by massive construction in the health care industry, and the development of new products, affiliates and partners in the travel arena.

Adding to the stress of reduced budgets, CPG researchers face the need for even more funds to cover additional segmentation requirements, necessary to better represent the rapid and simultaneous growth of several ethnic parts of the population. Similarly, automotive compa-

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nies are confronting the need for more research because so many new models are being introduced.

• Lack of corporate strategy: Marketing research tools have low credibility in too many companies. Often plagued with an "old school culture," which sees no need for, or has a limited understanding of, the benefits of research, researchers have difficulty convincing those at the top, those in control of the purse strings, as well as brand management about the value of research. (*"People defend their 'belief' systems, rather than being open-minded about research." "They fail to see the big picture." "Long-term strategic research is meaningful, but is harder to sell than tactical." "It's hard to get them to be innovative."*)

Poor decision-making experiences are frequent. Too often products are forced into the marketplace without the benefit of any research at all.

Even when research is conducted, decisions are frequently made either too early or too late in the process. (*"Brand executives and upper management form and begin to act on hypotheses even before they receive the results of the research." "Companies get bogged down with too many other issues to be able to act on the findings of the research in a timely manner."*) Some only want to hear the "good story," and ignore unfavorable research results.

Various automotive companies face the additional problem of foreign cultures whose involvement can greatly slow down the entire process. Financial service companies have to deal with a very sluggish, conservative decision-making environment because of the extra caution required from the regulatory culture that characterizes this type of business.

• Declining respondent cooperation: Diminishing respondent cooperation rates affect all industries. At a time when budgets are being squeezed, the cost of lower response rates is particularly crippling. In some industries, like health care and high-tech/communications, frequently used respondents are becoming "burnt out" and difficult to replace. (*"Respondents have been over-sampled and over-researched." "We are hitting the same respondents over and over." "There is more competition for medical doctors among research companies, and the response rate from specialists is way down."*)

• Time constraints: A demand for faster research results is most severe in the CPG, automotive and high-tech/communication categories. though other industries also face some of the rigors of needing immediate results. Researchers complain about a lack of time for productive kick-off meetings, inadequate time for clients to change objectives, and a failure to conduct research early enough in the product cycle to avoid having to make last-minute decisions. CPG companies are particularly affected by too little time allocated to handle the additional ethnic segments that are becoming necessary in their research design. For some, sign-offs take much longer than in the past, adding to the burden of shorter time cycles.

• Legal restrictions: The Do Not Call program is expected to create additional obstacles for researchers, and legal departments have increased scrutiny regarding issues of ethics and privacy. Some companies rely on their sales forces to access customer data, while health services researchers have the complicated HIPAA regulations, which prevent them from generating customer patient lists for research purposes

Gaining management buy-in

Developing a better alliance with management is the most important solution offered by these research professionals. (*"The top priority solution was the 'total project concept,' getting everyone to understand the parameters and goals right from the start." "We need to get a champion in the executive office."*) Collaboration should include supplier partners, as well as upper management, marketing, and, where applicable, engineering. (*"There should be an annual meeting where researchers and management meet to plan out the year's research needs." "We need to be consultative with our clients, not just order takers."*)

Applying the principles of marketing to the promotion of research is clearly necessary in companies where the corporate culture is research resistant. (*"Treat it just like you would if your were going to market any other service entity." "Become an internal evangelist for the role of research within your organization." "Educate your clients." "Expand your role to become more than a researcher."*) Including action standards in the research plan will help all stakeholders buy into the process. The results of these efforts will be better, smarter decisions, less reactive and more proactive research, and research earlier rather than later in the process.

The most effective tool for developing management support for the research process is to demonstrate how the implementation of research findings will impact the bottom line. (*"Use ROI to show clients the value of research." "Have clients consider that it's worth spending $30,000 to make sure that an upcoming expenditure of several million dollars is a sound decision."*)

Others champion the communication of anecdotes and success stores to support a research proposal, while some resort to "mini scare tactics," diplomatically suggesting the kinds of negative consequences that might occur if the research was not conducted.

Methodology opportunities

The advent of online research is really a mixed blessing. On one hand, online research can deliver quantitative data faster and cheaper, and in a more convenient format. (*"It gives us real-time data." "It dispenses knowledge, and empowers people with information." "It's more resourceful and has forced executive teams to get to a decision point and make them."*) Online research also helps the researcher control individual stimuli shown to respondents, provides the use of a variety of multimedia options, is easier to draw samples of low-incidence population, and enables respondents to answer on

For further information about these groups, contact any of the moderators listed below:

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their own time, in a non-intrusive setting.

On the other hand, the easy availability and do-it-yourself culture of online research provides non-research staff a convenient device to conduct ill-designed research on their own. (*"Watch out! They can do their own conjoint analysis."*) Issues of privacy, spam, sampling limitations (respondents who are overused and/or not representative), and limited bandwidth are concerns that are yet to be resolved. Some client types want to use online whether it's appropriate or not, just because it sounds cutting-edge.

Using qualitative techniques online is also debatable. Those who like this methodology are influenced by the potential for lower-cost research, and because it enables executives, from the comfort of their own offices, to hear the voice of the consumer. Some believe that the anonymity provided by online qualitative research encourages respondents to be more candid, though the lack of non-verbal gestures and facial expressions is a major trade-off. Nevertheless, in order to make sure that people remain engaged in the process, the researcher must conduct some sort of an exercise every few minutes, (e.g., voting).

New types of concept testing are desirable, namely one that could actually predict sales, and another that could present virtual online tours of a venue, useful in predicting casino or hotel visits.

Overcoming respondent resistance

In order to address declining cooperation rates, researchers believe that shorter, more enjoyable surveys, conducted by better-trained interviewers would help greatly. Some wish for research facilities to be redesigned to make the survey experience more stimulating.

Using custom panels, loyalty panels or customer advisory boards is another solution to help cope with the declining respondent cooperation rate, as well as locating low incidence respondents. (*"Response rates are higher than without a panel, so over time, it will also reduce costs."*)

And finally, innovative incentives, like free anytime minutes from a wireless company, are helpful in obtaining cooperation, especially appropriate for the more educated, sophisticated respondent.

Next steps

Reaction from the roundtable participants strongly indicated that the time spent was valuable, and that more of these types of interactive sessions should be included in planning future conferences. Attendees appreciated the opportunity to interact with their colleagues, and felt encouraged with some of the important insights they were able to take away from the discussions. | Q

Thinking of focus group participants as collaborators

By Mike Flynn

How many times have you sat in a dark room looking at eight to 10 people on the other side of a one-way mirror and thought, "These people know too much. I wonder how many times they have been in a focus group. Where do they get these terms like 'target audience' or 'copy'?

It's tempting to blame the recruiter for professional respondents. Or perhaps the respondents lied to get in. We have all seen it happen. And we want to point the finger someplace.

But perhaps we are fighting an uphill battle. The fact of the matter is we are living in a much savvier world than when focus groups were first being used. Indeed, the term "focus group" has become part of the everyday vocabulary. We hear the term used by the media and political aides. We see focus groups parodied in editorial cartoons. We know that they help select what a candidate will say in a speech and how a movie will end. We might also be aware that they are used to try out legal arguments before a case ever makes it to a courtroom.

When I tell people at a cocktail party that I moderate focus groups, I do not need to give further explanation. Although they might not have participated, they know the general concept.

Focus groups and their major variations (IDIs and mini-groups) have become a part of the mainstream, not only of marketing and public policy research, but of the working knowledge of the reasonably well-informed.

Ask them to collaborate

We cannot move back to the days of naïve respondents. Indeed, the word "respondent" is passé. A better word, now used more often, is "participant." So rather than treating people as subjects to be observed or as unsophisticated reactors to questions the moderator poses, we ought to ask them to collaborate in our investigation.

