# QUIRK'S

Marketing Research Review

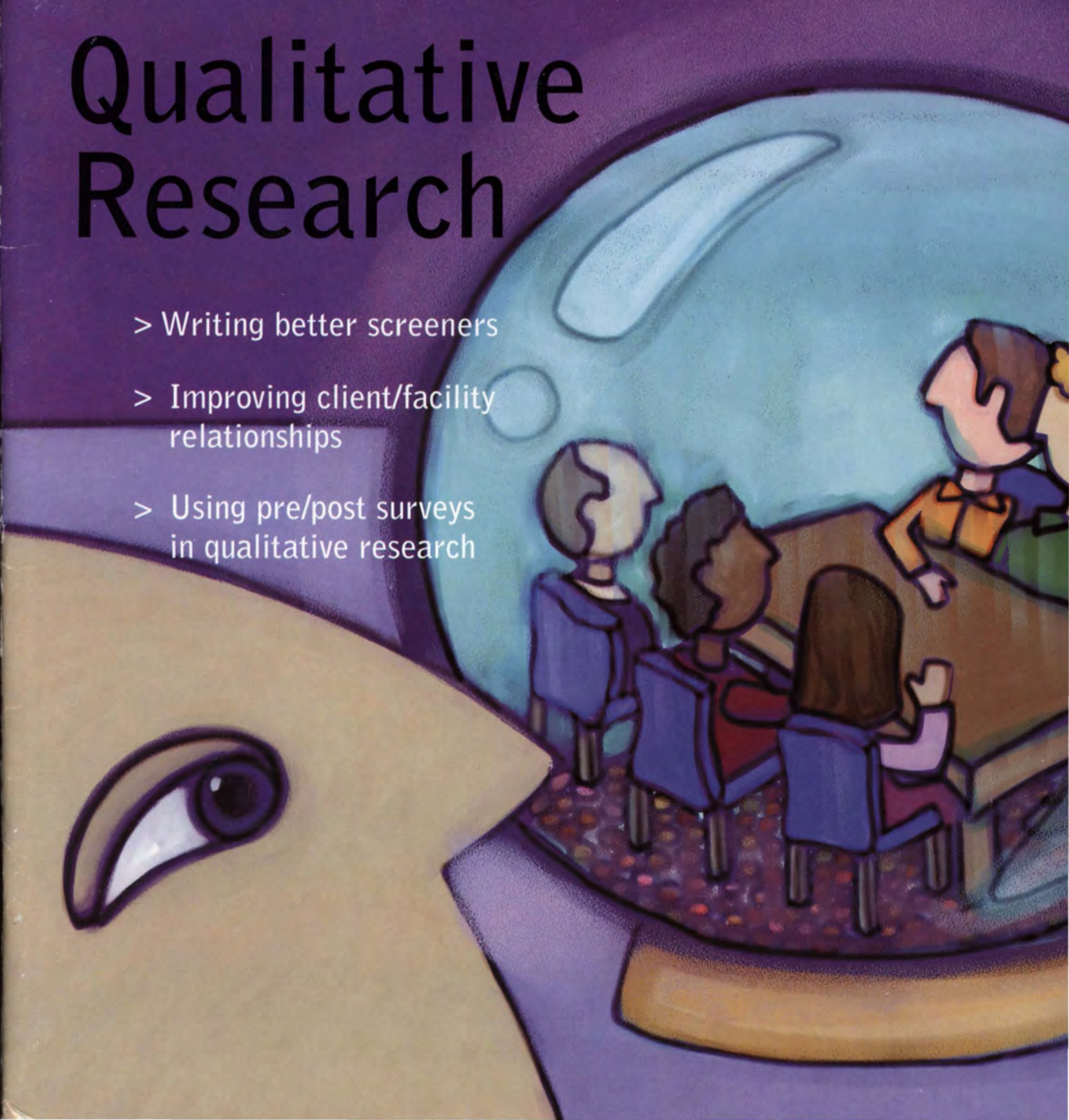
DECEMBER 2004

# Qualitative Research

> Writing better screeners

> Improving client/facility relationships

> Using pre/post surveys in qualitative research



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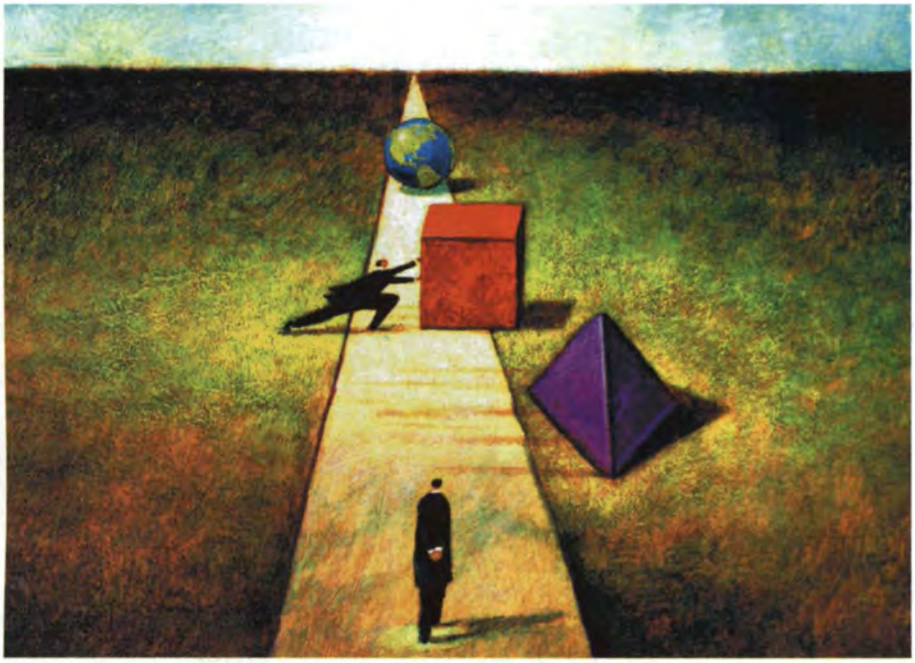

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Volume XVIII Number 11

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# Consumers plan to expand Web purchase categories this holiday season

A report by New York-based JupiterResearch, Holiday 2004 Forecast: Consumers Look to Online For Inspiration and Planning, estimates that online retail holiday sales for the period of November and December 2004 will reach $21.6 billion, a 19 percent increase compared to the same period in 2003. Online sales continue to experience double-digit increases, versus uneven growth offline, primarily due to the growing number of online buyers; 86 million U.S. residents are expected to make holiday purchases online this year compared to 73 million last year, an 18 percent increase. In addition, JupiterResearch forecasts a 2 percent increase in spending per buyer compared to last year.

While the usual list of top-selling categories - toys, books and apparel - still dominates consumers' planned purchases this year, consumers say they will buy a wider variety of items online this year than in years past. This data reinforces the overall trend of consumers increasing the number of categories they purchase online.

"Consumers use the Internet to get inspiration as well as to find good prices at the holidays," says JupiterResearch Retail Analyst Patti Freeman Evans. "Over half of online holiday shoppers say they will use the Web to get gift ideas or to seek better prices. To capture these customers this holiday season, retailers are wise to use e-mails to alert customers who have left items in their shopping carts or wish-lists when the price changes or inventories get low on those items. Also, shoppers say that many messages will influence them to buy earlier this holiday season, with free shipping topping the list once again this year. However, as the season winds down, online holiday shoppers say that messages on reliable delivery, in-stock reassurance, and complimentary upgrades to overnight shipping will resonate." For more information visit www.jupitermedia.com.

## Kids want electronics this year

According to the KidzEyes Holiday Wish List and Habits survey from C&R Research Services, Chicago, toys are out and electronics are in for Christmas this year. When asked what they would prefer, toys or electronics, 78 percent of the kids surveyed chose electronics. Toys also lost to money (68 percent chose money over toys) but beat clothes (45 percent chose clothes versus 55 percent for toys).

Kids think their parents will give them the most gifts this year, with 33 percent of kids saying parents will give them five to 10 presents. According to kids other gift-givers will give them one to two gifts (grandparents - 40 percent; aunts/uncles - 44 percent; friends - 42 percent).

One-quarter (25 percent) of kids surveyed said they pay for holiday gifts they buy with their own money. However, mom and dad do augment kids' holiday budgets: 45 percent of kids said they use both their own and their parents' money.

Fifty-nine percent said they save money to buy holiday gifts. Of those kids who save money to buy holiday gifts, more than one-third plan on spending between $25-$50. Nearly one-quarter (24 percent) plan on spending $51-$100 while 23 percent plan on spending less than $25.

When it comes to preparing for the holidays 64 percent of kids say that their moms bear the brunt of responsibility, versus a mere 1 percent of kids who say dad does his fair share.

According to kids, 25 percent of dads shop for their wives the week before Christmas, while another 13 percent said their dads scour the stores on Christmas Eve.

This year, nearly half of kids (48 percent) said they would ask their parents to donate some of their allocated "gift" money to charity. For more information visit www.kidzeyes.com.

## Many Internet households ready to switch to bundled services

Over 60 percent of all Internet households would be willing to consolidate their services under a single provider if so doing saved $20 per month, according to Bundled Services: Analysis and Forecasts, a new industry report from Parks Associates, a Dallas research firm. This prospect of cost savings far outweighs convenience as an influencing factor, for only 43 percent of these households would switch to a video, telephone, and Internet bundle without a savings incentive.

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# names of note

*S&T Bank*, Indiana, Pa., has named **Doug Schwabenbauer** vice president - marketing analyst.

**Ananda Mitra** has been named the first director of the *Wake Forest University Survey Research Center.*

New York-based *Millward Brown* has named **Joanna Seddon** executive vice president.

St. Louis-based *Doane Marketing Research* has named **Hylon Kaufmann** as market development manager. She will be based in Sanger, Calif.

**Kaufmann**

**Wood**

*Digital Research, Inc.*, Kennebunk, Maine, has promoted **Marcia Wood** to research director, heading up the company's medical education tracking program.

**Martin Silcock** has been named account director, *Millward Brown UK*. **Jon Tayler** has been appointed associate account director.

**Ruth Mensing** has joined *Product Evaluations*, Inc., La Grange, Ill., as program development specialist.

**Vickie L. Cole** has been appointed director of technology research at *Decision Analyst Inc.*, Arlington, Texas.

**Cole**

Utah-based data collection firm *PGM, Inc.* has named **Rebecca Walters** client development manager.

New York-based *Ipsos* has announced the following promotions in its U.S. marketing research division, Ipsos Insight: **Mike Bellmont** has been promoted to vice president, Ipsos-Insight Services Division, Minneapolis; **Matt Kleinschmit** has been promoted to vice president, Ipsos-Insight Services Division, Chicago; and **Kerri Ryan** has been promoted to vice president, Ipsos-Insight Services Division, New York. In addition, **Mike Weisberger** has been promoted to senior vice president and will succeed **Lynne Armstrong** as head of the company's behavioral tracking division. And **Curt Stenger** has joined the company as vice president of analytics for the Ipsos-Insight consumer products division.

*Fieldwork International*, London, has promoted **Jeff Lucas** to project manager within the telephone unit. **Madhava Turumella** has joined as a systems development manager. **Matthew Seabrook** has joined eQuesta, Fieldwork International's online survey department, as a team leader.

*ICR/International Communications Research*, Media, Pa., has added **Steve E. Ballou** as senior vice president, advanced research methods. In addition, **Nicholas J. Tortorello** has joined the organization as vice president of public affairs and marketing research. He will be located in new offices for ICR in New York City with Jim Fleckenstein.

Europe-based research provider *Ciao* has made seven new appointments. **Olga Hoffmann-Kulaga** has been named senior project manager, based in Munich. In Madrid, **Melanie Wiles** has been named senior project manager; **Cristina Cucullo** has joined as junior project manager; **Saqib Farooki Reboredo** and **James Ifill** have been named survey scripters; and **Anders Aarstad** and **Marijn de Visser** have joined in panel support roles.

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# product and service update

## Do online groups quick with QuickGroups

V2 GfK, a Blue Bell, Pa.-based research firm, is now offering QuickGroups, an interactive remote solution for conducting quick focus group research. Aimed at clients who need fast-turnaround focus group results to provide information for time-pressed decisions within their organizations, QuickGroups enables clients to stay interactively engaged with the research project without traveling to research facilities.

Designed with the help of videostreaming specialists ActiveGroup, QuickGroups keeps clients involved with the research process through a two-way virtual communications network.

QuickGroups' reporting tools give clients an almost-instant summary of results at each step of the project. First, with RealTimeReports, clients receive summary notes of the discussions in 30 minutes following the conclusion of each focus group. Second, each morning, clients receive a topline summary report with QuickClips video highlights of the previous day's key findings to distribute to colleagues, enabling them to see and hear customers' reactions. Finally, by 8 a.m. on the day following the last group, clients receive the final QuickGroups executive summary report with analysis and supporting video clips. For more information visit www.v2gfk.com.

## Gongos method measures emotional connections

Gongos and Associates, a Bloomfield Hills, Mich., research firm, has introduced The Gongos E-C Technique, a methodology that combines qualitative and quantitative research techniques to measure the impact of soft elements (such as underlying emotional connections and brand associations) on purchase considerations. Emotional connections are consumer-identified emotions and values connected with a product or brand. This methodology is designed to tap into consumers' less conscious motivations and identify the "real" and often missed drivers related to purchase and affinity toward a product category/brand.

It identifies the personally relevant role a brand or product plays in the consumer's life and then explains the potential business impact of that information. Applications range from new product development and product positioning/repositioning to marketing, advertising and understanding brand essence. For more information visit www.gongos.com.

## SurveyConsole adds API

SurveyConsole, Seattle, is now offering a developer and integration application programming interface (API), an online do-it-yourself surveying technology, at www.surveycon-sole.com. The XML-based API allows organizations to extend as well as integrate with the existing services offered through SurveyConsole.com. With the open and standards-based integration platform, developers can create toolsets that work with the data collected using online surveys. The API also allows for integration with proprietary customer databases and CRM systems. Based on ubiquitous standards like SSL, XML and HTTP, the SurveyConsole Web Service API allows systems within corporate networks to access their data collected and hosted using SurveyConsole.

SurveyConsole offers a Web-based interface to create surveys, publish them and analyze the results in real-time. Surveys can be distributed via e-mail or posted on Web sites for data collection. A suite of analysis tools are also provided as part of the service for as well as analysis and report generation using Microsoft Office products. For more information visit www.surveyconsole.com/developers.

## Respondent anonymity guaranteed by QuestionPro

QuestionPro Inc., Issaquah, Wash., is now offering a program that guarantees anonymity to survey respondents. Under the program, QuestionPro acts as the independent entity providing technology services between researchers and survey respondents. QuestionPro, using a combination of technology and contractual agreements, guarantees that survey responses can never be linked to personally identifying information like e-mail addresses, IP addresses etc. The Respondent Anonymity Assurance program is aimed at reinforcing the right to privacy as well as anonymity for the respondents while at the same time making it easy for researchers as well as customers to communicate with each other using online surveys. For more information visit www.questionpro.com/security/.