Now this means that we might need to think differently about focus groups. As most marketers know by now, focus groups are not the place to take votes on a new product, an ad, or anything else. I like to think of qualitative research, and focus groups in particular, as a dialogue with people who have some firsthand experience with the subject in question. It is a forum for finding useful ideas. It is a conversation with people who have a perspective on a topic, one different from our own and one that deserves to be heard.

To assume that focus group participants are unsophisticated is to be arrogant. They have more knowledge than we do about their own experience. That is why we tell them that there are no right or wrong answers. So we need to respect them and solicit that knowledge. As

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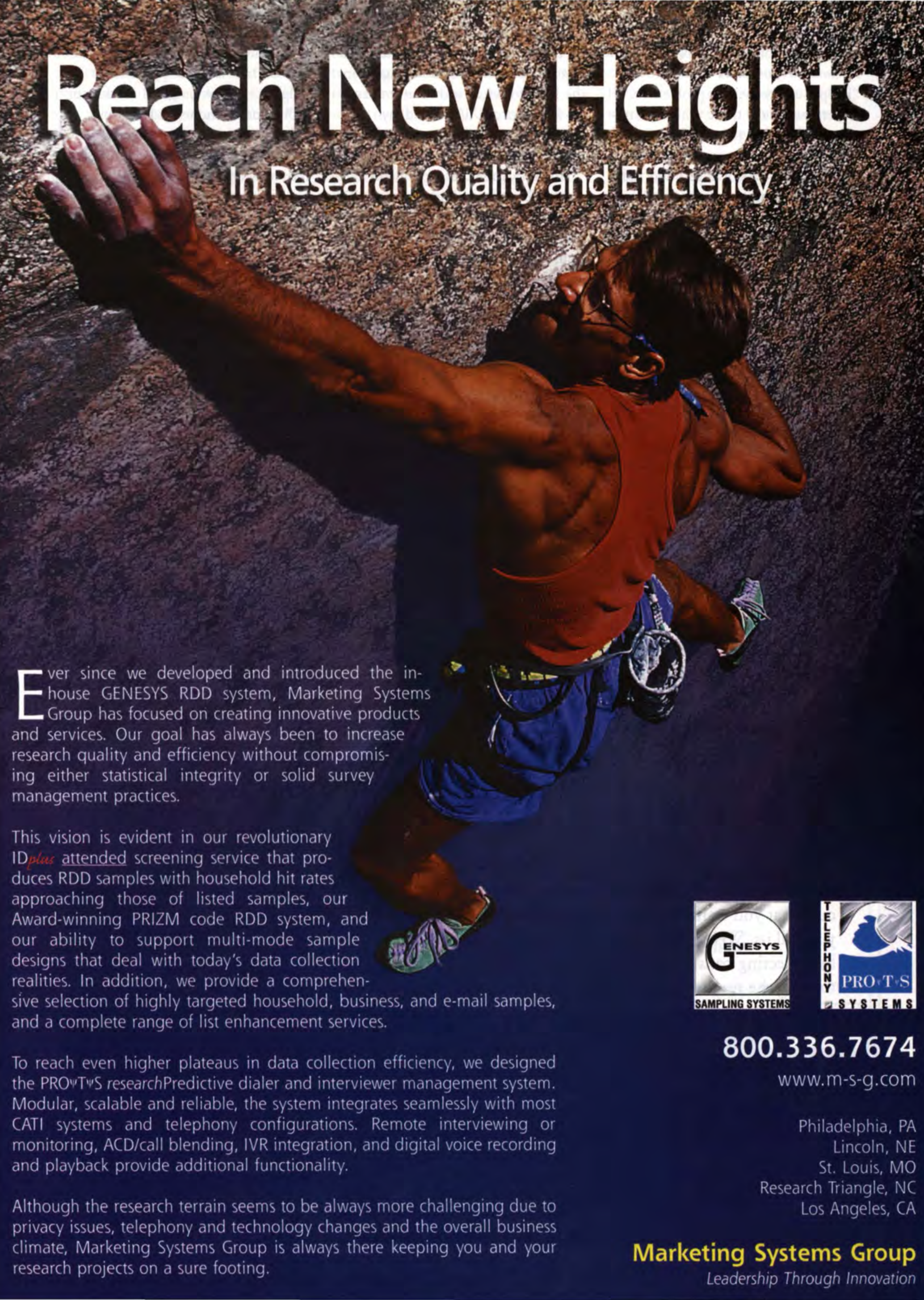
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Wendy Gordon says in *Goodthinking: A Guide to Qualitative Research*, "People can be willing problem-solvers, especially those who have relevant experience to contribute."

How, then, do we engage participants in problem-solving? There are a number of contexts in which we conduct qualitative research where we already ask participants to help us:

• interactive workshops where we ask people to experience the product and help us make it better,

• creativity groups where we use people in ideation sessions, or

• accompanied shopping trips, where we ask people to think aloud as they shop.

Other contexts

We can learn some principles and tips from these other contexts for qualitative research that we can apply to focus groups.

The first is attitudinal. Good moderators have respect for participants as individuals. When we think of participants as collaborators, our attitude is a bit different. The moderator needs to treat the participants as colleagues in the hunt for ideas and solutions, as co-investigators. We should say implicitly, "Come let us explore together."

Ah, but you say, "Respondents can't do this. They haven't been trained." To be sure, not every participant will provide brilliant thoughts or observations. But many can, and we ought to expect contributions from everyone. A great deal of research in schools and the workplace has shown that people live up to expectations. If we expect helpful ideas and perspectives, we are more likely to get them.

Rethink roles

We also need to rethink the roles of participants and moderator. If we allow and encourage participants, they can take on the role of problem solvers of marketing issues. The thought might make some people cringe. We often have heard unsolicited comments from participants about new product ideas or how to improve copy. These kinds of comments can be way off base and not particularly helpful. However, a good moderator will want to understand what is behind a particular suggestion. Oftentimes we will get real insight into how a particular target is experiencing a brand by the kinds of suggestions they make about marketing issues. If we ask for suggestions, it will increase our chances of understanding how a target experiences a brand and we might even have an idea or two that we can actually use.

Another role participants can play is that of observer. If we think of each participant as an embedded reporter, we have that many more eyes and ears available to us. This is particularly helpful in developing hypotheses about market segments. Not too long ago I was moderating some groups and asked them about the different kinds of cooks (home cooks, not restaurant) they knew. From their responses, we were able to develop a typology of cooks that seemed intuitively correct. Of course, it needed quantitative validation, but it became a framework for how the client thought of the market.

Or one could ask veterinarians about the different kinds of pet owners. Or service station operators about how people treat their automobiles and get them serviced.

Participants can also be helpful observers of behavior. In a recent project where we were investigating a brand of children's toy, we asked mothers how the children played with the toy at home: the kinds of games, who else played, how they used their imagination, how often they played with the toy, where the toy was kept, the name of the toy and so forth.

Of course, we more frequently ask people to report on their own behavior. One way to do that is to ask them to keep a diary for a week or a few days before the group discussion itself. Several years ago, we did a study of teens where we asked them to keep a diary for a day. We distributed the assignment so that some participants kept track of their time on a weekday, others on a weekend day. The diary was divided into half-hour increments. They kept track of what activity they were doing and what media they were using throughout the day. The diaries then became fodder for the discussion in the focus groups. One interesting finding from the study was that teens viewed music itself as a medium, regardless of whether they hear it on the radio or a CD. This is certainly consistent with the popularity we see today of MP3s and file sharing.

Another role participants can play is that of interpreter. An advantage to collecting comments on an easel pad is that we can refer back to what people have said throughout the course of the discussion. There are two ways this can be helpful. One is that it can help the moderator clear up any inconsistencies in participant comments. An oft-used technique is for the moderator to say, for example, "Well let me check. [referring back to the flip chart] Earlier you said that you thought of this brand as old-fashioned, but now you are saying the colors on the label are bright and more up-to-date. Help me understand this." The result is that participants end up interpreting their own comments.

The second way participants can be interpreters is in finding trends or themes. Say the moderator has collected likes and dislikes at the easel. To use the participants as interpreters here, the moderator simply needs to say, "Do you see any trends or themes in these likes or dislikes?" This kind of interpretation can function as a kind of projective technique where what we are really learning is how participants organize their thinking about a particular issue. It helps us understand the meaning that people bring to things and that, after all, is an essential purpose of qualitative research.

Moderator takes a different role

When participants are viewed as collaborators, the moderator ends up taking on a different role. Rather than being the conductor of the orchestra, the moderator becomes more like the concertmaster, having a leading role, but participating in the process. This new role may be uncomfortable for some moderators and it might also make for less entertaining viewing from the back room. However, participants will be more comfortable and their comfort is more likely to lead to revelations.

Up to the analyst

Of course, it is ultimately up to the analyst to put all of the participants' comments into perspective. Regardless of how sophisticated participants are, we cannot assume that everything respondents say can be taken at face value. Just like other qualitative data, the contributions of participants as collaborators need to be interpreted; the gold needs to be panned from the mud and rocks. A good moderator will do exactly that. | Q

Bring it to life

Use video to enhance your qualitative research

By Ian Fureman

Little has been written about the merits for marketing professionals of selecting a research supplier that can produce a professional-quality video record of their qualitative research sessions. This article outlines the value of developing a video/market research partnership and describes some video deliverables possible through such an arrangement.

Expectations are increasing

The audiences for whom your research videotapes are intended are media savvy marketing professionals whose expectations regarding the technical aspects of video production are increasing. Therefore, they will expect to see programs that are similar in quality to current broadcast television programs. Competent video producers understand the range of factors that contribute to a broadcast-quality video, including shot composition, lighting, video and audio quality, audio level and pace of editing. They have the ability to gather usable video footage in a variety of situations including outdoor settings (for establishing shots or "man on the street" interviews), indoor product usability demonstrations (laboratory, pharmacy, physician's office) and one-on-one testimonials or small-group discussions. They recognize the role of visual elements such as graphics and on-screen text in communicating information. By producing broadcast-quality video programming, you increase the chance that the eventual audiences for the videotape will be able to focus on the content of the program, not its technical features.

Another reason to gather professional-quality video footage is that the raw video material can be edited to produce many different programs. For example, video findings resulting from one project may be edited into executive summaries for upper management, full-length programs for your market research clients and sales training tools for sales managers. Upon request, a professional video producer will catalogue and copy your footage onto a compact disc so that you can search and view individual segments. In addition, they will store the master tapes so that they are available for many years.

As an example, several years ago a qualitative research group at the University of Pennsylvania produced a videotape to educate injection

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1266 East Main Street Stamford, CT 06902 • 1-800-433-8128 option 6 • www.focusvision.com drug users about the risks and benefits of participating in a government-sponsored clinical trial for a preventive HIV vaccine. Based on the recommendations of the participants, the program was shot in a talk show format, in which a studio audience of injection drug users asked unscripted questions of a panel of experts involved in the clinical trial. Although the edited program was used as originally intended — to educate injection drug users about trial participation — trial planners viewed the unedited footage of the injection drug users' questions to better understand the concerns of the injection drug using community. The knowledge was used to foster a more productive relationship between the trial planners and trial participants within the injection drug using community.

Insights into attitudes

As a market researcher, you should make the most of any opportunity to provide your internal marketing, sales and upper management clients with insights into the attitudes and behaviors of their customers. The better your internal clients understand their customers, the more equipped they should be to address their needs.

The strengths of video are different from the strengths of the written word. For example, although one is able to communicate detailed information with text alone, video conveys added emotion more effectively than does the written word. Therefore, consider using video in situations in which the emotion with which respondents express themselves about a topic provides unique insights to the viewer. In addition, in a case in which a customer's experience with a product would be more easily understood with a visual component, consider using video.

For example, it is not uncommon for a pharmaceutical or biotech company to request exploratory research that assists it in understanding the market potential within a particular therapy area. It may request that physicians be queried about the products they most typically use within a particular clinical setting (emergency room, dialysis unit, transplant unit). Video effectively captures how the physicians convey their knowledge and attitudes about particular therapy areas. Nonverbal cues may suggest excitement, exasperation or resignation with current or proposed treatment options. Further, visual images of the setting in which medical decisions are made could reveal important insights into possible attractions and barriers to use of the product. For example, the amount of staff activity and physical space within a dialysis center may present practical barriers to the use of a product that are different than those that exist in other settings. Medical professionals who work in these settings every day may not think to describe the dialysis center setting during an interview in a focus group facility. However, the images are part of the story included within a videotaped site visit. Video may be used to capture the procedures themselves with which physicians are engaged. Finally, through the use of text and animation within a video, technical information about a therapy area can be conveyed.

Video ethnography

Ethnographers recognize that customers are not always aware of the behavior they engage in when using a particular product. Therefore, much can be learned through direct observation of customers using the product. We recently completed a qualitative research study in which video was used to capture the ways in which families incorporated the use of a pediatric medical device into their lives. The project involved both loaning video cameras to families to shoot home videos of the use of the device as well as on-camera interviews with family members conducted by our staff ethnographer and video producer. The manufacturer gained a great deal of insight into the variety of ways parents and their children used the device. In addition, the manufacturer became sensitized to the amount of guilt and frustration experienced by the parents of children who suffer with the disease. Available to the marketing team as a valuable market research deliverable, the raw video footage will be edited for sales training and motivational purposes.

Video is useful in documenting the development and evaluation of sales and promotional materials such as journal advertisements, sales aids and sales education tools. In iterative testing of promotional materials, video provides a record of the promotional material or sales aid as it evolves, as well as the reactions of the physicians at various stages. Further, video may be used for sales training purposes, to document sales representatives' presentations of finished promotional pieces to physicians in their offices.

Bring them to life

To bring research results to life, market researchers must devote the same level of energy to presenting the results to interested parties as they have traditionally devoted to selecting appropriate methodologies. The technology is available. The selection of a market research supplier capable of producing professional video deliverables will insure that the technology is used in the most cost-efficient and compelling manner possible.

When presented with certain strategic and tactical marketing challenges, more and more corporate marketing researchers and brand managers look to consultants who are skilled at blending professional video production with more traditional research solutions. Internal clients (marketing and sales managers) who are basing million-dollar decisions on their research findings find greater confidence and comfort because the professional video has that special touch of reality. Make it a point to investigate the benefits of working with a market research supplier that uses professional-quality video to provide another perspective on qualitative market research. | Q

qualitative research

Define and refine

How focus groups can help questionnaire development

By Mark A. P. Davies and Mel Prince

The use of focus groups for questionnaire development is well known and widely touted. Most marketing researchers are keenly aware that focus groups may improve the quality of survey instruments. However, few marketing researchers have a full appreciation of applications where focus groups are most fruitful, the range of benefits that accrue, and the special qualitative methodologies that may be employed to maximize these benefits. Thus, general codification of the methodology of focus groups for questionnaire design is an urgent need for marketing researchers and their clients. This article examines how protocols, developed through focus groups, can be used to substantially improve survey questionnaires.

The overall aim of using focus groups to aid in questionnaire design is to improve the quality and validity of information obtained in surveys. As a means of achieving these aims, focus groups provide insights and understanding of study subject matter, can help develop hypotheses for the quantitative study, discover new content areas, refine and classify survey content, and eliminate meaningless questions from the final questionnaire. It is useful to enumerate the range of benefits of qualitative analysis for questionnaire design. However, it is even more important to develop guidelines to achieve what is desired.

This article codifies situations and methods to show how focus group research can be used for questionnaire development. Much is known about basic criteria of suitable questionnaire design. What is not generally known is how focus groups may be used to determine appropriate question wording, issues to explore and the structure of scales that are employed. Questions determined from practitioner intuition or analogous experiences are extremely risky as they do not represent actual user feelings and opinions, attitudes and behavior.