## System manages data online

U.K. research firm Nunwood Consulting Ltd. has created Knowledge Systems, a modular, Web-based information system designed to simplify how businesses manage their data. The three-component system consists of: Knowledge Library, an information storage and management system,

**continued on p. 72**

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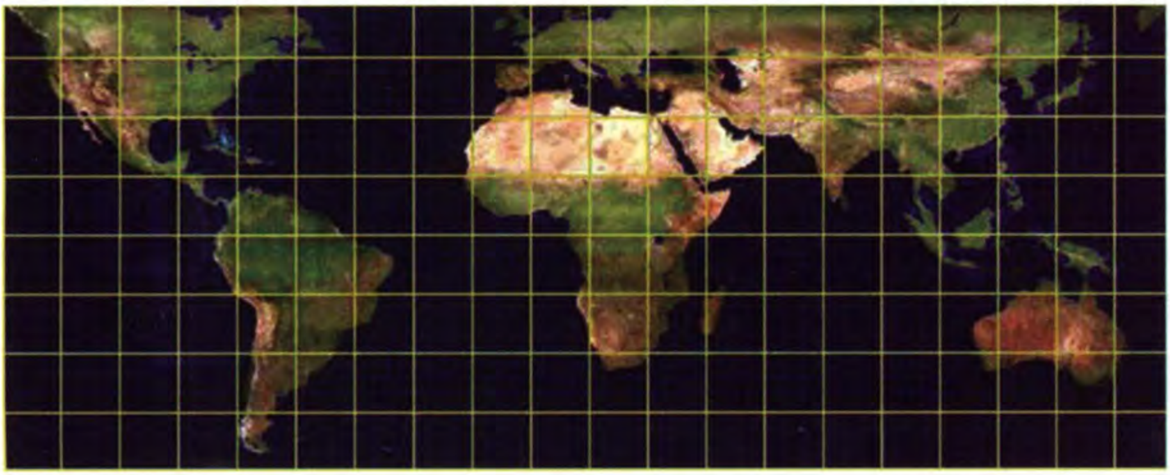

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# research industry news

## News notes

Norway-based research software company **FIRM** is preparing for a listing on the Oslo Stock Exchange (OSE). The initial public offering is expected to take place in 2005, though the timing will be dependent on prevailing market conditions. FIRM generated revenue of $8.5 million in the first nine months of 2004, an increase of 35 percent from $6.3 million for the first nine months of 2003. Full-year revenue for 2003 was $9.7 million; 17 percent came from Scandinavia and 83 percent from the U.S., Europe (outside Scandinavia) and Asia. FIRM's EBITDA was $67,000 in the third quarter 2004 with revenue of $8.5 million YTD. Revenue growth for the third quarter 2004 was 38 percent relative to the third quarter 2003. FIRM has chosen Carnegie as the lead manager for the IPO.

## Acquisitions

**Experian**, Costa Mesa, Calif., has acquired **Simmons Research**. "The combination of Simmons and Experian allows us to link our respective consumer marketing capabilities to offer our clients a broader range of communications solutions - from contact strategies to customer and prospect databases," says Bill Engel, co-CEO of Simmons.

**The Kantar Group** has agreed to acquire **Oracle Market Research Limited** (Hong Kong) and **Oracle Market Information**. Following the acquisition, Oracle's operation will join Kantar's Added Value network, and be branded as Oracle Added Value. Founded in 1994, Oracle is headquartered in Hong Kong, with offices in Beijing, Shanghai and Guangzhou. Oracle employs 130 people and had revenues of $8.4 million for the year ended December 31, 2003 and net assets at completion of the acquisition of $2.1 million.

U.K.-based **MASMI Research Group** has merged two Russian subsidiaries, MASMI Moscow, specializing in quantitative research, and MASMI Mart, a qualitative research agency. The two agencies formally joined forces on November 1, 2004 and are located in office facilities on M. Semyonovskaya St. 9 in Moscow's Bauman district, with several hall-testing facilities, three focus group studios, and working space for up to 120 staff members.

## Association/organization news

On November 15, 2004 the **British Polling Council** (BPC) was launched by several of Britain's pollsters. The objective of the Council is to ensure standards of disclosure which will give consumers of survey results that enter the public domain an adequate basis for judging the reliability and validity of the results. Through full disclosure the Council aims to encourage high professional standards in public opinion polling and to advance the understanding, among politicians, the media and general public, of how polls are conducted and how to interpret poll results. The BPC will also provide interested parties with advice on best practices in the conducting and reporting of polls.

The following companies are applying to be founder members of the new organization: CommunicateResearch, ICM, MORI, NOP, ORB, Populus, TNS System 3 and YouGov.

John Barter, ex-chairman of NOP and a past chairman of the Market Research Society, has agreed to become president of the BPC. He will refer any questions raised under the rules of disclosure to an investigating committee comprising three people drawn from the subcommittee on disclosure. The following have agreed to serve on this sub-committee in a personal capacity: Simon Atkinson (MORI); David Butler (fellow of Nuffield College Oxford); David Cowling (BBC); David McKie (ex-deputy editor of *The Guardian*); Nick Moon (NOP); Adam Phillips (a past chairman of the Market Research Society and chairman of ESOMAR's professional standards committee); Colin Rallings (professor at the Local Government Chronicle Election Centre at University of Plymouth); Peter Riddell (*The Times*); and Peter Kellner (YouGov).

The BPC has been modeled on the successful National Council for Published Polls (NCPP) in the U.S. and BPC members are grateful for the advice received from the NCPP

## Calendar of Events January/March

ESOMAR will hold "Age Matters: Interpreting Needs, Developing Strategies" on January 30-February 1 in London. For more information visit www.esomar.org.

ESOMAR will hold a conference on the financial services industry on February 1-3 in London. For more information visit www.esomar.org.

ESOMAR will hold "Innovate!" a conference on research innovation, techniques and technology, on February 27-March 1 in Paris. For more information visit www.esomar.org.

ESOMAR will hold its Asia Pacific conference on March 13-15 in Tokyo. For more information visit www.esomar.org.

in starting the BPC.

"The organizations that are seeking membership of the BPC recognize the need for uniform standards of disclosure about how polls are conducted so that consumers of poll findings have an adequate basis for judging the reliability of the findings and all the proposed founding members enthusiastically support this new Council. Once the Council is established readers of poll findings will have full access to information on how polls have been conducted, what questions were asked and how the data collected has been computed to produce the published results," says Barter.

The formation of the British Polling Council follows the publication of an Early Day Motion signed by more than 80 members of Parliament from all the main parties which expressed regret at "the decline of self-regulation of public opinion polling companies in the United Kingdom," concern that "there are no sufficient checks on the integrity of polling or polling organizations," and expressed "concern at the proliferation of non-scientific/empirical polling, in particular the use of techniques designed to secure the results favored by those who commission the polls, and lack of transparency in the methodology employed."

The BPC shares these concerns. For these reasons its membership will be restricted to organizations that: set out to measure the opinions of representative samples scientifically; and uphold the principle of transparency.

In agreeing to disclose full information about how samples are drawn, how raw data are weighted, and the full wording of questions and answers, the BPC seeks to demonstrate its commitment to the highest standards and greater public understanding of the methods used to conduct representative surveys. For more information visit www.britishpollingcouncil.org/press.html.

A new research strategy designed to measure advertising recall more accurately than traditional techniques swept the board at the Research Excellence and Effectiveness Awards, which were hosted by **The Market Research Society** (MRS) at London's Café Royal in October.

This approach to advertising research was developed by Robert Heath at the Value Creation Company and Pam Hyder from Standard Life. Their entry scooped both the ISBA Award for advertising research effectiveness and the David Winton Award for new technical developments in research.

Heath and Hyder's project, which was undertaken for Standard Life, tested why it is that advertising that works on our emotions can still result in low recall levels. They compared a popular recall-based

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Focusing on diversity

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By Rhoda Schild

# Bring a can-do attitude to recruiting out-of-facility focus groups

Lots of focus groups are being conducted outside of, and far away from, the traditional facility room. When a client wants to hold groups outside the normal setting, how does a facility or recruiting service meet this challenge? With willingness and know-how. Stir in a positive attitude, an awareness of pricing and some flexibility, and first-rate focus groups can be done anywhere.

A moderator calls us, asking, "Can you get me eight diagnosed, allergic respondents?" Quickly we reply, "Yes, it will take a bit of work, but it can be done."

Elaborating, the client continues, "We want diagnosed allergic respondents to be willing to go on a picnic field trip. As prerequisite for this group, prior to attendance, all respondents will have to submit an MD-written letter stating they have been diagnosed, they are taking prescription medication, and that for one day only, it is acceptable for them not take their medication. We want to watch them sneeze, wheeze, blow their snout, then, in their discomfort, tell us how they make their choice of what tissues they purchase. It is vital we get their straightforward responses in an authentic environment. Previously we have frittered away everyone's time and our money doing standard focus groups. We have observed too many respondents do what humans do best: please. We do not need to be charmed, we need to know why they are not buying our brand of tissues."

It is effortless to recruit to a facility. A facility is complete, it can be set up to a client's specifications with phones, video, computers, food and drink service, the works. Contrast that to a picnic field trip. Which would you rather set up? But for an already disappointed client, observing non-medicated allergic respondents' discomfort and true tissue choice in the great outdoors may elicit a "eureka" moment.

Out-of-facility focus groups are certainly challenging. But good old-fashioned toil is good for the psyche, the soul and the pocketbook. A tough job here and there can make subsequent jobs effortless.

*Editor's note: Rhoda Schild is president of Rhoda Schild Marketing Services, a New York research firm. She can be reached at 212-779-3633.*

How about focus groups on busses? Yes, busses. Big, roomy, comfortable busses transporting respondents, moderators and video personnel - and food and drink - to a gambling casino, a senior-citizen facility, or an out-of-town sporting event. This type of recruiting, when done well, is remarkably rewarding; it's gratifying for clients, recruiters and respondents.

## Begin with optimism

As a recruiter, you begin with optimism. Never say, "We don't have those people." If you do not have them, get them. This is the recruiting business. A good recruiter on a bad day should pull together a reasonable amount of new respondents. A database cannot be good unless it is updated and cleansed often, very often. A tenacious work crew can find respondents anywhere. (A depressive on the work crew can bring the team

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to the depths of despair. While you are cleansing your database, remember to also cleanse your staff.)

While out-of-the-facility recruiting eliminates a room rental fee, it guarantees higher recruiting costs. If you are in the recruiting game this phrase should be at the top of your list: "If the price is right, we can do anything." It's a trickier recruit that also requires higher incentives.

Here's a reality check for anyone who may be under the illusion that qualitative recruiting is done by going door to door: It is not. It is done by telephone. The very best focus group recruiting is done by services that have loyal, smart, creative staff and top-notch quality control to eliminate the unsavory types who try to seep through the smallest crack.

Back to cleansing. Your aim is to make your database impeccable, cleansed of trashy respondents, updated and miniaturized. For quick specialty recruiting, a smaller database is better. Searching through mammoth archives will not work here. It is simple to gather thousands of names; it takes time and labor to customize, downsize and rid your files of the chaff.

**Train them**

Now that your databank is in remarkable shape, your next chore is to get your recruiters in this same condition. Train them. Do not let them flounder. Encourage them to be speedy, to speak fast, to speak with intonation, to uphold a positive attitude. By example, show recruiters how to rid themselves of skepticism, of negative behavior, of annoyance and a "we can't do that" approach. Think Katie Couric.

Hold a venting meeting for recruiters to vent. Yes, let them vent! On rare occasions, a reward policy for recruiters can be utilized. Verbal and written praise, along with an occasional monetary bonus, are incentives well-given.

Confidence can waver. Recruiters say, "We're slow! Clients are looking for speedy turnaround. They are asking for the impossible!" There is truth to these observations. Work has changed. Clients who once wanted fast work now want ultra-fast performance. Just as reality shows have taken over TV, on-location interviews and focus groups have taken their place in the marketing research arena.

Not every facility or recruiting service has the luxury of having a bilingual staff at their disposal. Bilingual is a good thing; speaking poorly and calling it English is a bad thing. Expressive recruiters are worth their weight in gold; inarticulate recruiters should be dumped before your client dumps you.

Blessed be the recruiters who can pull these projects off. They adapt, are flexible, optimistic, experienced, they can branch out in every direction. First-class recruiters innately network all the time. Their memory, their recall, their ability to go out-of-the-

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Pulling together a quick, atypical recruit in an extraordinary milieu demands out-of-the-ordinary recruiting. The old adage "The best person for the job is a busy one" plays out here. Part-timers, not used to pressure, often disappoint.

> **Out-of-facility focus groups are certainly challenging. But good old-fashioned toil is good for the psyche, the soul and the pocketbook.**

**Venture forth**

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By Mark Cooper

# Fed up with focus groups?

## Why visual ethnography makes sense as a research technique

Are your qualitative market research techniques bringing you the full range of insights into consumer behavior? Knowing that consumers don't always do what they say - or say what they do - you need research techniques that tell you what focus groups and self-administered surveys won't. Visual ethnography - a contextual, behavioral-based research method - documents the activities of consumers' daily lives in the places where those activities usually occur, bringing you consumer insights that you cannot get from any other research technique. Visual ethnography observes what consumers do - how they overcome obstacles and discover inventive uses for conventional products. It doesn't ask them to remember what they have done in the past or predict what they may do in the future, but instead listens to them describe what they are doing right now and why. And it works in the environments where respondents are most familiar and most comfortable, surrounded by the people and things that shape what they do. These ethnographic methods bridge the gap between what consumers say and what they do, providing insights that can be used throughout the product cycle, from strategy development through product design and direct communication with the consumer.

Here are some examples of insights selected by our anthropologists from recent ethnographic work.

*Editor's note: Mark Cooper is managing director of the Insight Works, a New York research firm. He can be reached at mark@theinsightworks.net.*

**Water usage - excess valves, filtration and conservation**

Our firm engaged in a visual ethnography project for a global fashion plumbing and accessory products company. The objective of our research was to understand the role water and water appliances play in family plans for home design, décor and home improvement. We were interested in learning about consumers' unmet needs in relation to water usage in and outside the home. In particular we wanted to help this company discover new opportunities for installing residential valves.

Our ethnographers, accompanied by professional videographers, studied 19 families in three markets: Westchester, N.Y.; Orange County, Calif.; and Phoenix. We focused on family members' daily water-related activities in their kitchens, bathrooms, garages, family rooms and outdoor areas. In so doing, we were able to observe and document their behavior in a natural atmosphere. In addition to asking interview questions, our researchers were able to develop lines of questioning born of observation that might never have been predicted prior to entering the field.

As a result of our video ethnographic inquiry, we found that older Baby Boomers are not necessarily retiring to Florida anymore. Rather they are "rewiring" their careers; they are developing new occupational expertise and identities. Hence, one of our key findings was that as people "rewire," rather than invest funds into new homes, they remodel their current homes to meet their changing lifestyle and career needs. Some, for example, remake teenagers' old rooms into home offices. Some turn master bedrooms into hotel-like suites. Still others transform family rooms into mini professional gyms where they train private clients.

Our video ethnographic research provided us with the means to discover these consumers' unmet needs in relation to water usage. People talked about, for example, their desire to build a "beverage station" with easily accessible drinking water in their newly designed home gyms, thereby allowing us to uncover one possible site to add in new residential valves. In short, the video documentary of the metamorphosed rooms allowed us to help our client learn about new opportunities to design, develop, install and market water valves.

**The paradox of pain and exercise**

The Insight Works conducted ethnographic research for a prescription medication developed by a leading pharmaceutical company to alleviate severe episodic pain. The goal of this research was to understand the mindset of middle-aged exercisers who use pain medication to maintain their active lifestyle. The anthropologists interviewed and observed six people as they went through part of their

exercise routines (five in outdoor parks and one in an indoor gym).