Why focus groups are useful for questionnaire design

Focus groups are especially useful in questionnaire design for each of the following problems associated with questionnaire design:

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finding more effective segmentation criteria, eliciting emotional motives, learning consumer language for communications programs (Gordon and Langmaid, 1988: 3-5; McNeill, Sanders and Civille, 2000), and screening measurement areas. In sections to follow, we discuss each of these problems and provide some illustrations of techniques that may be employed. It should be noted the techniques that are illustrated may be applicable to a variety of questionnaire design problems.

A. Segmentation criteria

There is an increasing need to segment more precisely in consumer research since today's consumers exhibit a varied, complex and sometimes conflicting set of preferences. New sources of segmentation need to move beyond conventional demographics and psychographics.

Supportive techniques to develop segmentation criteria include the use of psychological projection. Templeton (1987: 249-250) has shown how figure drawings might be used in discovering the personalities of users and non-users for a discussion guide. Respondents to a discussion group might be asked to draw a figure of a person who they feel would subscribe to a particular magazine, purchase a candy bar, or join a particular charity. They are later asked to draw a figure of a person who would not use these products.

For benefit segmentation, in particular, Wade (1998) supports the use of focus groups in separating the characteristics of a product from the benefits that have obvious utility in communications programs. Wade (1998) recommends comparing and contrasting questions using side-by-side listings to uncover dimensions and attributes. Personal experience stories can describe how characteristics deliver benefits and why they are important.

If the objective is to reposition a brand, debate groups involving groups advocating rival brands may be quite useful. Another outcome of the brand debate approach is that the list of attributes and benefits will be reduced to those most salient to brand acceptance or rejection.

B. Emotional motives

It is not obvious or easy to penetrate the emotional side of behavior. First, it requires a level of understanding far deeper than that which can be gained from merely examining previous purchase behavior. Second, low-involvement items (routine, low-ticket items) are unlikely to be subjected to personal scrutiny each time a purchase is made, so the researcher must consider ways to examine purchasing motives from alternative perspectives to direct questioning (Templeton, 1987:16-17).

Psychological projective techniques that adopt oblique questioning have been used to uncover emotional motives in focus groups. Projective techniques have been used to encourage consumer openness about their own motives and feelings, beliefs and actions, and so tend to encourage more negative responses. With a low-involvement item, the moderator might place the product in a strange context, or ask how other people might use the product. Templeton (1987: 18) suggests the use of a fantasy trip in soliciting thoughts about essential cosmetics required to live in an exotic location.

Alternatively, respondents can be encouraged to shift their way of thinking more directly. Templeton (1987: 246) shows how the emotional side can be tapped into, using magazine subscriber profiling, as in this example:

"You've been very logical and articulate so far. Right now, I'd like you to turn off the logical part of your heads for a moment, and deal with some illogical, feeling-type distinctions. I'm going to pick some of the magazines and papers you singled out for mention, and ask you to imagine that each one is a person, whom you are trying to describe to somebody. Tell me about the (e.g., *Ad Age*) person. How old is he or she? Is it he or she? Married or single? What kind of car does s/he drive? Overweight or thin? Conservative or vogue-y? How about politics? Serious and buttoned-up or more freewheeling?"

Thus respondents can be encouraged to change from rational thinking to emotional feeling within the group discussions.

Focus group research may be used to identify the hidden drama in products that appear the most mundane on the surface. Reification of a brand can reveal the relative strengths and weaknesses from an emotional perspective. Describing a brand's epitaph, or the houses in which a brand might live, etc., achieves a kind of personification, creating the kind of refined imagery necessary.

C. Consumer language

Face-to-face dialogue with consumers in focus groups elicits consumer language about marketable objects. The advantage is that nuances of meaning can be identified from slang and from words that share a diffuse imagery (for example, words that share similar meanings that could easily be used out of context). The moderator can probe beneath the mind's surface for the meanings of words. For example, the word "crunchy" applied to a snack bar might indicate crispness to one group of consumers (suggesting positive associations) whereas to another it might indicate "hard to digest" (negative associations). Consumer language suggests expectations (e.g., this must have a biscuit base, or a nutty core) or reveals how the product is accepted by others if consumed in public (e.g., makes a crackly, embarrassing noise when bitten, implying negative associations). The number of identifiable and distinctive positive and negative associations can be useful for designing questions that will elicit product imagery in a survey.

Identifying consumer language is also useful for refining fundamental research questions and for identifying specific indicators of constructs such as brand loyalty that may otherwise be unknown when exploring new research areas.

In addition, focus groups can be used to improve reliability by helping better match response scales to how respondents actually evaluate (Wade, 1998). McNeill et al. (2000) reveal how this can be done, in refining attribute scales of peanut butter using generic descriptors of peanut butter taken from secondary research based on the peanut lexicon (Johnsen et al., 1988) and the semisolid texture terminology (Meilgaard et al., 1991). These generic descriptors were: appearance, flavor, and texture of peanut butter. Participants were asked to describe the peanut butter for each of these generic descriptors to identify specific descriptors and their direction (positive or negative). Consumers were also encouraged to describe products based on their own terms, beyond those merely associated with attitudes and usage. Consumers offered additional non-attribute-driven purchase influences to those reported by the peanut butter lexicon and semisolid texture terminology. These included early brand preferences, price, jar size, and reason for use (direct, or used in home baking) as strong influences of brand loyalty (McNeill and Sanders, 2000: 177).

Had no existing research been conducted on descriptors, the researcher would have been reliant on intuition and experience in conducting focus groups for products close to, but not identical to, peanut butter to guide their construction of a flexible research guide. Such an application of focus groups in exploratory research can chart unfamiliar territory for the researcher. The interviewing is much more open-ended, revealing variations in perspectives and attitudes.

Focus groups allow respondents to disclose a range of opinions on a set of issues and the circumstances that lead to one or another response (Morgan and Krueger, 1993: 18). Detection of a wide variation in responses to questions would suggest that the level of response options or scales used in questionnaires might need to be broadened. Although this can be identified through individual interviews, focus groups make more efficient use of sponsor time in commissioned research (Schechter, Trunzo and Parsons, 1993). Zeller (1993) suggests using a screener that encourages respondents to mull over topics before the focus groups begin, since this can promote richer discussions.

Since the level of professional and technical terminology is extended with establishment-survey questionnaires, there is an additional need to test for comprehension. Dillman (1978) has supported the use of precise language for respondents who share a particular understanding of the meaning of words by virtue of their training. Precise definitions for problem words identified in focus groups may be located on questionnaires to facilitate consistency in what is measured.

Analyzing non-verbal behavior

Analyzing and interpreting data may require moving beyond the spoken word, since people often do one thing and say another (Griggs, 1987). The moderator, if suitably skilled, can also pick out non-verbal behavior that may be relevant (e.g., gestures) when discussing products. By using neurolinguistic programming, the moderator can identify patterns in eye movements or hand, head and body movements that indicate whether respondents are talking truthfully or simply acting (Johnson, 1993). Transactional analysis is another technique that can be used to identify shifts in ego states (associated with parent, adult and child, for instance, Gordon and Langmaid, 1988: 146-148) regarding marketable objects, which may offer insight into why communications may be accepted or unaccepted.

D. Screening measurement areas

The focus group can be as important for deciding what to exclude from a questionnaire as what to include. Focus groups can act as filtering or screening mechanisms to help narrow the ideas for hypotheses generation that may be tested in questionnaires (O'Brian, 1993).

Here, the experience and judgment of the moderator may be critical in determining an inventory of attributes. Attributes selected for a survey should not be entirely dependent on votes or frequency of mention, since these have not always found to be reliable indicators of degree of importance (Abels, Domas and Hahn, 1997). An attribute may be particularly important despite it seldom occurring in practice. Personal experiences might indicate why or how an attribute is important, and offer more information than frequency of mention alone. Indicators of importance also include stress on words, excitement conveyed, interests captured by other members, changes in tone and body language.