A key finding was that most of these individuals had been athletes in their youth and were still holding onto their identity as an athlete (or at least an active person) even when the facts contradicted this self-perception. We learned that their current exercise routines are often efforts to try to recapture, retain or regain youthfulness. One poignant example of this was the memory of high school track meets and moving "like a flock of birds" through Prospect Park that a walk though this park triggered for one 49-year-old subject. In this project, visual ethnography enabled us to capture the body language and facial and vocal expressions that conveyed the emotional struggle that results from the gap between subjects' self-perception ("I'm an athlete") and their daily reality (pain, aging and physical limitations).

The research also enabled us to identify an important emotional struggle among middle-aged people who exercised with arthritis-related pain. We learned that people are not simply fighting pain and the aging process but are often engaged in a battle to retain a core part of their identity (young, athletic, fit and active). Thus, the drug's advertising can tap into the feelings and motivations of this group by presenting an inspiring portrait of individuals who are fighting and winning this battle.

### The role of pictures in a digital world

We performed a project for a worldwide producer of photographic products on how families use digital photography and printing. Our objective was to understand the role of photography in consumers' lives and how digital technology has changed the ways consumers take, store, share and print photographs. In particular, we wanted to discover consumer attitudes towards printing at this company's retail kiosks, an important strategic growth area.

Ethnographers conducted six videotaped interviews and home tours in three markets: San Francisco, Houston, and Danbury, Conn. Respondents were asked to reflect upon the importance of photography in their families' lives; to show favorite photographs and how they were displayed in the home; to demonstrate how they use digital technology and talk about its benefits and frustrations; and to discuss what they hope to see in the future of digital photography and printing.

We discovered that family photography is an activity primarily performed by females to commemorate and record family events. Digital technology has given these consumers greater confidence in their abilities, since they can immediately check the results in the viewfinder, and continue retaking the shot until they get the image they need. The instant gratification and sense of control that these women enjoy when taking photographs, however, does not extend to the process of printing

their images. Few of these women feel confident in their abilities to enhance their photographs using computer editing software, or to print them at a satisfactory level of quality (clear, unpixelated, with crisp colors). Some continue experimenting at home, some entrust the printing process to an online or retail printer, and others do not print at all. Furthermore, overall levels of printing have significantly decreased, since consumers can share photographs by e-mail, create digital photo albums, and only choose the best photographs to print.

In discussing their expectations of digital printing, most of the women stressed the importance of the quality of their digital prints. Conducting interviews in the respondents' homes, however, allowed the ethnographers to pursue contradictions that would not have been apparent in a self-administered survey or a focus group. Home tours revealed that most of the displayed photographs consisted of professional portraits, particularly in the formal areas of the home. The kind of candid photography that digital technology makes so easy was only to be found in temporary displays in more casual areas (such as the home office or on the refrigerator), and these images were chosen by virtue of their content and not the quality of the image.

We concluded, therefore, that consumers want the simplicity, convenience and instant gratification of digital photography to extend to their digital prints. We suggested that our client should build on consumers' positive experience of digital photography and its own brand profile as the maker of high-quality, competitively-priced 35mm film, by emphasizing the speed, simplicity and low cost of printing at this company's retail kiosks, and by conveniently locating these kiosks in grocery or department stores where the consumer already shops. Thus this manufacturer of photographic products could market itself as the brand that gives consumers the high-quality images they have come to expect from the brand, but in a number of new, simple and convenient ways, whether at home, online or at retail.

## Hispanics and department stores

In order to better understand the mindset of immigrant Hispanic women, especially the emotional motivations for their shopping practices, a leading chain of department stores asked our firm to investigate shopping behavior among Hispanic families in the Chicago area. They wanted to understand whether their general-market pillars of convenience, brands and value resonated with these Hispanic women shoppers.

Since, unlike women in the general market, Hispanic women usually shop with a friend or relative, we conducted six in-home pre-recruited friendship groups with three people each. All of the groups were conducted in Spanish by the anthropologist and filmed by a professional videographer. In each group, the partici-

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pants, since they knew each other well, were open, relaxed and lively. The discussions covered these women's experiences negotiating this country as immigrants, their families and hopes for the future, their shopping experiences and strategies, their opinions on product brands, the differences among stores and their relevant financial issues.

After each discussion, two subjects from each group went shopping together, accompanied by the anthropologist and videographer, who now carried a hidden camera. In some cases, children accompanying their mothers added another dimension of realism to the study. Three "shop-alongs" took place at one of the client's department stores, while three took place at competitive stores. In this phase of the research, the anthropologist asked few questions. Rather, she observed the women as they went through the store, felt and examined clothes and household items, analyzed together why, how and when they might purchase an item, gossiped and laughed, played around, tried on clothing and made a purchase.

A key finding of the study was that many immigrants felt that they had sacrificed the sense of freedom and safety they had in their home countries when they moved to the United States in search of greater economic stability. One woman said, with tears in her eyes, "We came here with diapers on," new to the world, unaware of and unprepared for the challenges that awaited them. Shopping with relatives or friends provided a comfortable atmosphere outside of the home where they could take their time, reconnect socially and feel safe and free to do what they wanted. Additionally, they used shopping as a way to learn and stay informed about American culture. Thus, shopping meant much more to immigrant Hispanic women than just making purchases.

Following this finding, it became clear for our client that the mainstream market pillar of "convenience" did not translate as an important issue for Hispanic shoppers. The Insight Works recommended that they offer this shopper an environment in the store that gives her the freedom she yearns for and the control of her life that she values. Additionally, the department store's advertising should encourage her to experience shopping as an event where she is free not only to explore and to experiment but to use shopping as a bonding and social occasion.

### Expanding usage for a leading metropolitan museum

When a major U.S. museum asked us to help them understand the motivations driving the loyalties of their most frequent visitors, we all shared the same assumption: these visitors were loyal because they had the greatest interest in what the museum exhibited. It came as a surprise then, when ethnographic research revealed that the museum's most loyal visitors were loyal because the museum was a comfortable and familiar place for them. For these visitors, the museum is a place to relax, to spend time with family and friends, as well as to learn and to grow - the state-of-the-art exhibits serve as a backdrop, albeit an important one, for these other activities. Other visitors, who came to the museum less frequently, felt compelled to take the exhibits - and the rules - of the museum more seriously, creating a sense of unease and awkwardness that made it difficult for them to relax and enjoy their visit - and discouraged them from visiting more frequently.

The results were based on the detailed analysis of more than 150 hours of video - including intercept interviews, hidden-camera observations, in-home and in-museum ethnographic interviews, and photo journals from more than 50 visitors. We used these findings to help the museum develop a strategic plan for defining the museum experience in the 21st century - including recommendations for increasing the comfort and familiarity of less-frequent visitors that would encourage them to visit the museum more often, and ways to encourage frequent visitors to explore beyond familiar territory and to become more engaged with what the museum has to offer. In the end, the results of our research challenged conventional assumptions about museum visits, giving the museum an actionable approach to meeting the needs of today's visitors.

### Technology: a look inside the e-family home

We conducted a visual ethnographic study for a computer manufacturer about the role technology plays in the American family. Our objective was to understand the different attitudes families have toward technology and integrated multimedia and home computing systems. We were interested in finding out how technological convergence responded to their current and future needs as well as how the consumers perceived that this company's brand could satisfy those needs.

Ethnographers conducted six in-depth family videotaped interviews and home tours in New York and Los Angeles. In-home observation allowed anthropologists to determine that consumers have practices that sometimes contradicted their discourses on technology. While technology was appreciated for the simplification, productivity and efficiency it brought to their lives, and the way it enhanced in home entertainment, it was also perceived as "dangerous" and a "controlling force" that could cause "addiction" and interfere with the quality of family time. Although families claimed that they set limits to the use of technology at home, anthropologists observed not only that most rooms had some technological device (television, VCR, DVD or computer) but that their use was also more prevalent than initially described.

During one of our in-home interviews, for example, one family with young children had them eating dinner in the kitchen while watching a video. And while showing us how the children used the home computer, the parents' solution to the children's fighting over the computer was to take one to watch a video. In contrast, one African-American family from New York was the most successful in setting limits to technology with their idea of a technology-free room in which the family joined to share conversation, sing and dance together and play different musical instruments.

Our findings also showed that, regardless of consumers' comfort level with technology, they all felt behind regarding the latest technological developments. Changes in technology were experienced as too fast for them to keep up with financially and/or intellectually, thus generating strong feelings of frustration. Although consumers welcomed new technological developments and fantasized about complete interconnectivity at home, they also considered the technology they currently had as satisfactory for their needs.

We also found that consumers had not yet been able to catch up with their current technologies. Thus what they wanted the most from technology companies was to partner with them in their learning process and to provide them with good technical support that offered them solutions to their technical problems. This finding was used to reinforce a new purpose and brand positioning for this computer company so that it could be identified as a "total solutions partner." This computer company also became aware that consumers in severe weather areas might be more likely to invest in new technologies and get more involved in the learning process because they spend more time at home.

### Learned some lessons

In more than five years of conducting these types of studies we have learned some lessons about the successful execution of visual ethnographic research.

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The video summation that substantiates the written findings, conclusions and strategic implications is a critical deliverable in visual ethnographic projects. It acts as documentary evidence of the learning and insights revealed by the ethnography and serves as a powerful means of enlightenment at all levels of management. For it to be most effective, it must be edited skillfully so that it is narrative in style and flows sequentially in a way that is easy to follow for viewers with no direct connection to the project. | Q

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# Understand the mind of the market

## A look at participatory inquiry and hermeneutics

By Jennifer Haid

This article lays out the case for a heretofore infrequently used form of market research - participatory inquiry guided by critical hermeneutics - as a way to obtain a deeper, more nuanced understanding of consumers and brands than is often reached through traditional surveys, focus groups and consumer interviews. Because many aspects of daily activity and culture are so ingrained in how consumers think and act, they are often unable to accurately convey, or even to understand themselves, why they think and act as they do, which calls for observational research and/or a new form of inquiry.

There are several methods to understanding the consumer beyond traditional surveys and focus groups, including observational research, ethnography and in-depth conversation series. This article reviews this last method, and the value of informing and analyzing those conversations with critical hermeneutics (the study of interpretation), which in essence legitimizes the interpretive nature of understanding the consumer. No research data is purely objective; there is always an interpretation or a series of interpretations that take place as research is gathered, organized and presented. Traditional positivist research aims for answers; critical hermeneutics provides interpretations and explanations that everyone involved works to create.

Any learning about the consumer is only as good as its application and implication for a brand. While participatory researchers give added dimension to consumers, they are able to do the same for their brand(s). The thoughtful researcher who unearths a new or unexpected consumer value or attitude in an industry will use that learning or some key idea related to it when working with a brand. This article reviews the background of participatory inquiry and hermeneutics, discusses opportunities for its application, and explores implications for further research.

### Background

Central to participatory hermeneutic research with consumers is the legitimization of interpretation, or the acknowledgment that each understanding of the consumer is in fact an interpretation, and can

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only ever be an interpretation rather than a definitive fact as is common in the positivistic sciences, which is partially shaped by the researcher's prejudices or pre-understandings. Prejudice does not have a negative connotation here, but instead refers to the world an individual knows, based on prior experiences, interactions, language and values. When a researcher recognizes and acknowledges the role of prejudice as shaping his or her interpretation of consumer statements and actions, that researcher sees the value in returning to the consumer for additional clarification throughout the research process. For example a researcher and consumer in conversation about why that individual purchased a high-end home theater system may discuss the reasons for making the purchase, such as holding movie parties, enjoying a stay-at-home luxury, or immersing oneself in sporting events. The researcher may interpret "holding movie parties" as a reason for purchase to mean that without the system, the consumer would not hold the parties at all, and so return to the consumer for additional information. Upon reviewing the data and talking more, the researcher and consumer determine that why the item was purchased and why it is used (which may or may not be the same) are not as telling as how the product makes its owner feel. In this case the owner may feel confident as an entertainer, more social, powerful, wealthy, relaxed or rejuvenated. Talking and probing more about the use of the home theater, the researcher uncovers both new data and new issues to address or consider moving forward.

Anthropologist Clifford Geertz reminds us of the cultural anthropologist's "keen sense of the dependence of what is seen upon where it is seen from and what it is seen with" (*Local Knowledge*, 1993, p. 4). It is this context - as rich and broad as possible, and brought to light with participatory hermeneutic research - which researchers can use as a framework for understanding the thoughts and experiences of diverse consumers. Consumer behaviors are just the tip of an often underestimated iceberg which is the whole of consumer culture, the main portion of which is defined by how consumers think, why they behave as they do and how they make sense of their beliefs, actions, relationships and the world and marketplace around them.

At the heart of the power of participatory inquiry and critical hermeneutics are both their simplicity and their concomitant richness. Even as used every day, dialogue takes on new meaning and power as researchers engage in conversation as a forum for learning about participants as well as adopting new business ideas. Philip Carl Salzman lays out a simple metaphor: "[F]acts are interpretations that we make of specific things in the world...Collecting facts is thus not like collecting stones, which keep their own shape; we shape the facts as we interpret the specific things about which we are doing research...There can therefore be different descriptions of the same situation...[and] all descriptive accounts of the facts are as open to debate as are theories" (*Understanding Culture: An Introduction to Anthropological Theory*, 2001, p. 5). The value of hermeneutics lies in its nod to difference in an attempt to bridge multiple understandings rather than attempt, almost always unsuccessfully, to arrive at one set of agreed-upon facts. In short, the business objective laid out for a market or target consumer may not be the best objective once the consumer is better understood, and once the consumer is better understood, the business problem may change.

As Geertz succinctly yet eloquently states, "[m]an is an animal suspended in webs of significance he himself has spun, [and] I take culture to be those webs, and the analysis of it to be therefore not an

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experimental science in search of law but an interpretive one in search of meaning" *The Interpretation of Cultures*, 1973, p. 5). The generalizations that questionnaires and focus groups often hold as their ultimate aim do not get at the heart of human or consumer behavior, in that they attempt to measure the "what" without always asking about the "why." New opportunities for self-reflection and heightened understanding of the consumer are present with open and flexible conversations that empower the participants to talk about new ides and challenge one another. Marketers stand to gain not only in their awareness of the consumer, but also in their insight into their brand opportunities moving forward.

### Interview vs. Conversation

| **Interview** | **Conversation** |
|---|---|
| Researcher and "subject" | Two participants |
| Subject answers researcher's questions | Participants answer each other's questions |
| Typically one or two occurrences | Two or more occurrences |
| Guided by a set of pre-determined questions | Guided by where the conversation goes |
| Objectivity is a goal for researcher and data | Subjectivity is recognized and analyzed |
| Researcher learns about the subject | Participants learn about each other |
| Organized around a business question or goal | May change the business question being posed |

**Found a place**

Participatory research and critical hermeneutics have found a place in the worlds of several large companies and industries, including IBM Corporation, Cisco Systems, Oracle Corporation, Wildaid, Ernst & Young, Capitol One Financial, and public utilities. Swedish companies were some of the first to employ participatory research in understanding project management styles, particularly where there are employees from a wide range of cultures. The methodology is also used in education, international relations, organization development, and community development and activist work conducted worldwide.

Application of critical hermeneutics elaborates even everyday themes, elevating them from mere assumptions to thoughts of which researchers can understand the development and context. Both researchers' and consumers' personal

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experiences and deliberations become valid components of the process and legitimate sources of insight in analyzing assumptions and enhancing mutual understanding. In essence, it is insufficient to know what a consumer is doing along with his or her single explanation of why, as that explanation may be inadequate, unclear or misinterpreted. More profitable approaches come in the form of observation and discourse, the latter addressed here, and embarked upon with a plan for future refinement, and as such analyzed once or more for possible weaknesses in conveyance or clarity, so the researcher can then return to the participant and obtain that clarity. The beauty of hermeneutic research is that as the researcher returns to the participant for clarity, he or she may become aware for the first time of other areas that require illumination, and thus able to refine the results as often as needed or desired.