Summary

Constructing questionnaires often involves knowledge of criteria used for market segmentation. Further problems include discerning emotional issues that drive consumer behavior, incorporating the language of consumers into questionnaires and screening items for inclusion. Using focus groups can reduce these problems in questionnaire design. In exploratory research, focus groups are particularly productive in establishing a broad range of marketing issues beyond consumer attitudes and usage. Once the broad range of issues has been identified, further discussion can establish the boundaries of these issues. The results are a precise focus on issues that are critical to the inquiry.

Focus groups are especially useful for establishing quickly (and efficiently) the range of issues that determine attitudes, opinions and behavior. Speed (and cost-effectiveness) is based on the cross-fertilization of ideas allowed in focus groups. This information enables an optimal battery of attributes and range of response options to be identified. This includes appropriate scale semantics and metrics. Intervention techniques involve projective methods and skilled probing.

Focus groups allow an experienced moderator to check on the general strength of feeling based on intensity of agreement and through signals of non-verbal behavior.

More work needs to be done to determine the kinds of research problems and instruments where focus groups can be most productive and the specific approaches that work best under these varying conditions. Among the important considerations are the samples used in focus groups, the character of the interventions, and the methods of analysis that are employed. Sample strategies include the use of homogeneous samples to refine perceptions, or adversary, interactive samples that argue different positions, or diverse small groups that are cohesive in problem solving. Suggested projective techniques include personal experience stories, brand personification, role-play and reification, and compare-and-contrast questioning techniques. | Q

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Survey Monitor

continued from page 8

Label report, which shows that sales of private label consumer packaged goods (CPG) are growing much faster than branded products. (*Editor's note: November's Survey Monitor featured a look at the global market for private label products.*) While branded products still constitute the majority of all CPG sales, private label products, also known as store brands, are not only enjoying faster sales growth, they are expanding into an increasing number of categories, becoming the share leader in more categories, and gaining an increased presence in more retail channels.

From 1997 to 2002, private label products had a 38 percent dollar volume growth rate, while branded products experienced a 19 percent growth rate.

Since 1997, private label products have grown from having a presence in 69 percent of the categories tracked by ACNielsen to 75 percent, entering 88 new categories in that time. In 2002, private label had the dollar volume share lead in 25 percent of the categories in which it competed — up from 21 percent in 1997.

Private label's initial success came from commodity-type products, such as milk, bread, cheese and eggs. More recently, private label has begun to make inroads into categories traditionally dominated by branded products, such as cosmetics and baby food. However, Gail Zielinski, ACNielsen Homescan account director and author of ACNielsen's annual U.S. private label study, says the vast majority of private label's overall growth is coming from expanded sales in established categories. "Private label manufacturers are driving sales growth by focusing on categories that have been traditional strongholds for store brands. They're introducing different package sizes and types, new flavors, and adding new, higher-priced premium private label products. In addition, several retailers are increasing their focus on providing in-store samples of their products and using other promotions to boost sales."

The grocery channel owns the largest share of total private label consumer packaged goods sales. However, its lead is decreasing as other retail channels add private label products to their shelves. The dollar store, warehouse club store and supercenter channels are generating the strongest growth in private label sales, albeit off of sales bases that are still relatively small. For more information visit www.acnielsen.com.

Private Label Shares 1997 vs. 2002

Channel	1997 Share of total PL CPG all-outlet $ sales	2002 Share of total PL CPG all-outlet $ sales	% Growth in PL CPG $ sales 2002 vs. 1997
Grocery	80%	67%	16%
Mass	6%	7%	59%
Supercenters	4%	12%	284%
Drug	4%	4%	29%
Warehouse Club	1%	5%	460%
Dollar	0%	1%	1,082%
Convenience/Gas	0%	0%	11%

Source: ACNielsen Homescan, all CPG products across all channels

Country Joe likes to fish

A study of the lifestyle and leisure activities of country radio listeners by New York-based Scarborough Research shows that they have above-average interest in outdoor activities. The study indicated that country radio listeners are 21 percent more likely than radio listeners nationally to go camping, 51 percent more likely to go hunting, and 25 percent more likely to fish. The country radio listener also has an affinity for speed. They are 23 percent more likely than radio listeners nationally to own a motorcycle, 30 percent more likely to own a personal watercraft, and 31 percent more likely to own a power boat.

When it comes to sports, country radio listeners are 36 percent more likely to be loyal fans (somewhat or very interested) of NASCAR than radio listeners nationally and 20 percent more likely to be loyal fans of the National Hot Rod Association. Country radio listeners are 58 percent more likely to be loyal Pro Rodeo fans than other radio listeners.

The Scarborough study reveals that Charleston, W.Va., has the highest percentage of country listeners, as over half (58 percent) of all radio listeners in that market tune into country radio. Ranking next on the list for country radio listening is Lexington, Ky. (55 percent), followed by Wichita, Kan. (52 percent) and Knoxville, Tenn. (51 percent).

Only 1 percent of radio listeners in Honolulu tune into country radio, putting that local market at the bottom of the list along with New York(3 percent) and San Francisco (8 percent). On a national level, the Scarborough study found that almost one-quarter (24 percent) of adults tuned into country radio in the past 12 months. For more information visit www.scarborough.com.

I can't wait until I reach my 30s

Being in your 20s isn't very rewarding according to a recent survey of 500 Americans in the age range of 20-29. The survey, conducted by InsightExpress, a Stamford, Conn., research firm, reveals that only one-third of employed twentysomethings are happy with where their career currently stands. Not only are young adults not happy with their jobs, they are having a hard time making ends meet as almost half who have entered the work force (45 percent) are still receiving financial assistance from family members. Many reflect back to their college days as a reason for where their career stands — two out of five say that "knowing what they know now" they would change the major they picked in school. All of this leaves America's twentysomethings in search of some levity.

So where do they go? To their televisions of course! According to participants, their favorite programs are the ones that make them laugh. Sixty-three percent said that they typically watch TV sitcoms, followed by one-hour dramas (54 percent) and news magazines, entertainment news or current event shows (34 percent). When they need some cheering up, one-third (29 percent) cite Fox as one of their preferred networks. More specifically, this group favors the following networks (twentysomethings citing as one of their three favorite networks): Fox (29 percent); NBC (27 percent); Discovery Channel (24 percent); HBO (20 percent); Comedy Central (19 percent).

"America's young adults are caught in a vacuum between the teen demographic they must leave behind and the more adult demographic that they are becoming," says Peter Price, president, National Academy of Television Arts and Sciences. "The twentysomethings increasingly rely upon and appreciate humor in TV as not only an escape but in their attempt to avoid 'crossing the bridge' into adulthood."

Television sitcoms aren't the only place twentysomethings turn to for a good chuckle, as more than 77 percent say they are more apt to pay attention to a television commercial that contains humor, followed by those that contain music they enjoy listening to (48 percent) and those that contain graphics, special effects or animation (30 percent).

"While advertisers need to recognize the power of humor when it comes to attracting this group, they have to make sure that the brand is recalled as easily as the humor," says Dan Gallagher, executive group planning director, Saatchi & Saatchi. "I can't tell you how many times a twentysomething has told me about a funny commercial but they couldn't remember who made it."

For more information visit www.insightexpress.com.

Perfume use wafting up

A study by Baltimore marketing firm Vertis reveals that three-quarters of women now wear perfume and more than two-thirds of men use cologne, a significant increase from 2002. "When it comes to fragrance usage the new survey shows a year-to-year increase of 14 percent among women and 9 percent for men," says Therese Mulvey, vice president marketing research at Vertis. "The popularity of wearing a scent waned in 2002, an indication of the general economic and emotional state of the American public a year ago. The good news for fragrance brands and marketers is that perfume and cologne have become more important to consumers."

The Vertis Customer Focus 2003: Fragrance study shows the following additional findings: 65 percent of women said they have purchased perfume in the past 12 months, compared with 60 percent in 2001 and 55 percent in 2002; Gen Y, Gen X and Baby Boomer females are 11-13 percent more likely to buy a fragrance today than they were in 2002; senior women are the only generation to show a decline in purchasing behavior — 51 percent in 2002 versus 43 percent in 2003; not surprisingly, smell is most important when women are selecting a brand of fragrance, followed by price and brand favorite; Hispanic women spent $40 more than the average woman on perfume and cologne in the last 12 months; 59 percent of men said they have purchased cologne in the past 12 months compared with 59 percent in 2001 and 47 percent in 2002; Gen Y men are the only age group to wear less fragrance than they were a year ago, 79 percent in 2003 vs. 75 percent in 2003; men are 11 percent more likely than women to allow what others think of a fragrance to influence their purchasing decision; half of women (50 percent) said that in the past 90 days they had smelled a fragrance advertisement in a magazine, up from 46 percent in 2002; 69 percent of women and 71 percent of men indicated that scented magazine advertisements are "somewhat" or "very helpful" when deciding which fragrance to buy, an increase of 4 percent for females and 15 percent for men from 2002. For more information visit www.vertisinc.com.

Scientists, firemen top list of most prestigious occupations

Americans see scientists, firemen, doctors, teachers and nurses as the professions and occupations which have the most prestige, according to a study by Harris Interactive, Rochester, N.Y. At the other end of the spectrum, the occupations which are seen as having the least prestige are real estate agents, stockbrokers, actors, bankers and accountants.

Only three occupations are perceived to have "very great" prestige by more than half of all adults; these are scientists (57 percent), firemen (55 percent) and doctors (52 percent). They are followed by four professions which are perceived to have "very great" prestige by more than 40 percent but less than 50 percent — teachers (49 percent), nurses (47 percent), military officers (46 percent) and police officers (42 percent).

By way of contrast, the list includes 10 occupations which are perceived by less than 20 percent to have "very great" prestige. The lowest ratings go to real estate agents (6 percent), stockbrokers (8 percent), actors (13 percent), bankers (14 percent), accountants (15 percent) and union leaders (15 percent).

These are some of the results of the annual Harris Poll measuring public perceptions of 22 professions and occupations, conducted by telephone by Harris Interactive between August 12 and 17 with a sample of 1,011 adults.

There is not much of a correlation between making money and having high prestige. Firemen, teachers, nurses and police officers all score very well on prestige but are not particularly well-compensated. At the other end of the spectrum, real estate agents, stockbrokers, actors, bankers and accountants can often make substantial sums of money, but have little prestige.

It is also clear that prestige does not mean celebrity. Most celebrities are probably actors, entertainers or athletes; and all of these are in the bottom half of the list in terms of prestige.

To judge from these data, it seems that prestige is strongly associated with respect. Professions with high prestige are those which are widely seen to do great work which benefits society and the people they serve.

Harris Interactive has been asking about the prestige of different professions and occupations since 1977. Over the 26 years since then there have been some quite substantial changes:

• Those who see teachers as having "very great" prestige have risen 20 points from 29 percent to 49 percent.

• Those who think lawyers have "very great" prestige have fallen 19 points, from 36 percent to 17 percent.

• Scientists have fallen nine points from 66 percent to 57 percent.

• Doctors have also fallen nine points from 61 percent to 52 percent.

• Athletes have also fallen nine points from 26 percent to 17 percent.

With the exception of teachers, no occupation or profession on the list has improved its ratings since 1977.

Most of the changes since last year are relatively small, within a possible sampling error for this survey. The biggest change is for scientists, who improved their "very great" prestige score by six points, from 51 percent to 57 percent. For more information visit www.harrisinteractive.com.

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tronic distribution in a variety of non-Web environments, including kiosks, LAN, telephone and disk.

Features common to all DirectCollect surveys include skips and branching, open-ended responses, customizable screen colors, backgrounds and fonts, password protection, answer piping, enforced scale patterns (i.e., Social Security numbers), enforced scale rankings and ranges, progress bars, optimization for full or windowed screen sizes, and automatic daily or weekly data archiving.

New kiosk features include large buttons for touch-screen entry, full screen lockdown with no system access (when CPU and keyboard hidden), password access to administrative mode when locked, and timeout for abandoned surveys with optional countdown warning.

Call center surveys are also now supported, with features including random calls pulled from database with priority to callbacks, autodial option, call management (interviewer indicates callbacks in two hours, tomorrow or at scheduled date/time), refused survey or update, invalid number, preload demographics or other data from database, and update outside database. For more information visit www.apian.com.

Monitor car-buying intentions with AutoVIBES

Rochester, N.Y.-based Harris Interactive and Kelley Blue Book, Irvine, Calif., have formed a strategic alliance to deliver the AutoVIBES report (VIBES:Vehicle Introduction Brand Excitement Scale) a new report for the auto industry revealing consumer awareness levels of new vehicle nameplates as they enter the marketplace as well as other automotive marketing information. AutoVIBES, based on a monthly omnibus poll, provides auto manufacturers, marketers and advertisers a way to measure and monitor the new nameplate buy intentions of in-market car buyers on an ongoing basis. As new vehicle models are introduced into the marketplace, Harris Interactive and Kelley Blue Book will track and trend which new nameplates are garnering the greatest amount of buzz among the car-buying public. Buzz is defined as awareness, consumer favorability, overall impression and likelihood of purchasing vehicles that have been introduced in 2003 or will be introduced in the 2004 model year. The top new vehicles having the greatest impact on the marketplace will be announced each month.

Additionally, this omnibus study can provide insights about: consumer reliance on incentives; brand loyalty (vehicle brands consumers are giving up versus brands they intend to buy); personal financial confidence rating for buying a new vehicle; and demographic information of in-market car buyers. Automotive manufacturers and other auto-related companies can include proprietary questions in the study for their own marketing and research purposes.

AutoVIBES is a monthly omnibus survey of 1,000 in-market car buyers who plan to purchase or lease a new vehicle within the next 12 months. The survey is conducted on Kelley Blue Book's Web site (www.kbb.com). Design and analysis of the study are done jointly by Harris Interactive and Kelley Blue Book Marketing Research. For more information call Kelley Blue Book at 949-268-3074 or Harris Interactive at 877-919-4765.

Package testing product from Ipsos

New York-based Ipsos-Insight has launched a new package-testing product in the U.S. called Pack Evolution that enables manufacturers to use the Internet to test package designs using digital shelf displays.

Pack Evolution's true-to-life testing is designed to reflect real phases of shopping behavior: as part of the online survey, respondents emulate approaching the store shelf (i.e., digital shelf) and then move in for a closer look at the packages on the shelf. Clients obtain insight into a product's on-shelf visibility, brand recognition and persuasion.

Pack Evolution's sample sizes allow for quantitative, rather than qualitative, analysis. Plus, its assessment of the link between package design and brand name is designed to go beyond traditional eye-tracking or T-scope measures. And, for clients who need to conduct global research, Pack Evolution has been designed as a standardized, multi-country tool. For more information visit www.ipsos-insight.com/analytics/packevolution.cfm.

Hispanic omnibus from Greenfield

Greenfield Online, Wilton, Conn., has launched a new Hispanic omnibus. The shared-cost study is fielded to 250 Hispanics age 18+. Both in-language and English options are available. The launch of the Greenfield Online Hispanic Omnibus coincides with plans to expand Hispanic recruitment efforts and create an In-Language Hispanic panel of 25,000 members by December 2003. In addition to the In-Language Hispanic Panel, more than 45,000 Hispanic pre-existing members of the Greenfield Online panel are being re-screened and provided with the opportunity to decide whether they prefer to participate in English or in-language surveys. For more information visit www.greenfield.com.

New brand audit tool

The Total Customer Experience (TCE) Brand Audit determines how well brands are delivering on their promise to satisfy customers and provides data to help companies develop strategies and tactics to increase customer satisfaction and long-term brand loyalty. The TCE Brand Audit uses a four-phase approach:

• Identify the full range of brand market competition and touchpoint variables that affect the customers' experience.