Let's say a researcher wants to know about a consumer's reasons for choosing a particular brand of jeans. The main reason provided by the consumer is comfort. The researcher understands comfort as a practical desire, and reiterates that to the consumer, who then indicates that yes, comfort is important, but it's really all about the combination of comfort and high style - a big difference. People will pay upwards of $150 for comfortable jeans, but not just because they are comfortable; certain designer denims are a badge of style and status.

Qualitative in approach, participatory inquiry here will involve several conversations (note the word interview is not used here as these conversations are two-sided engagements intended to enlighten the researcher on issues relevant to the participant as well as the business objective that he or she may not have thought about prior to the conversation, and as such both the conversations and business questions may and often do change direction over the course of the research) intended to get researchers deeper in touch with consumers, possibly reframing their business questions, and as such asking new and more fruitful questions. Critical hermeneutics provides the platform from which researchers can then look critically at their research and "understandings" of the consumer, acknowledge their personal take on what was conveyed as well as the possibility of misinterpretation and misunderstanding, and return to the research participant for clarification. Clearly, then, the researcher or client must be comfortable with the departure from positivistic research methodology, and able to invest the time and money needed to arrive not only at new understandings of the consumer, but also new questions that arise - the answers to which may provide an entirely new dimension of con-

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sumer understanding and a reconfiguration of business goals.

How can the novice employ this type of research? Look for quality over quantity. Rather than having several hundred or thousand people complete a survey, take the time to hold individual conversations, or lunch discussion groups if time is limited. Treat the conversations as the mini-ethnographies they are; the researcher must be prepared to change direction and questions as needed, and keep as thorough notes as possible. The review of these notes will help guide subsequent conversations as the researcher and participant(s) revisit what was discussed and try to ensure agreement on the content and meaning of the dialogue. ("You mentioned you don't think this brand speaks well to a diverse group of consumers. What do you mean by diverse? When you said it doesn't resonate with Hispanics, did you mean all Hispanics?) How long this process takes is a function of the time the researcher has, the availability of participants for additional conversations, and the need for further clarification as dictated by the content itself.

## Begin to understand

Many successful brands, original or reinvented, pride themselves on being as much about the experience as the product. Critical hermeneutics enables marketers to begin to understand the different ways in which consumers make sense of that experience, as they live, work and consume in a world with others, in which interpretation is a part of everyday life. Transformational leadership in an industry requires that a company explore and then define how it will innovate and what its brand will truly mean to consumers. People have myriad reasons to purchase a sports car, store-label product or luxury accessory, to patronize a fast-food chain or budget hotel, or fly a particular airline. Successful marketing messages and brand identities may resonate widely throughout the market, but not everyone has the same experience with or reason for shopping at H&M or buying a BMW. Hermeneutically-informed participatory research, conducted by the appropriate professionals, can provide insight into the whole host of feelings that consumers may encounter in a brand experience.

Corporate, education, advocacy, social and political organizations employ participatory researchers with knowledge of critical hermeneutics for good reason: simply stated, they can provide a richer understanding of just about anything studied. With careful attention to detail, time to participate in multiple conversations and ask questions, and a willingness to share personal interpretations which may be challenged or revised, researchers can begin to experience a deeper understanding of consumers. | Q

# Adding a little advance work

### Pre/post surveys as part of qualitative research

By Alan S. Kornheiser

In conducting qualitative research, especially when doing a sizable number of focus groups, there is always the temptation to treat some of the data as quantitative. Thus, a report may contain such phrases as "a strong majority of respondents preferred the new to the old formulation," even if the researcher is concerned that such a "majority" has little meaning in the real world. Client expectations, and the tendency to want to substitute focus groups for projectable surveys, make this problem worse.

In fact, however, the total sample available from a set of eight - or even, pushing the point slightly, a set of four or six groups or a set of 50 in-depth interviews - is often sufficiently large to provide some measure of reliability. A sample of almost 100 people is usually large enough, for example, to ensure that the new version is not seriously worse than the old version and indeed - because sensitivity in a survey only increases as the square root of the sample size - may represent a perfectly reasonable number of interviews if one only needs a general sense of the market's reactions.

The problem is not the sample size; the problem is the sample selection and the interviewing process. Those attending focus groups are rarely typical of the market as a whole, and the discussion process is rarely typical of real-life purchasing behavior. Thus, ending a focus group by asking "Who prefers A and who prefers B?" is unlikely to yield much except a dangerous self-confidence. Still, because many clients will insist on asking such a question and because it seems foolish to avoid asking the question if there is some way to make the answer useful, we have developed a methodology that both improves on the quality of what we normally want to get from focus groups and provides a better "quantitative" result.

There are three caveats:

1. This procedure is not cheap; plan on increasing your cost-per-respondent by at least $25 and perhaps as much as $50, depending on how you value your time.
2. These results are only meaningful if your respondents represent your target population. With simple consumer goods, focus group recruiting often does not do this as well as one might wish.
3. Accordingly, we suggest using this procedure primarily for com-

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We typically utilize a pre/post testing formulation. When they are recruited, respondents are informed that they will be sent a questionnaire to be filled out and returned before the group begins. We send this via Federal Express, and we enclose a prepaid Federal Express envelope for the return. This has an impact all out of proportion to its modest cost: our respondents become aware that we are serious and take themselves and their task seriously. We use this questionnaire to obtain all the useful but time-consuming baseline data that so clutter up the first 20 minutes of most qualitative research and to prepare the respondent to think seriously about the topic at hand.

We have attempted in the past to save time and money by using either e-mail or faxes to distribute the questionnaires. Neither works well. Fax distribution is surprisingly unreliable for such studies; additionally, it limits the size of the questionnaire and inhibits the questionnaire's return. E-mail should work but doesn't; mail programs are sufficiently variable that formats are destroyed and what begins as an elegant questionnaire can often become misaligned gibberish. We have abandoned attempts to use either one. Both also lack the sheer impact of a FedEx envelope and thus earn lower response rates.

(Another approach is setting up an interactive Web site, with built-in questionnaires and presentations, and sending out e-mails with instructions for logging onto the site. Technology for doing this is just now becoming inexpensive enough and easy to use to make this viable and we will be testing such tools in our next projects. Properly done, the cost should be competitive with express service delivery and the increased time to set up the site will be compensated for by the reduced time needed to analyze the results.)

One recent study sent via FedEx dealt with a brokerage product designed for a company's best clients. In the questionnaire we asked these clients to rate their satisfaction with the company's present product and to provide, if possible, examples of other companies who had better products.

We have found that properly motivated respondents will easily fill out a four-page (or even a six-page) questionnaire. (We have also found out that many will accidentally skip over the middle pages of a questionnaire, so we provide multiple reminders that there are inside pages.) We keep these questions as simple and direct as possible and minimize open-ended responses...although we always include a final open-ended question to allow respondents to feel comfortable that their opinions are being heard. A particularly effective procedure involves letting respondents circle as many words as they think apply to a product, ending up with a multivariate response grid of rich complexity.

As in all self-administered surveys, it is important to avoid ambiguity or excessive subtlety. Many respondents proved unable to distinguish between a product offering being "simple" and being "simplistic." None of this is news to those who regularly use such questionnaires but may be overlooked by qualitative researchers used to being able to discuss answers with their respondents.

The answers must be submitted a few days before the actual group. Yes, I know...sometimes they're not even recruited until the day of the group, but you want these questionnaires back in sufficient time to integrate what they tell you into your sessions. Typically, a questionnaire will contain questions about reasons why something can't be done, barriers to acceptance and related problems. By having these in place before the

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group starts, one can focus on how to overcome barriers rather than spending time learning what the barriers are.

In many ways, this is the most useful aspect of this technique. Rather than spending time determining reasons for rejecting a new concept - which, to be frank, are usually obvious before the group has begun - the group can be presented with a list of objections drawn from their own comments. Because these objections are indeed from the group, they are accepted without difficulty and time is more productively spent discussing ways to overcome such objections. In addition, often unexpected objections may surface in the questionnaires, and time can be allocated to exploring these objections in detail before examining how best to overcome them.

Thus, one goes into the focus groups knowing how the respondents now feel, what issues face you, and what must be done to overcome internal and exterior barriers to acceptance. Such specifics provide excellent places for effective group discussion, and a session will typically end with the group having both a good understanding of what is being evaluated and a cogent set of arguments for that good or service.

### The "post" work

At the end of a discussion session, respondents are sent off with a final questionnaire and an addressed FedEx return envelope. Again, response rate is very high, and the few who fail to return the envelope will almost always do so if called and reminded by telephone.

The "post" questions fall into two categories: we re-ask several of the key questions from the first questionnaire, to determine if exposure to whatever has been shown in the group has effected a change in perception. And we ask key purchase and interest questions: Would you buy this? For how much? Is there a price at which you would buy it and a price at which you wouldn't? What are they? These answers, prepared after thought and at the respondents' leisure, uninfluenced by others in the group, provide the best measure possible of true purchase interest...always with the caveat that the respondents actually be representative of the target population as a whole.

The final result, in addition to improved efficacy in the groups themselves, is a solid measure of changes that have occurred because of exposure to new products or ideas and a not-unprojectable measure of new product acceptance.

It is worth emphasizing that this technique does more than just provide a reasonably projectable form of mini-survey; it also greatly enriches the focus group itself. It does this by concentrating the respondents' minds on the subject at hand, eliminating much extraneous discussion at the start of each group, and - most of all - allowing the moderator to tailor each group to its unique wants and needs. | Q

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# A map for a good trip

## Suggested stops along the road to successful client-facility relationships

By Rea Kolski
and Bj Kirschner

The road to which we refer in the subhead of this article has many twists, turns and bumps, but in the end we all want to get to the same place: The Land of Successful Client-Facility Relationships. Perhaps the best way to build a smooth road is to visit some of the stops along the way.

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*Helpful hints to facilities*

- If you have very strong convictions that without substantial modifications up-front the recruiting effort will fail, do not take the job. Knowing your market and what it can and cannot produce is expertise on which your clients should rely. But, do not just say no to a project without providing your client with reasons why or suggestions on how the project might be accomplished. Sometimes reasons for not accepting a study can be findings in and of themselves. Fact-based refusals are well appreciated. It is usually better to disappoint a client by not taking the job than by failing at the job.
- However, if you decide to attempt the recruit, communicate with the client about all your concerns very early and in writing. Surprises are often worse than expected bad news.
- Think through all the different approaches you can take to help accomplish the task (i.e., buying a list, networking, properly constructed ads, choosing appropriate days and/or times, etc.) and communicate these to the client. Be sure to include these costs in your estimate.
- Once recruiting has begun, keep the client informed of the progress (or lack of it) often and in writing. Be sure to include all the innovative and proactive actions you have taken so far. Do not be shy in relaying any news. If the client has your well-presented ammunition, it can only help them in making decisions about the rest of the recruit.
- Be flexible about late-in-the recruit changes when they are doable and don't adversely effect other in-house recruitment efforts underway.

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- But if the client does make extreme changes to the specs in the middle of recruiting, and this causes loss of recruits and adds difficulty, you have the right to say, "Sorry, it's just not possible."

*Helpful hints to clients*

- Be reasonable about how unique these people really need to be. Incidence of use does not necessarily or easily translate to incidence of recruiting. There are additional qualifying criteria, as well as the unknown availability factor. Added tools like algorithms or specs meant just to push through ideas tangentially related to the recruit can make even the easiest recruits difficult.
- Do not complicate the recruit with long screeners or convoluted questions with no real qualitative importance. On the one hand, you do not want the screener to be so simplistic that any respondent could figure out the key to the research, but on the other, remember that recruiting is done by phone and after a certain amount of time, respondents are less likely to be cooperative, so the more honed the screener, the better.
- Offer incentives commensurate with the uniqueness and stature of the guests. Facilities are usually willing to work with you on costs, but the incentive is the most important item they have to offer potential guests and it needs to stay firm.
- Listen to and accept suggestions of the facility you have chosen. They know their market and its nuances.
- Understand that the facility is your partner in the effort and wants to succeed as much as you do.
- Do not change the job once recruiting has begun. It is hard enough to recruit unique people without having to start all over again (sometimes several times) in the middle of a job. But, if it is absolutely necessary, understand that costs are involved. Screener changes can result in loss of recruits. Disinviting guests and finding new ones to replace them in a short time is very tricky.
- Try to round up facility bids before bidding to your client. This will cut down on the surprises you might find in costs when the facility actually sees your recruit. Facilities cannot always be expected to adhere to a budget that is unrealistic to their own budgets and which they may not have known about up front.
- Play an active role in your recruiting process. Opening and reading all updates takes time, but they often contain important information. Waiting until the last minute to really check a spreadsheet might make it too late to re-recruit, if necessary.

**The Sure We Can Inn**

This is a charming stop where clients can, with enough notice, order special equipment, services or professional assistants.

*Helpful hints to facilities*

- Be sure your equipment is tested early every day, even if the study is not until late in the day. This will allow enough time for repairs, if needed.
- Be sure your staff is well trained on how to use the equipment and how to troubleshoot if it is not working. Clients expect facilities to know their own equipment (as well they should), so a blank stare 10 minutes before the group is scheduled to start is never appreciated.
- Set up relationships with more than one vendor for each type of client request (A/V, computer, professional assistant, etc.) so that if one cannot meet your needs, you have others from which to choose.
- With VCR and TV prices as low as they now are, consider having a unit per room and even an extra on hand.
- Look into buying hub units for high-speed access. This will allow more people to utilize one jack for accessing the Internet.
- Ask your clients up front if they will have special needs during the study. Ask specific questions about equipment, products to purchase, staffing requirements, briefing and/or debriefing times, etc. Often, if the question is asked early enough, the answers come early also.
- Be sure to specify costs of any extras. If the client asks for equipment to be ordered, get approval of the cost. It is unfair to just add something on the bill that could have and should have been approved early on. Of course, there are times when the request is very last-minute and this is just not possible.
- Be sure your bid lists normal extras (i.e., copies, shipping, respondent food costs, duplicating tapes, etc.).
- Do not promise what you absolutely cannot provide, but be flexible and try to find a way to help.

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A can-do attitude is much more widely accepted than a "we won't even try" one. Work with the client on their special requests and let them know the efforts you have put forth. Remember though, as above, if you do need to say no, provide a reason why and put it in a positive light.

*Helpful hints to clients*

- When your bid is worked up, most facilities incorporate arrival an hour before and departure an hour after the groups into the facility rental charge. If you will need more time, facilities appreciate the heads-up. When clients arrive four hours early, especially those needing assistance or wanting to eat, it impacts every area of the facility. Someone has to be made available to help. This is not only a cost issue, but also a time utilization issue. This person's other work will not get done that day.

Also, the room may not be available and the facilities may not have anywhere else to make you comfortable unless they ask a staff member to vacate his/her office. You can surely understand how difficult this is.

Staying more than one hour after the last group ends presents another set of difficulties, especially at night. Many buildings request that everyone be out by 11 p.m. Many staff members have arranged for rides home and are being picked up about an hour after the end of the last group or just cannot stay for longer than they have been assigned. However, if you let the facility know up front that you will need to stay later, it can make arrangements accordingly.

- Understand that facilities are not audio/video or computer companies. They have their own equipment with which to record your sessions. Many also have one or two playback units on which you can show commercials to your respondents, but you must notify the facility at the time of booking or at least a few days before the groups if you are going to use these units. If not, you run the risk that they will not have one available when you arrive. (In other words, two playback units for three rooms may leave the client who has not given prior notice without a unit to use.)