• Benchmark the market's existing competitive brand expectations and provide a starting point for understanding what is important to customers.

• Measure the brand gaps between what customers want and expect versus what the brand is providing, identify the strategically important brand gaps, and recommend action steps.

• Monitor the effectiveness of corrective actions, help prioritize future actions, and identify emerging threats.

The TCE Brand Audit was developed by Socratic Technologies, a San Francisco research firm, in association with Nelson & Company, a Puerto Vallarta, Mexico-based brand marketing consultancy. For more information visit www.sotech.com or www.nelsonbranding.com.

FGI expands online panel to additional countries

FGI Research, Chapel Hill, N.C., has expanded its online research panel to include access to over 14 million additional consumers in 28 countries throughout South America, Europe and Asia-Pacific. The global online panel, marketed under the SmartPanel Global brand, builds on the four million North American consumers that are accessible in FGI Research's existing online panel. SmartPanel Global provides real-time access to consumer opinions in 15 European countries, as well as Japan, China, Hong Kong, Taiwan, Thailand, Indonesia, India, Malaysia, The Philippines, Singapore, Korea, Australia, Brazil and Argentina. In addition to the global online panelists, FGI Research provides a suite of in-country panel management, questionnaire design and translation solutions. For more information visit www.fgiresearch.com.

Briefly...

Nichols Research, Inc. has moved its Fresno, Calif., office to 600 W. Shaw, Suite 350, Fresno, Calif., 93704. The new office features a large focus group facility and is located in a demographically diverse and fast-growing area. For more information call Amy Shields at 559-226-3100.

Chicago-based Bacon's Information has relaunched its Express Media Monitoring Service, which delivers coverage to clients the day it appears in the media. The Express service covers 175 U.S. daily newspapers, business weeklies, major magazines, and international English-language dailies.

Facts 'n Figures/Health Care Testing has opened a new qualitative research facility in Los Angeles. Located in Sherman Oaks, the facility features four focus suites with observation room, client lounge and private office. Other amenities include T1 lines, DVD, video, CD, audio, ActiveGroup, simultaneous translation, and a commercial test kitchen. For more information call 818-986-6600 or visit www.factsnfiguresinc.com.

New York-based research firm Ipsos-Vantis has relaunched its Web site www.ipsos-vantis.com, adding new content, a new look, case studies, articles, and product and service development solutions in a question-and-answer format.

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expenditure and ratings.

AccessPoint/**Open Air**. Hand-held CAPI interviewing which uses integrated GPRS-based cellular data communications to achieve economical always-on two-way communication between research or fieldwork organizations and their interviewers in the field, across the Internet.

Dimensions Data Model/**SPSS MR**. A new open platform for research applications using a common metadata model to facilitate free exchange of research data between any compatible applications, and incorporating an open development environment for building MR-specific applications.

InterviewerVCC (Virtual Call Center)/**Voxco**. A Web-based CATI system with full telephony integration which allows interviewers to work from many different locations via the Internet, and yet access telephony functions including automated dialing, centralized sound capture, audio and visual monitoring and call transfer to expert interviewers.

The overall winner was scheduled to be announced at the Research Excellence and Effectiveness Awards at the London Mayfair Millennium Hotel in November.

New accounts/projects

TNS' television audience research tool InfoSysTV has been selected by the BBC to undertake detailed TV audience measurement across both its terrestrial and satellite channels.

New companies/ new divisions/ relocations/ expansions

Reston, Va.-based **Wirthlin Worldwide** has opened a new office in Shanghai. Heading the office will be WeeKeng Lee and Su Liu. Vincent J. Breglio, managing director of WirthlinWorldwide Asia, will assist in sales and client service.

Customer management firm **dunnhumbyUSA** has opened a new office in Cincinnati. Located on the corner of 3rd and Plum in the downtown area, dunnhumbyUSA employs 26 people and will expand to a workforce of 45 by the end of the year, with plans to have 100 employees in 2004.

Seattle-based **Q2 Brand Intelligence** has opened three regional offices on the East Coast, in Cambridge, Mass., Atlantic City, N.J., and Orlando, Fla.

Cincinnati-based **Directions Research, Inc.** (DRI), will expand operations into Dallas, its third expansion in three years. Beth Daush and Brook Fagley have been named vice president of client services. They will share in the management of the new office. DRI was founded in 1988 and recorded revenues of $17.2 million in 2002.

Company earnings reports

For the third quarter ended September 30, New York-based **Arbitron Inc.** reported revenue of $75.3 million, an increase of 8.3 percent over revenue of $69.6 million during the third quarter of 2002. Net income for the quarter was $17.0 million, compared with $15.4 million for the third quarter of 2002. Earnings before interest and taxes (EBIT) for the quarter were $30.6 million, compared with EBIT of $29.0 million during the comparable period last year.

Costs and expenses for the third quarter increased by 10.5 percent, from $39.9 million in 2002 to $44.1 million in 2003. Interest expense for the quarter declined 29.3 percent, from $4.1 million in 2002 to $2.9 million in 2003, due to reductions in the company's long-term debt.

Net income per share for the third quarter 2003 increased to $0.55 (diluted), compared with $0.51 (diluted) during the comparable period last year. In the third quarter 2003, Arbitron reduced its long-term debt by $20.0 million from $135.0 to $115.0 million.

For the nine months ended September 30, revenue was $208.1 million, an increase of 8.4 percent over the same period last year. Net income for the nine months increased 13.4 percent to $41.1 million or $1.35 per share (diluted), compared with $36.3 million or $1.21 per share (diluted) last year. EBIT was $76.6 million, compared to $71.6 million in 2002.

Opinion Research Corp., Princeton, N.J., announced financial results for the third quarter ended

September 30. Revenues for the third quarter were $44.9 million, an increase of 4 percent compared to the corresponding quarter in 2002. Social research revenues were $29.1 million versus $26.3 million last year. Market research revenues totaled $12.0 million versus $13.3 million in the prior year. Teleservices revenues were $3.7 million versus $3.8 million last year.

Net income for the third quarter was $0.7 million, or $0.11 per diluted share, versus net income of $0.9 million, or $0.15 per diluted share, in last year's third quarter. The increase in the effective tax rate from the prior year period is due to the company not providing a tax benefit for non-U.S. losses in the current year as well as higher state taxes from profitable segments. The company is not providing a tax benefit on state losses. Summarizing the quarter's results in a company press release, Chairman and CEO John F. Short said, "Both our social research and United Kingdom market research units turned in an excellent performance, with revenues increasing by 11 percent and 22 percent, respectively. Our U.S. market research and teleservices businesses continued to feel the impact of weak business spending in the United States."

For its third quarter ended September 30, Chicago-based **SPSS Inc.** reported revenues and diluted earnings per share were $52.1 million and $0.19 in the quarter, as compared to $52.7 million and a loss per share of ($0.26) in the same period last year, respectively. Operating income improved to $4.6 million in the quarter from an operating loss of ($7.4) million in the same period last year. Included in the results for the quarter were technology write-offs, restructuring costs and other nonrecurring charges of $10.9 million.

The company's improved profitability was primarily due to expense reduction programs implemented in the third quarter of 2002, which included a field operations restructuring, the downsizing or closing of certain facilities and the termination of certain investments. SPSS also increased its cash flow from operations to $18.8 million in the first nine months of the year, up from $13.4 million in the first half of 2003 and ($1.5) million in the same nine-month period last year.

"We saw no changes this quarter in closure rates, sales cycles or transaction values," said Jack Noonan, SPSS Inc. president and chief executive officer, in a company press release. "And despite increased activity in almost every part of our business, there was still little sense of urgency exhibited by customers in making purchasing decisions. Some evidence suggests that organizations will be more motivated in the coming quarters. While we are prepared for this possible change, we are not counting on it."

Revenues and diluted earnings per share for the first nine months of 2003 were $152.5 million and $0.39, as compared to $155.3 million and a loss per share of ($0.42) in the same period last year, respectively.

Operating income improved to $10.2 million in the first nine months of 2003 from an operating loss of ($13.5) million in the same period last year. Included in the results for the nine months ended September 30, 2002 were technology write-offs, restructuring costs and acquisition and other nonrecurring charges of $16.5 million.

Chicago-based **Information Resources, Inc.** reported results for the third quarter 2003 ended September 30, posting a net loss of ($0.1) million or ($0.00) per share compared to net income of $0.9 million or $0.03 per share for the third quarter of 2002. Results for the 2003 third quarter include severance-related restructuring charges of $0.7 million, transaction costs of $1.6 million related to Gingko Acquisition Corp.'s tender offer for all of the outstanding shares of IRI common stock, and the write-down of certain international data costs of $0.8 million.

Third-quarter consolidated revenues of $136.0 million were 3 percent lower than prior year. U.S. revenues of $94.8 million were 9 percent below the same period last year, reflecting the previously announced decision of Procter & Gamble to not renew its U.S. contract with IRI beginning with the third quarter. International revenues of $41.3 million were 13 percent higher than prior year or 2 percent higher in local currencies.

"IRI's third quarter earnings reflect the full impact of the loss of the Procter & Gamble business. However, our ongoing efforts to reduce expenses in both the U.S. and Europe and improved performance in Germany have helped offset the margin impact of the lost P&G business," said IRI chairman and CEO Joe Durrett in a company press release.

For the nine months ended September 30, the company reported near break-even results. This compares to a net loss of ($8.2) million or ($0.28) per share for the same period last year. Year-to-date 2003 results include severance-related restructuring charges of $3.0 million, transaction costs related to the proposed tender offer for IRI of $2.3 million, and one-time charges related to the write-down of certain data-related assets of $2.0 million. Year 2002 results include restructuring charges of $7.2 million and a charge of $7.1 million due to a change in the accounting treatment for goodwill.

Consolidated revenues of $416.1 million for the nine months ended September 30 were 1 percent higher than prior year. U.S. revenues of $296.6 million were 4 percent lower than the same period last year while international revenues of $119.5 million were 14 percent higher than prior year, but 1 percent lower in local currencies.

For the third quarter 2003, IRI's U.S. business reported operating profit of $4.1 million on revenue of $94.8 million. This compares to operating profit of $5.2 million on revenue of $104.2 million for the third quarter of 2002.

Most of the revenue decline of $9.4 million, or 9 percent, was due to the loss of the P&G business, which became effective with the third quarter of 2003. The impact of this loss was felt in both Retail Tracking, which represents 73 percent of U.S. revenue, and Panel and Analytics, which represents 22 percent of U.S. revenue. Compared with third quarter a year ago, Retail Tracking declined by 6 percent while Panel and Analytics declined by 13 percent. However, U.S. expenses were reduced by 8 percent versus prior year, partially offsetting the revenue decline. IRI continues to aggressively manage expenses across the business through outsourcing and process and technology improvements.

Excluding the impact of P&G, IRI's U.S. Retail Tracking revenue grew 1 percent for the quarter. As of the end of the third quarter 2003, 17 of IRI's top 25 U.S. Retail Tracking clients are under contract through 2004 or beyond and seven have committed to IRI and are in the final stages of negotiation for new multi-year agreements. Panel and Analytics reported a 4 percent decline in revenue excluding the impact of P&G, primarily the result of decreased demand for IRI's proprietary BehaviorScan testing service. The other principal components of Panel and Analytics, syndicated and custom household panels and modeling, continue to perform well.

For the third quarter 2003, IRI's international operations reported an operating loss of ($0.4) million on revenue of $41.3 million. This result includes the write-down of $0.8 million of certain data-related costs. For the third quarter of 2002, the company reported an operating loss of ($2.0) million on revenue of $36.4 million.

The improved performance versus 2002 is driven by a combination of increased revenue and lower expenses. In local currency, revenue grew 2 percent versus prior year, while expenses declined 2 percent. Improvements in the German business account for much of the overall improvement in international results. While IRI continues to lose money in Germany, those losses have been reduced as the company stabilizes its operations and begins to rebuild lost revenue. In IRI's other European markets, revenue growth continues to be a challenge; however, cost reduction actions taken earlier this year have helped enhance European profitability.

Corporate expenses for the third quarter ended September 30 were $2.7 million, including $1.6 million of transaction costs related to the pending tender offer for all of the outstanding shares of IRI common stock.

Harris Interactive, Rochester, N.Y., released its financial results for the first quarter of fiscal 2004. Revenue for the quarter was $33.3 million, up 10 percent versus $30.3 million of revenue for the same period a year ago. Internet-based revenue for the quarter was $17.9 million, up 57 percent from last year, while traditional revenue contracted by $3.5 million or 19 percent. "We believe that the uncertainty and confusion surrounding the FTC's national Do Not Call registry dragged our telephone-based revenue lower than expected and caused us to miss both revenue and profit expectations for the quarter," said Gordon S. Black, chairman and CEO, in a company press release. "Industry sources indicate that telephone response rates have plummeted, and respondent irritation over receiving market research calls has recently grown dramatically. Therefore we believe that the downturn in telephone revenue will not only continue, but may accelerate. We are at much less risk than other market research firms however, since our U.S. telephone-based revenue comprises less than one-third of our total U.S. revenue."

Pre-tax net income for the quarter was $2.1 million, or $0.04 per share, up 102 percent versus pre-tax net income of $1.0 million or $0.02 per share for Q1 of fiscal 2003.

In accordance with GAAP requirements, the company booked an income tax provision of $800,000, based on pre-tax income as if the company did not have net operating loss carry-forwards available for use. The tax benefit associated with the utilization of those carry-forwards to offset expected fiscal 2004 earnings was recognized in June 2003. In the future, in accordance with GAAP, the company will account for the tax effect of the remaining NOL carry-forwards, which currently are in excess of $80 million. Therefore, for this quarter, after-tax net income was $1.3 million or $0.02 per diluted share.

Internet-based revenue for the fiscal first quarter was $17.9 million; up 57 percent from the $11.4 million of Internet revenue reported for the same period last year. "Our year-over-year Internet revenue growth rate actually accelerated slightly this quarter, and continues to grow faster than the industry average. As our online research in Europe builds, we believe that this growth rate will continue, and perhaps accelerate if the DNC registry drives a more rapid conversion to online research," said Black.

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Trade Talk

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visits, workbooks and phone surveys, also helped the company describe key concepts and ideas in the customers' language. And the videotaped portions were a good way to communicate with the designers, who are so used to dealing with things in visual terms.

During another session, Shari Tallarico, an ethnographer at Microsoft, explained the ways she challenges people in Microsoft's mobile device product group to pay attention to how much useful information can be gleaned from being observant during a shopping trip. For example, she organizes small groups for ethnographic excursions to places such as the Pike Place Market in Seattle to observe how people hold and interact with their mobile phones and PDAs. During debriefing sessions the participants recount what they saw and determine how it might be useful to Microsoft product developers.

Tallarico says ethnography isn't a cure-all, nor is it a replacement for other kinds of research. Some internal clients have had questions about the methodological rigor of ethnographic sessions, but once they've had an ethnographic experience that they felt brought them close to a customer's experience, the questions of rigor have tended to fall away. | Q

Names of Note

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Cincinnati-based *Directions Research, Inc.*

WirthlinWorldwide, a Reston, Va., research firm, has reorganized some senior management responsibilities, naming **Dee Allsop** chairman of the

Allsop

board, in addition to his current role as CEO, and expanding the role of President **Dave Richardson** to include the title of chairman of the global business planning committee, which was recently formed to concentrate on WirthlinWorldwide's global strategy and strengthen collaboration, coordination and planning between the firm's offices around the world. **Richard Wirthlin**, who began the firm in 1964, will assume the title of founder.

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