- If computers will be needed to conduct the study, please allow enough time for the equipment to be ordered. Many facilities do not always have extra computers around for study use. When requesting a computer, be sure to specify exactly what will be needed on the computer (i.e., modem or Ethernet Internet access, specific software, processor speed, etc.). Also keep in mind that many computer rental companies do not allow programs to be loaded onto rented computers.

- Backroom Internet access is usually available. However, there can never be enough jacks. Some clients still want dial-up, others want high-speed. It is extremely expensive to provide jacks and access for everyone. Please be willing to share, perhaps using a hub that many facilities have purchased. Ask the facility up front if they have wireless Internet connections.

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- On the same topic, if you have corporate firewalls on your computer, it is not the facility's problem if you cannot connect. Please ask your IT person to give you written instructions on how to connect; facility staff members will most likely not be able to break through the firewall.
- If you plan to use a Web site during your research, it might also be a good idea to bring a backup CD-ROM of the site in case a modem line is down or running slowly.

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- If you will need a videographer, notetaker or other professional assistant, please give enough notice. These people are in high demand and cannot always be booked on short notice.
- If you need secretarial assistance before the groups, please ask for it well in advance of the group's start time.
- Shopping lists for products necessary to the study also should be supplied ahead of time (at least two days before the study). This is not only a personnel issue, but also one of finding the product. Not every product is readily available, if at all, in every market. It is very frustrating to search for a product only to learn that it is not sold "in our area." Arriving at the facility on the day of the study, expecting that "someone" can drop everything and run a shopping errand, and run it quickly, is not reasonable or productive. Often the end client who is sponsoring the research wants its own products to be purchased, so if they can ship them directly, that is always a big help.
- With all "extra" requests understand there is a cost. If the facility knows about the request up front, they should give you the cost up front. But, when they happen last-minute or close to it, that is not always possible.
- Sometimes someone in the backroom asks for copies or extra food. Facility staff members cannot always reach the "booking client" to ask if that's alright but want to be of service to your client. If you do not want us providing these extra services to your clients (because the item may turn up on your invoice), please let us know and we will indicate that to the backroom clients if that comes up.

### The Aim to Please Cafe

*Helpful hints to facilities*

- Know what food types are available in your area. If a client requests something that you know you cannot get for them, let them know. Do not play mealtime switcheroo on them without prior notification.
- Set up good relationships with several restaurants in your area. Explain the importance of quality food, on-time delivery and extras. This can be a very lucrative business to local restaurants. When choosing a new restaurant, order a demo of their food for your staff to taste. This way you can test the quality and give accurate recommendations to clients.
- Be informative. Let the client know how long a restaurant takes to deliver. Do not tell them it will be there in a shorter time just to "keep them happy."
- Have a good variety of soft drinks on hand. Have plenty of coffee ready at all times. Small refrigerators in client rooms stocked with beverages are always appreciated.
- For clients making last-minute food choices, have a menu binder available. Only have viable choices in the binder. Remove menus from restaurants that won't deliver, or that have gone out of business. If you know a restaurant is closed on that specific day, inform the client up front so they don't even look at that menu.
- Try to keep in mind special food requests that revolve around dietary restrictions. The requests may seem odd to you, but they are very important to the clients, so if they can be met, make all effort to meet them.
- If you want to help a client make food choices before they arrive, have someone on your staff call them to discuss options. Recommendations are always helpful.
- Be sure a staff member cleans up dirty dishes and food service items at every possible interval without interrupting the clients that are observing the groups. This helps avoid accidents and also gives the clients a clean environment in which to work. If a client insists that food remain hour after hour, there isn't much you can do, but always try to at least suggest removing it.
- Be sure to ask your client what he/she would like done with leftover food. Many clients, especially if they are from the local area, appreciate having it wrapped to take home.

*Helpful hints to clients*

- Please understand that not all ethnic food types are available in every market. If your study is taking you to multiple locations, choose the food accordingly. Larger cities usually have more variety from which to choose.

- Try to get food orders to the facility a day or two before the groups. This allows enough time to arrange for timely delivery of your meals. While facilities are willing to provide menus to choose from at meal time, it does require patience on the part of the backroom clients. Good restaurants are often busy, so on-time delivery cannot be guaranteed. Also, when menus are provided, it is important to limit the decision to two restaurants (at least two people ordering from each). Few restaurants will deliver small orders.

- Some foods (sushi especially) take a long time from call-in to delivery. If your clients are sushi lovers, please understand that 90 minutes is the norm.

- Special diet needs cannot always be met on short notice. Please be as quick as possible when such a need exists. If you do have special dietary restrictions, try explaining them to the facility so they don't inadvertently make a mistake.

- Special occasions are happy for everyone. Let the facility know if you will need a birthday cake, or if someone is observing another special date.

- Please let a staff member know if something has spilled on the furniture or carpet. The quicker it can be cleaned, the less likely the damage will be permanent. Accidents do happen, especially in the dark.

- If you know your client is part of a conglomerate that might not be known to everyone, please let us know. We don't want to serve a competing brand if we can help it.

- Some requests are really beyond the scope of service. One such request comes to mind: "Please only serve yellow M&Ms. Remove the rest from the bowl." Do you really want someone to pick through the M&Ms first? Perhaps the person who likes only yellow can do the searching. Another client had his own way of dealing with color choices when blue M&Ms first came out: He just took them all out of the bowl and threw them across the room because it was not the color he had chosen. If we could get the blue client and the yellow client to agree, one could do the picking for the other.

- The facility, while choosing the restaurant, is not responsible for the food. While the food charge can be adjusted if it is not good, please remember that the adjustments made are for food dissatisfaction only. The facility will make the restaurant accountable in most cases.

### Good communication

The most important part of the entire trip on the road to successful client/facility relationships is two-way communication early and often. With all the ways to keep in touch available, there are few, if any, excuses for not returning calls or e-mails in a timely manner. In the end, we all want the same results: high-quality research. | Q

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# Can we do better screeners? Of course!

## Tips from the field to improve your yield

By Chris de Brauw

In an organization the size of Fieldwork, our 15 offices see literally thousands of screeners each year. Some are of better quality than others. Faced with today's competitive environment, qualitative research users appear keener than ever to get exactly the right respondents in their groups, IDIs and ethnography studies. As a result, recruiting gets exacting scrutiny. So the tool we give the recruiters represents a key stepping stone towards a successful project.

As the users of so many screeners we thought it might be a good idea to do a bit of analysis and come up with specific suggestions on how the process can be improved. To this end, we asked each Fieldwork office to complete a questionnaire with the following questions.

- Screener length: At what point is a screener too long? For example, so long that people stop being cooperative and/or stop listening to the questions? Do you have a rule of thumb (x minutes, or x number of pages, or x number of questions)? How many "for information only" questions are reasonable?
- Question order: What is the better order of questions? Have the narrow qualifying questions early on, and then get general background data? Or the other way around: Get the broader background data first, and only then the real qualifying questions?
- Quality of questions/consistency of answers: What types of questions are "impossible" for respondents to answer accurately and/or consistently (i.e., that may cause different answers when people are being re-screened)? What type of info is more likely to change between screening and re-screening: behavior or attitudes? What kinds of questions invite untrue answers? If you have some examples, that would be great.
- Articulation questions: Which ones are "impossible" to do, and/or intimidating for respondents? Which ones tend to work?
- Homework assignments: What types of pre-group homework assignments are burdensome for respondents, and what are the kinds of homework assignments respondents love to do? What techniques are available to make sure respondents do their homework in the manner that was intended? What are the things to avoid when requesting respondents to do homework?

*Editor's note: Chris de Brauw is executive vice president at Fieldwork, Inc., a Chicago research firm. He can be reached at cdb@fieldwork.com.*

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- Algorithm screeners: What are some of the more and less effective ways to set up algorithm screeners? Which ones tend to be doable and which ones tend to become impossible? What should we advise clients to consider when looking for respondents on the basis of an algorithm?
- Recruiting for ethnographies/remote locations: What special considerations are there for recruiting respondents to participate in a study in their home, while shopping or in some other venue? What are the dos and don'ts?

There was tremendous interest in our organization in this project. In most of the offices a group of supervisors and recruiters created their answers collectively.

The following summarizes the responses, with the exception of the responses to the question about algorithm screeners. This topic deserves a separate article, which we will prepare in the near future.

### Highlights of the findings

*A screener should serve as a screener, only or primarily.*

It can include some "for information only" questions, but a screener is not a data collection tool. It should identify the right people to provide the desired information. It should not complete most of the interview ahead of time. Qualitative screeners rarely produce usable data, in the way a quant study does.

*A screener and screening interview is a form of communication in and of itself.*

As respondents progress through the questions, the screener will reveal the topic of the study (to a degree at least). Screener questions may cue respondents into undesirable behaviors, such as stimulating "lapsed users" of a brand to try it again. (While the intent of the study was to interview lapsed users).

The screening interaction may also, inadvertently, create expectations of what the actual research will be like. It can reveal the tone of the study and the type of interview the respondent might expect: Will it be detailed, repetitive and boring, or will it be interesting and personally rewarding to participate? The quality and length of the screener affects the quality of the conversation between the recruiter and the respondent. And this again can have an effect on the respondent's enthusiasm in participation.

*A good screener motivates both the recruiter and the respondent.*

In constructing screeners, it is useful for the writer to visualize the exchange between the recruiter and the potential respondent. In most cases, recruiters will have identified the organization they are calling from, and the potential dates for which the respondent might be eligible. To enhance the remainder of this process, a good screener…

- is not too long, and is relatively easy to administer (i.e., it is put together with some care, checked for skips, proofread, etc.);
- is conversational, in consumer language, not in industry-speak;
- is matched to the age, lifestage and status of the respondents (kid questions for kids, respectful questions for business leaders, etc.);
- identifies major screening criteria early in the interview, avoiding terminates at the very end;
- minimizes error: has clear, labeled response choices and avoids questions that can only be answered by wild guesses;
- does not anger, intimidate or bore the respondent;
- is detailed enough that a trained recruiter "knows" whether the respondent will be productive or not.

Finally, focus groups, and, generally, the entire field of market and opinion research are better known and understood by consumers and B2B respondents than in the past. This is especially the case in the major markets where most of the research is conducted. People tend to know what focus groups are, and that they have to answer a number of questions in order to meet the requirements of the study they might participate in. With this general awareness comes the obligation from us, the industry, to treat people with respect. The MRA code says "Respect people's time."

### Detailed results

Screener length

A majority of our offices felt that a screener should require about 10 minutes or less to be administered. If the screening interview takes longer, respondents tend to lose interest, become sloppy in answering the questions or get angry. Amazingly, many questions are added to screeners that merely collect data with no bearing on qualification. The value of such questions is usually quite marginal, and, if there are a lot of such questions they can have a definite negative impact on respondent attitudes.

Some of the offices felt that 15-20 minutes is still quite appropriate for completing a screening interview. Some "information only" questions are fine, so long as there aren't too many. However, if there are instructions to the respondent (e.g., for a homework assignment), this should be planned as part of this 20-minute limit.

Once the screening interview becomes longer than 20 minutes, and especially more than 30 minutes, the entire relationship between the recruiter and the respondent becomes strained. It is poor PR to keep respondents on the phone for a long time. We want to avoid creating an impression that we "got the information we needed and then terminated them."

So our suggestion is to look for ways to eliminate time-wasting questions and approaches in qualitative screeners. For example, how many products and brands are needed to disguise the client brand? Too often, it seems, researchers are tempted to take an already existing set of questions, or question grid, and throw the entire battery in the qualitative screener. This may produce four questions for all 12 brands listed, while the answer to only one of those four questions is relevant for screening purposes. Similarly, an extensive battery of attitude statements may be included, but how many of these are actually required to determine qualification of the respondent?

If it is desirable to get a lot of product use information or other background data on each study respondent, consider creating a form for respondents to fill out while at the facility. Once at the facility, respondents are willing to give time. We must try to avoid destroying the respondents' patience while on the phone.

Question order

If at all possible, position the key qualifying questions early in the screener. It is not only efficient in the sense of allowing the recruiters to complete more dialings, it also gives a better sense of how hard or easy a study will be to recruit in general. If terminates come early, respondents don't feel like they have wasted a lot of time, and will be more willing to be screened for another study in the future.

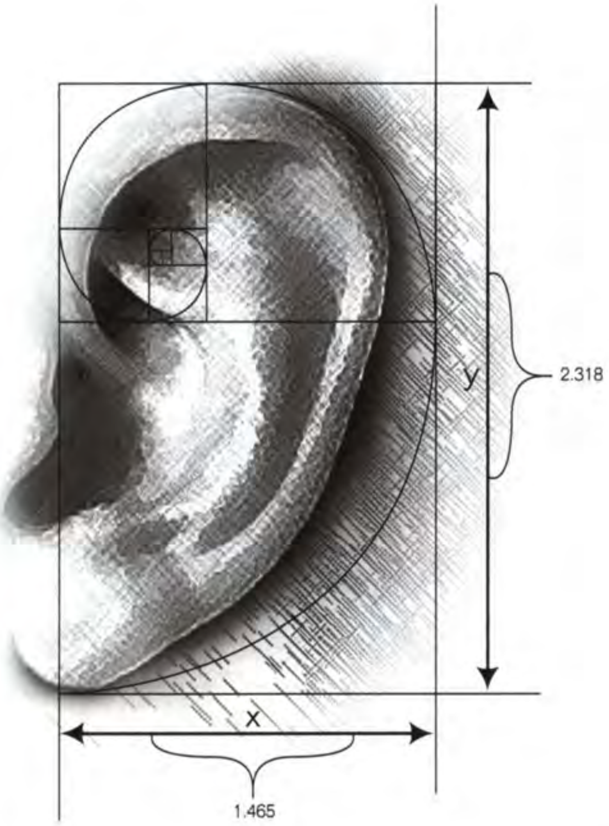
Questions to avoid: guesses

Questions that are impossible to answer lead to problems in qualitative recruiting. Here are some verbatim responses we received from our offices:

- *"How can anyone remember how many times she has bought Ruffles, Pringles or Lays in the past six months?"*
- *"People don't know how often they have been to a certain store in the past three months, or how many times out the last 10 times."*
- *"You're sure to get wild guesses and the answers will change as you re-screen (the second time around she may have thought about it)."*

Asking people how many times they have done something, especially over a fairly long period of time, like the past three or six months, forces them to guess. Guesses are fine if you are in the quantitative data collection business, but not when you are screening for a particular respondent.

A screener is not a quant data col-



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lection tool, but clients often give us quant questionnaire questions to screen people with.

Here's the problem: If you ask 100 people a certain question for which they have to give a numerical scale rating (any number between 1-10), or a frequency guess, the average of those 100 responses is meaningful and reliable. Ask another 100 similarly chosen respondents the same question and the same average will come out. As long as respondents' "errors" are random, the average of combined answers will be reliable, which is what quant researchers want.

Unfortunately, the apparent "accuracy" of the average creates the false expectation that every respondent's answer is "accurate." But on an individual level, this just isn't true.

On an individual level a numerical rating or frequency guess is not reliable. A respondent may give you a "6" on a rainy day, and an "8" on a sunny day. In qualitative screening, the numbers approach is unreliable, and should be avoided as much as possible.

What to do instead? We suggest using simple scales, with verbally labeled scale points. People will remember their perceptions and emotions better if you don't give them too many choices:

"One of my favorites." "It's OK." "Poor."

"Definitely." "Maybe." "Not."

"Agree." "Disagree." "True." "False."

"More than once week." "Once a week." "Less than once a week." "Less than once a month."

The point is to keep scale levels simple. Just enough to define whatever your screening criteria is: committed user vs. marginal or lapsed user, etc.

If we give respondents too many options, like seven or nine different levels of purchase interest or agree-disagreement (like in "definitely," "somewhat," "slightly," "I might or might not," etc.) it becomes mush in respondents' minds. A greater number of scale levels do not make it easier to identify trier-acceptors and trier-rejectors. To the contrary, it makes matters more confusing. The respondent will give an answer, but you cannot be sure you'll get the same answer in re-screening.

### Articulation questions

A screener definitely should include more than just closed-ended questions. Open-ended questions allow recruiters to identify respondents to be avoided: people who are uncooperative, unable to express themselves, have language problems, thick accents, speech impediments, etc. At the same time, some open-ended questions can build positive expectations towards the real interviewing event: that there is an interest in the respondent's personal opinions and feelings.

Articulation questions go beyond simple open-ended questions. They are, generally, a good idea, especially in consumer studies. Articulation questions can reassure researchers that respondents will be productive, cooperative, not prone to shy away from answering questions that are less than totally predictable, and able to communicate their personal experiences and perceptions.

The issues with articulation questions have to do with their purpose: Are they intended to ensure articulateness of the respondents, or is the client looking for highly imaginative and creative respondents?

A number of commonly used articulation questions appear to be geared more for identifying highly imaginative or creative respondents. They can be quite off-putting to others. Perfectly articulate respondents may be stumped by questions such as:

- How would you describe a sunset to an alien?
- Give me 10 (or 18 or 30) ways to use a paper clip (or brick or rubber band).
- Which celebrity (or person in history) would you invite to dinner and what would you talk about? (This is especially hard when it

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involves a dead person.)

There may be many circumstances where it is desirable to have productive, verbally expressive - but not necessarily highly creative - respondents. If this is the case, we suggest using articulation questions that make respondents talk about their personal experiences and preferences, rather than about something totally unexpected, and out of the blue.

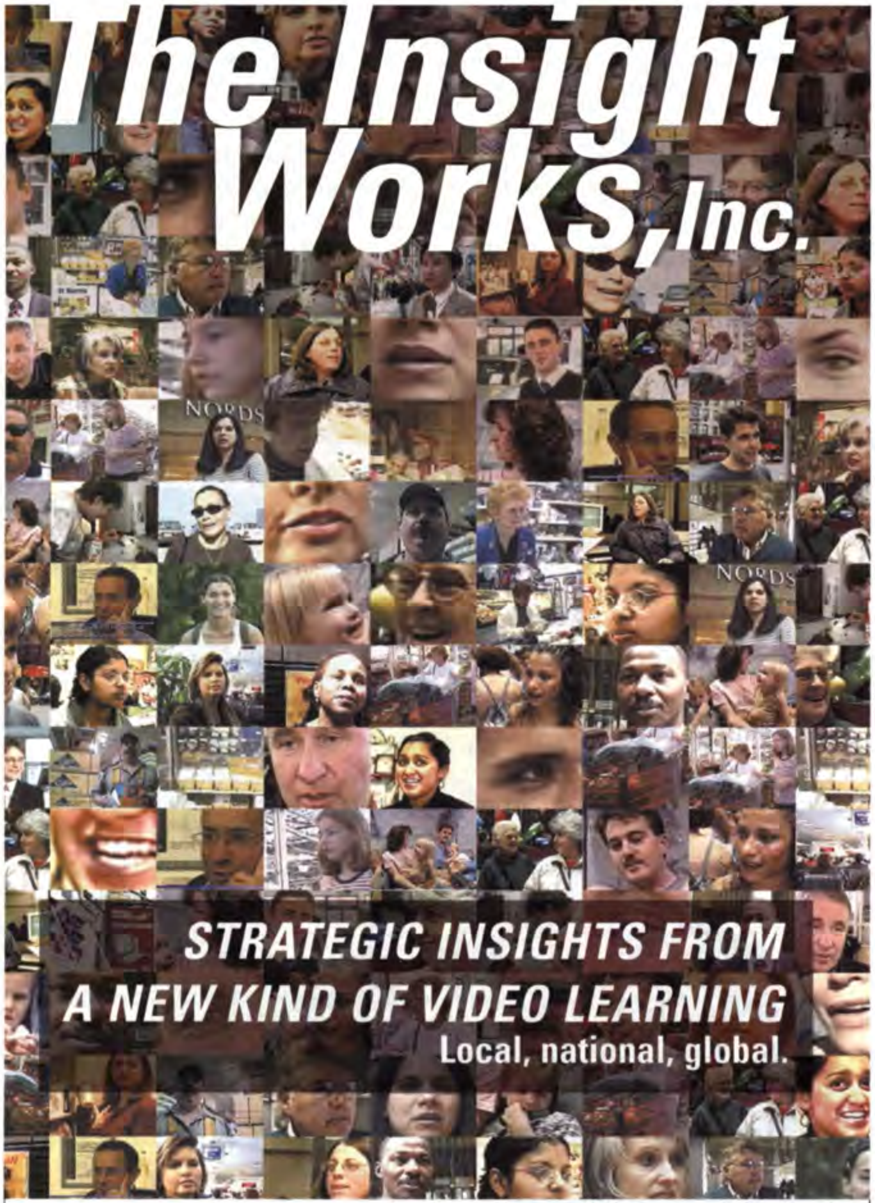
It is also a good idea to match such questions to the respondent's age or life stage. Ask women about shopping, or their vacations; men about hardware stores, their cars; teenagers about music and movies. And have a follow-up question like, "What was the highlight for you?" or "What is most important to you?"

Here are some verbatim responses from our offices:

- *"An articulation question should be one that (almost) everyone feels comfortable answering - one that does not require deep thought on a different topic. Respondents may become intimidated. (Think about where the respondent is, on the phone, with kids running around!)"*
- *"The better articulation questions are those related to the topic of the screener. It is difficult to switch gears if a respondent has spent 10 minutes talking about soap products, and we suddenly ask them about their favorite celebrity and what they would want to talk about at dinner with him/her."*
- *"Avoid what we call the Barbara Walters question: 'If you were a tree what would it be?'"*

For consumer studies we do recommend using articulation questions, but make them fit the purpose. Distinguish between the need for productive, well-spoken people vs. the need for creative individuals. For B2B respondents, on the other hand, we are not so convinced that articulation questions are required. B2B respondents can be expected to be knowledgeable about their field, and, as a result, able to say lot about it.

Finally, regardless of whether an articulation question is used or not, the trained recruiter must use judgment as well. On the basis of the



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conversation with the potential respondent he or she must know whether the respondent is likely to be productive, can carry a conversation, is cooperative, has no speech impediments or heavy accents, etc.

Homework assignments

The idea of asking respondents to do something before the interviewing event, to focus their attention on the topics and issues to be covered, is gaining popularity among researchers. While not technically part of the screener, the explanation of a homework assignment represents an important and time-consuming part of the screening interview experience, both from the recruiter and the respondent's perspective.

The most fundamental thing to remember when plans call for a homework assignment is to allow sufficient time for recruitment and for respondents to complete their assignment before the main interviewing session. If items need to be mailed or purchased, or a store must be visited and shopped, recruitment must be completed well before the interviewing event to allow for such activities. And, when respondents are recruited a week or more before an actual interview, the likelihood of conflicts and cancellations goes up, so this must be incorporated in the planning for over-recruits.

Try to match the assignment to the age and personality of the respondents. Generally, women and young children are more conscientious and reliable than men and teenagers in completing their homework.

*"Men especially are most likely to cancel rather than complete an assignment, particularly if they have to write down what their favorite gray pants mean to them, or make a collage about their favorite toilet tissue. Asking them to bring in a copy of their phone bill is about the extent of what they will do."*

Assume that respondents don't follow directions well. It is very important to keep everything as simple as possible. Reading a page-and-a-half of instructions over the phone is not only wasteful, but not understandable.

Make the assignment interesting. If it is a tedious task, respondents will not give it much effort, and the results will be disappointing.

Some typically successful homework assignments: trying a product; shopping trips (if not too many); clipping photos, articles; watching a videotape; doing something on the Internet; collages, with the right people (not 18-24-year-old males); bringing in an item or several items.

Some problem homework assignments: diaries (especially ones that take more than a few days to complete); keeping track of/recording all activities during a day; complicated or multiple shopping trips; photo and video diaries (although this technique may work with some).

Some more comments from our offices:

- *"Forget about lengthy diaries where*

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*they need to record everything they do in a typical day, week or month. They hate these and don't do them diligently. We had one where we couldn't get hardly anyone to finish it because it was too tedious. The best homework assignments are easy collages, picture-taking, a couple of questions they need to answer, or bringing things with them."*

- *"They always seem to enjoy doing something on the Internet. If you have a technology-based assignment, make sure you have someone available to help with tech support."*
- *"Never make a homework assignment optional."*

Ethnographies

Screening for ethnographies (or, in general, interviews away from a facility) is not very different from other types of studies, except that certain things need to be planned carefully.

It always takes longer than anticipated to get from one interview to the next, so it is very important to allow for enough time between appointments. Directions are often not completely accurate, and traffic conditions can be surprisingly poor on local roads at all times of the day.

It is a good practice to let the respondent know the name(s) of the person(s) she or he will be interviewed by. And those persons should be prepared to identify themselves with a photo ID. Also, it is desirable to let the respondent know ahead of time that the project team will be making photos or a video of the interview.

Finally, never send a man (or men) to a woman's home, unless there is a woman on the interviewing/observation team.

**Crucial link**

Screeners and the screening process should get the attention they deserve. They are a crucial link in the success of a project. Often, screeners are prepared in too much of a hurry, with not enough thought, not enough design, not spell-checked, and not checked for flow after the last revisions to an earlier draft.

Use some common sense, and, in developing a screener, visualize what the conversation between the recruiter and the potential respondent will be like.

As researchers, we are asking people who don't owe us anything to participate in our studies. We offer to compensate respondents for their time, once they qualify and are able to attend, but not for going through the qualification process.

If we make this process unnecessarily unpleasant or difficult, there's a strong possibility that reasonable, well-qualified respondents will give up and decline to participate in a study. This is most unfortunate. It potentially eliminates people who should be included in the research. Moreover, it wastes money, time and the enthusiasm people feel for participating in research, which often can be a rewarding experience. |Q

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# Brand as story

## A tale of two tellers

By Reyn Kinzey

The scene: Not so long, long ago, and not so far, far away, Hungarian farmers, their wives, and their children huddle around a storyteller in a crowded farmhouse. They hang on to his every word as he builds to a climax: "And then, despite all his valiant efforts, the Prince died trying to rescue the princess."

The crowd is hushed. Finally, a small boy in the front of the crowd starts laughing: "You're kidding us, of course. The Prince rescues the Princess, they get married, and they all live happily ever after. That's how the story goes."

Okay, did that really happen in Hungary, and what's it got to do with branding, anyway? Well, while I did make it up, it could have happened, according to folklorists, and it's got everything to do with branding, advertising and market research.

**Brand = a great story**

It's become common to say that a brand "tells a story." I absolutely believe that. I encourage everyone to read Tom Peters' *The Heart of Branding*. He's passionate about the equation "brand = a great story." The idea that we can create a brand like a story is very liberating. It makes us more than mere marketers: suddenly we're creative artists. All we have to do is tell a good story.

Perhaps, but if we are storytellers, that means we are bound by certain rules of storytelling. We sometimes like to think that creative artists have unlimited freedom, but that's not always true.

Back to the Hungarian farmers. Roger D. Abrahams, the folklorist and founder of the Center for Folklore and Ethnography at the University of Pennsylvania, maintained that in a "traditional" society, a storyteller's individual creativity is always in tension with the social constraints of his audience. He has certain creative freedom within the story - the Princess' dress can probably be either blue or red, the audience doesn't care - but if he strays too far, some kid is going to step in and say, "No, wait, that's not how the story goes." The storyteller cannot kill off the Prince.

"But," argues the storyteller, "it's more realistic! I've got to bring these peasants into the 21st century!" And we certainly feel for him. Here's this guy trying to be inventive, move his people forward, and some snot-nosed kid is telling him how to do his job.

On the other side, you have to understand the farmers' position: They are not simply being small-minded or slavish followers of tradition. Linda Deigh, a Hungarian folklorist, studied the Szeklers of Transylvania and their

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society (yes, the ones whose legends led to Bram Stoker's Dracula). She maintained that there is a fundamental unity between traditional stories and their societies: The stories maintain their importance only so long as the societies maintain the beliefs and the world view established by those stories. Once the belief wanes, so do the stories. The stories are the way the people anchor themselves to reality.

**The story of the brand**

By now, you probably see my point about branding, and particularly rebranding. Perhaps consumers don't anchor their reality to brands, but the audience already thinks it "knows" the story of the brand, and if the storytelling brand-maker moves too far away from what the audience thinks it knows, some consumer is going to stand up and say, "No, wait, that's not how the story goes."

It happens all the time in focus groups. We go in with clever, bright new logos and advertising campaigns designed by the best creative talent, ready to move brands into the 21st century, and the consumers say, "No, wait, that's not the brand we know."

We have to tell a story that is within the audience's comfort level of belief. Realizing this fact provides a healthy counterweight to the freedom that the "brand as story" equation can imply.

Some people might object, "But Abrahams was talking about a traditional society. America is far from a traditional society." Well, it is about some things. For example, my experience with testing logos with consumers convinces me that consumers are very, very "traditional" about some things. They think they know their brand stories, and they can be very resistant to change.

I once did a 12-group project with an agency and design firm that had been asked to modernize the logo for a major gasoline company. Gasoline logos are very important, and they are often very well-remembered by consumers, because drivers use the 50-foot high emblems to guide them from the interstate into the station.

The original logo of this gasoline company was good - it told a story - and it was recalled fairly well by participants in groups. But the company wanted to modernize it. Aesthetically, I agreed; it was a little dated-looking.

But a lot of the participants took the "if it ain't broke, don't fix it" attitude. They didn't want any change at all. And they certainly didn't want any major changes. They were particularly resistant to any change in color. The current colors "said" this company, and they wouldn't buy any change. They understood that the use of green in a proposed version might say "ecologically concerned," which might be a good thing to say, but they were not buying it - and not because they didn't believe the company was ecologically concerned. It was just that green wasn't the company's color.

So, after 12 groups and countless revisions by very good graphic artists, we settled on a "new" version so close to the original that most people wouldn't notice the changes unless someone placed the old and the new logo side by side and pointed them out.

I'm not trying to dismiss the importance of the subtle changes that were made. I think they make the logo more attractive, more modern, and it tells the story the company wants to tell, including that the company is "keeping up with the times."

My point is simply that consumers can be resistant to changes in branding because they think they already know the story, and we have to understand and respect that resistance.

And that's been my experience with most of the logos I've tested. The better known the logo is, the more resistant consumers can be to changing it. I would imagine most researchers have found this. In other words, you can't change the story too much, or, at least, not very quickly.

Logos aren't the only way of creating a brand, of course, but I think our experience with them is very illustrative because they are a very pure form of brand-building. A perfect logo "tells the story" instantly with one quick look.

**Mechanism of change**

On the other hand, I certainly don't mean to suggest that brands can't reposition themselves or that companies cannot rebrand themselves. Abrahams himself argued against some folklorists who seemed to suggest that storytelling is always an entirely conservative enterprise; the storyteller does have the power to be a "mechanism of change."

We've all seen that happen with rebranding, but it doesn't happen easily and it doesn't happen overnight. For example, in another project about small-kitchen appliances, I found that consumers were very receptive to a proposed "higher end" product coming from a brand that they thought of as lower to mid-range, because they felt that the brand had been established for a long time and had produced good, reliable products, even if they hadn't been high-end. They reasoned that the company could move to another, "higher" level. It didn't stretch their understanding of the brand story too much. (In this case, it helped that the consumers could see and touch the prototypes which "felt" high-end to them.)

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But because we aren't always sure what "story" the audience thinks it knows about the brand, market research is very important in beginning the branding or rebranding process. (Peters would argue that branding and rebranding a company has to actually begin internally - the company has to determine "who we are" first. I don't disagree, but no matter how much a company believes it is one thing, it's a tough sell if that's not what the consumer thinks.)

Even when consumers don't know a company or a brand - when we are truly creating a brand instead of re-branding - they already think they know the story they want to hear from a particular kind of product or company. Abrahams makes the point: "Even if this is a new story, it must present a progression of actions that are recognizable in their fictional setting to receive approval. The audience will only enjoy and accept what they can understand and therefore enjoy and profit by, and this acts as a conservative force."

In another project, I tested logos for a company that participants did not really know. The company conducts pharmaceutical research, and it wanted to approach doctors more directly. It had a design team put together several proposed logos, and I tested them with doctors in one-on-one interviews. The designs were good, and the doctors liked them, but the question, of course, is not whether the doctors liked or disliked them, but whether they told the right story for a company that conducts pharmaceutical research.

Two of the designs were strikingly creative. They were identical except that the wording in one version was black and in the other design it was blue. From my work with consumers, if I had to choose between the two without market research with the proper audience, I would have advised going with the blue. Consumers almost always prefer color to black and consumers like blue in particular.

I would have been wrong. That's why we do the research. The doctors said that the creative design "said" "innovative," "cutting-edge," and "creative," all the things they wanted to hear about a company that does pharmaceutical research. But adding the blue to an already creative design pushed it too far over the edge and "said" "not solid enough," "not grounded," and the killer: "not responsible enough." (Some doctors even commented that they "liked" the blue version better, but that it sent the wrong message.)

So the details can be very important. Peters makes the point that we always have to ask ourselves, "Who cares?" Often we don't know who cares or what they care about. I said earlier that it probably didn't matter what color the princess' dress was in the opening story. But whether a dress was blue or red was tremendously important in religious iconography well into the Renaissance. In the West, Mary Magdalene gets the red dress; the Blessed Virgin Mary gets the blue or white. Switching the colors would have been unthinkable before the Renaissance. (Of course, this is all culturally conditioned. In the Byzantine tradition, the Blessed Virgin Mary wears patrician purple.)

My point is that branding and advertising are very important and they are creative, storytelling experiences, but they are somewhat constrained by what the consumer thinks he or she already knows about the brand. The consumer, of course, doesn't think that he or she knows the "story" of the brand: they think they know the reality. (Those of us who spend all of our time in the "perception-is-reality" world sometimes forget that most consumers don't live there.)

### Has to resonate

Consumers can be moved and they can change their perception of a brand, but generally, not rapidly, and not more than one step at a time. The story that we tell as we brand or re-brand a product or company at least has to resonate with the story consumers think they already know. And there's no way of knowing what they think they know - or which details are essential to them (whether the dress is blue or red, whether the wording is black or blue) - without the research. | Q

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# How they really think

By Wilson Readinger

## Capturing the context of consumer decision-making

"Most of the time, when I need to go shopping for a new car, I start with the dealer where I bought my current car. I sometimes spend a day or two at the lot, just looking things over - trying to find something that I like. Mostly, I prefer front-wheel-drive, six-cylinder coupes, and there are some options that I look for, like a CD changer and a car alarm. When I find something that I like, I might then compare the price with the invoice figures I can find online for that model and talk to a salesman. I think I'm a really well-prepared consumer, and it's hard to sell me on something I don't want to buy; I don't pay too much attention to advertising. If the salesman can give me a price that's within my budget - which is about $240 a month - and it's the car that I want, then I'll probably buy it..."

This is an excerpt you may hear in a focus group, and there are certainly some measurable and useful pieces of information contained within it, but when your goal is to truly understand the consumer's decision-making process, these data could be virtually useless. This consumer actually paid $310 a month for an eight-cylinder SUV that was purchased 90 miles from his home from a dealer he never visited before the time of purchase. There are two important issues here:

1) When a participant is speaking in generalities or making broad statements, it is easy to miss the reality of the situation; that is, what the participant actually did.

2) In most domains, there is a need to better understand the decisions that consumers are making and how these decisions are actually being made.

Now consider the following variation:

"The last time I went to buy a car, I started with my current dealer. I was looking for a coupe, probably a V6, with a CD changer and a car alarm. When I was on the lot, though, I saw another model and I remembered that it had been on the news because of a recall for some problem with the steering system. I think they make all those cars on the same line in Japan, though, so I wondered if maybe several models would have a similar problem. Anyway, a friend of mine mentioned that he got really good service at this other dealer, so I took the drive and when I showed up there, I just had a feeling that the

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salesman was being honest with me. There was something about the look of the SUV that I bought that seemed right to me when I took the test drive, so I wound up paying quite a bit more than I really wanted to, but I'm very happy with the SUV so far..."

Clearly, there are more feature-and-benefit bullet points that can be taken from the first paragraph. However, the second sample contains the framework for a potentially high-payoff interview that can address some of the fundamental issues of consumer decision-making for companies seeking insight into how products are viewed by their customers. The first paragraph contains the easy answers that many survey respondents would be likely to give; the second provides the building blocks of context and the beginning of an incident, or lived experience in the participant's life, that can be used to ground several hours of a cognitive interview (a structured inquiry into the decision making of a consumer). Within the context of an actual story, the participant cannot hide behind generalizations or tendencies; both interviewer and participant have a common reference point upon which to anchor further discussions of the cognition and decisions that underlie the consumer's behavior.

Most qualitative research techniques are designed to answer the question: What are my client's customers thinking with regard to the product in question? Many research practitioners have tools available that can answer this question with vigor. A subtly different question, though, has some very different implications: How are my client's customers thinking? Addressing that problem effectively requires a different set of tools, a significant investment into mental modeling (uncharted psychological territory for many companies that use primarily focus groups and surveys to collect data), and a different set of expectations regarding the outcome of a research project. However, when executed effectively, the result is a depth of understanding of the consumer that is richer than the client has ever experienced. This new view of the consumer's thinking and decision-making is a firm foundation upon which to build future product design, marketing and research.

## The power of stories

What does it mean for a research method to be incident-based? In short, incident-based methods of qualitative data collection place great emphasis on the actual, lived experience of the consumer. This collection of techniques emphasizes the importance of being in a particular situation with a product (whether that is the purchase situation, the use situation or some other situation that is relevant to the client's research question) and recounting this incident in an interview with skilled, trained researchers. Some have argued that the story is the fundamental unit of human memory, and that the structure and content of stories essentially define culture and exert a huge influence on behavior, opinions and decisions. Incident-based methods are consistent with that view, and take advantage of a consumer's own experience and expertise in making decisions about products. Simply put, an incident-based approach to consumer decision-making retains all the context of the original decision, whether it is the context of time, stress, emotion, uncertainty, the environment, or other factors that we may not even realize are affecting a decision until this interview approach is used. Speculation on the part of the participant is actively avoided, and the interview is, to the fullest extent possible, grounded in actual events.

Part of the uniqueness of this type of approach is that the interviewers are - in most cases - not collecting opinions. In fact, the data that participants provide are usually cold, hard facts. Training in incident-based techniques teaches the researcher to steer clear of responses that take the form of "Usually, X happens," "Some people believe that X," or "Generally, my opinion on X is..." Rather, incident-based techniques rely on the details of the situation in question. Often, questions get at the progression of actual events during purchase and the behavioral and cognitive tasks associated with product use. These elements are always elicited with an ear for key decisions associated with the product. The interview participant himself gives clues to where the critical decision-making is taking place. Phrases like "I just knew," "There was something about it that made me think...," and "I had a gut feeling" indicate that the participant's intuition was called upon and that this is therefore a potential decision point.

How many times have you, as a researcher, heard these sorts of statements? They are common, and they should catch your attention. When an individual has been in a particular situation many times, it is not

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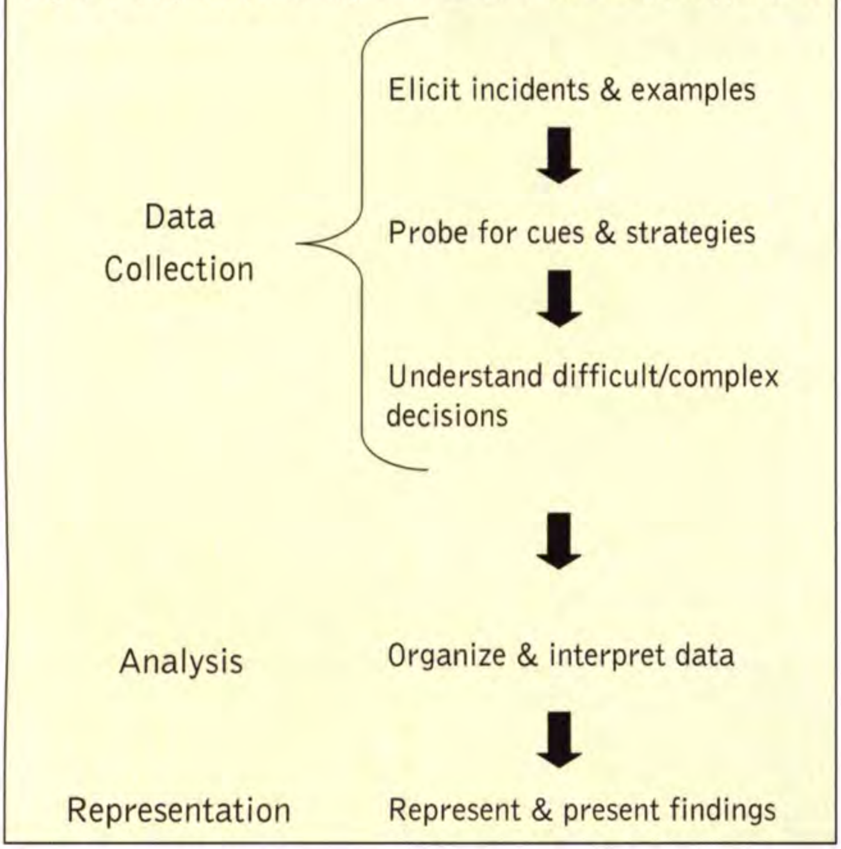
Figure 1: Stages in a Knowledge Audit for Consumer Research Applications


Data Collection
Elicit incidents & examples
Probe for cues & strategies
Understand difficult/complex decisions
Analysis
Organize & interpret data
Representation
Represent & present findings

unusual to have some extra insight into how that situation might unfold. This is true of large-scale, life-or-death, critical decisions, such as those faced by firefighters and F-16 pilots, but also true of everyday decisions made by consumers. What is often referred to as intuition or gut instincts about a product may actually be a reflection of the expertise of the consumer - their experience and mental models of a product unconsciously influencing their behavior. Some incident-based techniques are designed to "unpack" these intuition statements that consumers make all the time, and can help researchers to understand where those gut instincts are coming from and how they can be influenced.

Mental models are the key to understanding how consumers make decisions, and are therefore the key to providing product manufacturers with the insight that they are seeking with regard to their customers. An understanding of consumers' mental models is one outcome of the careful analysis of the stories that are elicited through incident-based techniques. A mental model is really an internal (i.e., residing in the mind of the consumer) representation of the external world; it is the consumer's understanding of how something works. For instance, why choose satellite television over cable? The answer will probably depend on several factors (including cost and availability of the services). While all of these are potentially important, the critical factor may be the consumer's understanding of how these services work: Where does the satellite signal come from? What does my television do with the signals? What types of maintenance are required and why? What happens when the service breaks down or something goes wrong? Investigating actual incidents and exploring the decisions behind critical points can paint a picture of the participant's mental model of the service. This, along with other information taken from the interview, can tell you not just

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### Table 1: Expert Skills Uncovered in the Knowledge Audit, and Consumer Research Application Examples

| Skill | Example in Practice |
|---|---|
| Diagnosing and predicting performance | Assessing one's own ability to use a product or to choose the best product |
| Perceiving critical stimuli | Recognizing and categorizing a situation in order to use past experience and behavior as a guide |
| Developing and knowing when to apply tricks of the trade | Knowing several possible shortcuts for doing a job faster |
| Improvising | Using a product for something other than its explicitly intended purpose |
| Recognizing anomalies | Knowing when a situation does not fall into a category as expected |
| Compensating for equipment limitations | Using some set of skills to overcome perceived barriers to getting a job done |

what the participant thinks about satellite TV, to continue the example, but how he thinks about satellite TV when he makes these decisions.

**The consumer as expert**

One effective technique for a cognitive interview is a knowledge audit. This technique was developed initially to elicit and categorize the major cognitive differences between experts and novices within several categories of military occupations in order to develop training programs that are more efficient in getting novices up to speed. When applied to marketing research, though, the technique excels at exposing the fundamental reasons for purchase, the decision-making associated with purchase and use, changes in the consumer's mental model of how a product works and how to use it, and brand loyalty.

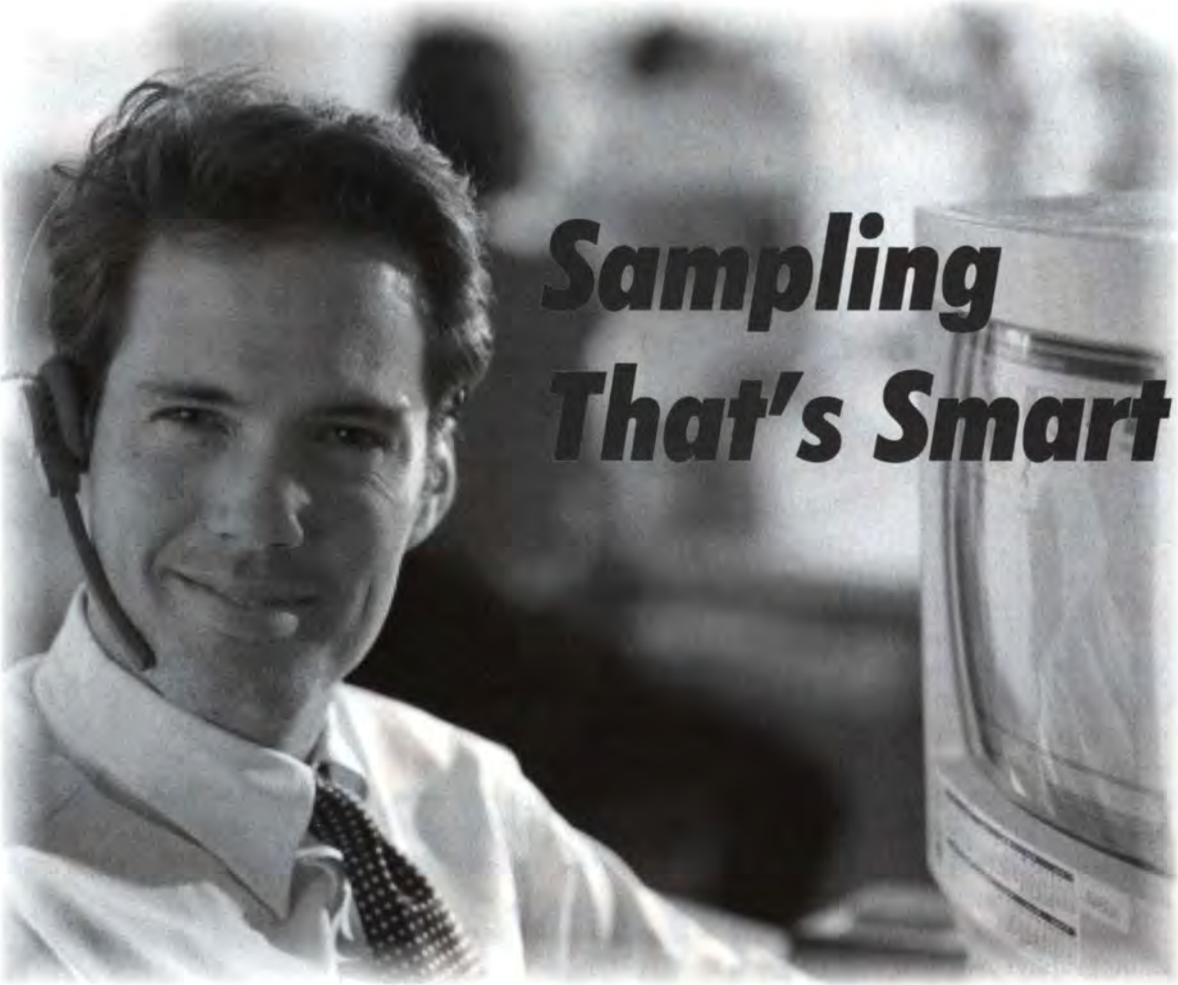
The knowledge audit is organized around knowledge categories that have been found to characterize expertise. Some of these are contained in Table 1.

The knowledge audit employs a set of probes designed to describe types of domain knowledge or skill and elicit appropriate examples in the form of stories or accounts of incidents. The goal is not simply to find out whether each skill is present in the task, but to find out the nature of these abilities, specific situations in which they were required, strategies that have been used by the consumer, and so forth. The list of probes is the starting point for conducting these interviews. Then, the interviewer asks for specifics about the example in terms of critical cues and strategies of decision-making. This is followed by a discussion of potential errors that a novice or less-experienced person might have made in this situation. Figure 1 represents the process of a knowledge audit.

Cognitive interviews last approximately two hours and require two skilled interviewers for each consumer who participates in the research. The two-on-one interview format allows one interviewer to engage the participant and lead the interview while the other takes notes, maintains awareness of the research questions, and adds questions or explores avenues that the lead interviewer might have missed. This approach is time- and resource-intensive, and a team of interviewers working a 10-hour day can realistically do no more than four interviews. Some clients are nervous about the prospect of relying on a sample of 15-20 (and sometimes many fewer) interviews to inform their expensive marketing and design efforts. While history, and some empirical evidence, shows that the method consistently delivers actionable insights that are valid and reliable, there are some additional advantages.

One can be seen in the design of new products or new features in the future. The understanding of consumer decision-making that is gained from incident-based research now can pay dividends in the future when it comes time to test new ideas. Knowing that one segment of consumers dislikes the styling features of an automobile is only directly useful for that particular model. However, knowing that consumers from that segment tend to think of this model of car as a tool for getting work done - and therefore find racing stripes inconsistent with a serious tool - can definitely inform the styling of any new products that will be marketed as tools. Similarly, some alternative qualitative strategies would struggle to elicit information about the relative importance of, for example, point-of-sale advertising versus direct mail for a particular product. If this distinction is important to consumers, it will be a part of the incidents they recount, and it will be a part of their mental models of the purchase of this item.

When it comes to purchasing and using products, all consumers are experts at their own decision-making. Why not take advantage of this experience and expertise, and preserve the richness of the context in which these decisions were made and these behaviors initiated? What is lost in statistical power and breadth of sampling is gained in the depth of understanding and clarity of rationale that can result from a well-executed incident-based interview. "What does the consumer think of this product or service?" is a question that needs to be answered over and over again, but answering the question of "How does the consumer think about this particular product or service?" can produce deep and lasting insights.



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# Try new ethnography-lite!

By Phil Harriau

Market researchers use three basic methods of conducting context-based market research, along with combinations of each, to capture their desired data: passive observational research, active observational research, and ethnography. Ethnography has resurfaced over the last few years as a means of really getting to know the potential customer. The bond that develops between researcher and participant in real-world environments is the key to making this approach superior to traditional central location approaches. But the cost of ethnography is often so great that many companies can't afford to hire a degreed anthropologist who will spend days or weeks in the field. Let's take a closer look at the characteristics of each of these context-based methods, and then see why there are practical alternatives to ethnography and its lengthy, often expensive methodology.

**Ethnography: The how and why**

Historically, ethnography has been the most extensive market research method. Through ethnographic research, we can learn much about how lifestyle, values and culture influence what people buy and how they use products and services. Ethnographers spend time in their customers' natural environments to study interactive behaviors and both spoken and unspoken needs. Often spending days or weeks with people, they observe, ask questions and participate in their daily activities at home, school, workplace, the grocery store, health club or soccer field. Applying the rigors and techniques of social science, ethnographers identify how a brand and/or product reflects people's lifestyle, culture and values.

Ethnographic studies are ideal for exploratory projects where the objectives are initially undefined but become clearer as fieldwork progresses. Ethnography also works well for projects with goals that cannot be attained using traditional methods. For example:

**Observational research is a practical alternative to full-scale ethnography**

- Assessing brand identity for products with strong emotional or personal identification where brand relationships are based on personal values and sense of self, such as clothing, automobiles, personal care products and cosmetics.

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- Revealing new product opportunities through exploratory studies where little real-world data exists about customer behavior and lifestyle as they relate to product use.
- Defining problems, parameters and value propositions that lead to consumer satisfaction.

It's easy to see why ethnography is an expensive method of market research, with its up-close and personal study of people's lifestyles.

### The Hummer: addressing basic human needs?

Let's look at products like fashions, automobiles, fragrances, cosmetics and home furnishings. The decisions we make about products like these reflect our chosen lifestyle and what we hold most dear. Although we may strongly desire these items, one could argue that we don't really need them for our continued existence. Think for a moment about Abraham Maslow's hierarchy of human needs - remember his pyramid ranging from basic physiological needs to higher-order needs that lead to self-actualization?

Now think about a Hummer, or a bottle of $300-per-ounce perfume. Do we really need these items in order to continue thriving, even surviving, in our daily lives? They play more into our sense of self worth from an outwardly-referenced point of view. And tapping into this sense of self worth, or the more fundamental, unarticulated needs that we're not even aware of, is where ethnography works very well. That's why ethnography has become increasingly popular with advertising firms seeking to create messages that resonate with our need for self-actualization.

True ethnography really requires living in a community for a year or so and observing the inhabitants. In market research, ethnography is more compressed - it's usually a day (or period of days) in the life of customers in a setting of interest to the client - home, shopping, work, wherever the behavior is of interest. But it requires multiple visits to the subjects, with extended and lengthy interviews. This method requires time, the cost can be prohibitive and the data analysis is tedious. It can also be a drain on the client's time, if she/he is part of the project.

### Alternative observational research methods

Of course, if you need true ethnographic research, use an ethnographer. Ethnographers are people with formal training in social sciences, typically holding post-graduate degrees in anthropology or having extensive field training under the guidance of someone with these credentials. But, it's a fallacy to assume an ethnographer is needed for every context-based application. Context-based research methods such as passive and active observational research can be very appropriate alternatives - think of them as "ethnography lite"! When a company has issues with timing and budget, using passive or active observational research might be more practical than full-scale ethnography.

Passive observational research involves watching customers as they select or use a product or service. To obtain a benchmark of these interactions, either live observers or video cameras are put in place to passively record these events as they occur. The hidden-camera method has become increasingly popular because it eliminates the need for costly field observers to be in place for extended periods and provides a permanent record of customer behavior. When video cameras are used, placements can be either overt, as in the home or workplace, or covert, as in retail stores, museums, parks, other public settings. These studies uncover the "who, what and when" aspects of product selection. Passive observation can provide the basis for developing displays and packaging targeted to customers' demographics and shopping style.

Here's how passive observational research works in a retail environment. A fixed video camera is placed in one or more locations where behavior of interest occurs. For example, in the case of a study on snack purchases, one or two cameras might be placed in the snack aisle of a grocery store. Usually, people don't know they're on camera. If data is collected for an extended period of time, it can actually become a quasi-quantitative study, looking at traffic patterns, the demographics of people visiting the retail display, the length of stay, and their behaviors with the product. Here are a few of the most significant benefits of passive observational research when the hidden-camera method is employed:

- It's cost-effective; a technician installs a camera and then leaves.
- There is no need to pay someone to do interviewing.
- Motion detectors and timing devices minimize the use of tape, and it's only activated in the targeted space.

Active observational research involves an observer/interviewer watching customers under natural settings - at home, on the job or in a retail environment - as they interact with the given product or service. The interviewer then asks questions of the customers, getting to the "why" of the observed behavior and asking them to describe their experiences. For many products, a straightforward active observational interview is sufficient to understand customers' needs, setting the framework for product development and positioning strategies.

Functional products like houseware items, tools and appliances are well-suited to this method. The most significant advantage of active observation is that it shows real-world customer interactions with products in the marketplace. It reveals the frustrations customers might feel about the products, and modifications or work-arounds they invent that can suggest ideas for new or improved products. Other benefits of this approach include:

- Getting answers to the "why" questions, in addition to the who, what and where provided by passive observation.

- Participants can be probed for a deeper understanding of anomalies and compensatory behaviors.
- The interviewer is free to explore off-topic issues connected to the study objectives.

### Combining the two

A combination of passive observation with active questioning is like "show and tell" and can be very useful for locations such as the workplace, home or retail operation. Here's how it works: the observer watches the customer interact with the products while the behavior is being taped, and then asks the "why" questions directly to the customer. For example, an observer watches a consumer in the grocery store pick up four different boxes of cereal and then select the fourth. The entire sequence is caught on tape, which, as we've already pointed out, captures many dimensions of customer behavior but only answers the "what" question. In order to find out the "why" of the interaction, the observer approaches the consumer and asks a few questions. Often participants are recruited and prepared in advance, but just as often, respondents may be asked to participate on the spot.

When the observation is to take place in the consumer's home, she/he is recruited ahead of time and the entire process is laid out in advance. A camera is installed in an area of interest to the client; for example, in the family room to capture leisure activities. A motion/timer is activated to record behaviors of interest over a period of days, but only when there is actual motion in the room. After a day or two, the family forgets the camera is there and everyone settles into their natural behavior. Once the taping is concluded, the market research company collects, views and edits the tape. They then meet with the homeowners to talk about what they saw, making the entire process a combination of quasi-passive observation and active questioning.

The advantages of active observational research? The client can get to know the habits of their customers - their environment, family dynamics, lifestyle, activities. From the information provided on the tapes, the interview that follows is more meaningful. The interviewer has already become intimately familiar with the family, their home, their routine, and feels that she/he has bonded with the family. Also important, the process answers questions about who makes the decisions and how the family is structured.

### More practical than ethnography

Observational research works well in situations that involve a process, like how a service is delivered or how a product is used; for example, household products, appliances, food preparation, retail purchases and service industries like hotels and fast-food restaurants. The consumer's interaction with the product or service takes place in the environment in which it's being selected or consumed. The market researcher is interested in knowing the consumer's unmet needs, and how the device or product or service meets those needs. Often, the data will suggest product improvements or ideas for new products or services.

Getting back to Maslow's hierarchy, how a product is used and how it meets basic needs are not at the top of Maslow's pyramid. But these are the critical questions that must be answered when new products are being developed and tested. While ethnography can provide insights that go far beyond traditional qualitative research methods, in many cases it can be like swatting a fly with a sledgehammer. Applied in this context, it means that the gap between traditional marketing research methods and ethnography can often be filled by observational research methods that are faster and more cost-effective than full-scale ethnography. | Q

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# Market intelligence versus marketing research

By Ed Crowley

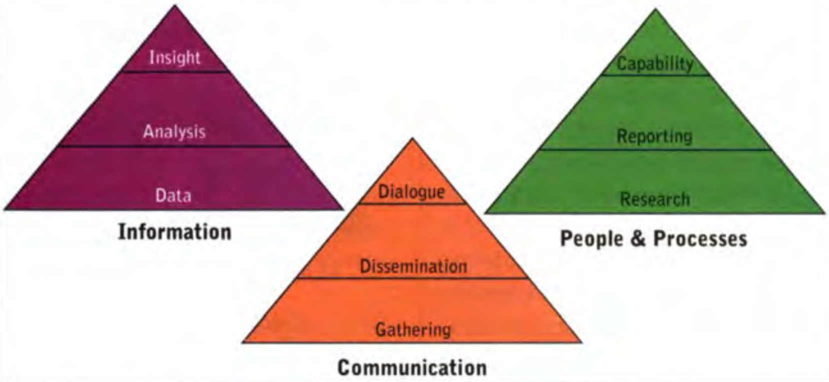
Many companies use the term "market intelligence" interchangeably with the term marketing research. A search of the Internet using the term market intelligence clearly demonstrates this trend, with the search returning page after page of marketing research companies advertising their market intelligence capabilities.

So is market intelligence the same thing as market research? Absolutely not! Market research is a well-defined discipline with a long history of application in the business world. It takes many different forms, and its ultimate goal is to enhance a firm's understanding of the market and customer, but it is not market intelligence.

Market intelligence is a much broader term that can be defined as an ongoing, holistic knowledge of all aspects of the marketplace. One way to visualize market intelligence is to picture a pyramid. Each face of the pyramid represents an aspect of market intelligence. The three faces of the pyramid are information, communication, and people/processes. Each of these faces is built upon a foundation of basic capabilities, with movement "up" the face of the pyramid representing increasing capabilities and proficiency. Market intelligence is the culmination of each of these areas at their highest levels.

The differences between marketing research and market intelligence are as follows:

**Figure 1: The Three Faces of the Market Intelligence Pyramid**



- Market intelligence is all-encompassing. Data gathering is just one aspect of market intelligence. It is a key building block for the information face of the pyramid, but it is not the only building block.
- Market intelligence analysis requires different skills versus marketing research. Market intelligence analysis requires a broad set of analytical skills including business analysis skills. It requires integrating a broad

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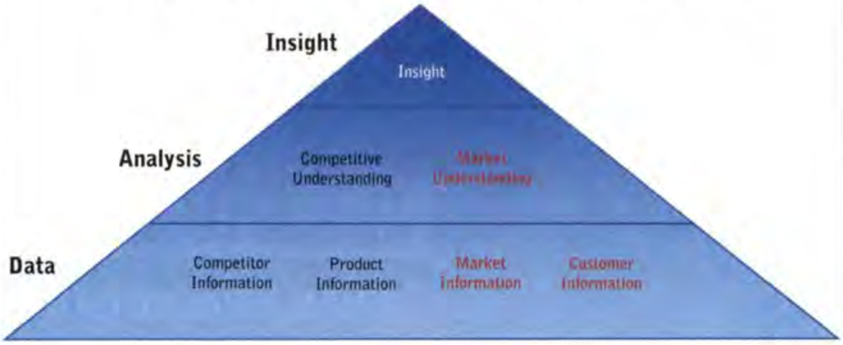
array of information, which extends beyond traditional marketing research data. The analyst must understand the market, key competitors, the financial dynamics of the industry, and the entire business value chain. Often, the best market intelligence analysts have a financial or product management background, whereas many of the best marketing research analysts come from behavioral science or mathematical backgrounds.

- Market intelligence requires integration with all aspects of the business. Whereas marketing research is highly focused on customers, market analysis encompasses the entire view of the market and requires integration into the companies forecasting process, product development process, and other business systems.

The best way to discuss the difference between marketing research and market intelligence is to focus upon each face of the market intelligence pyramid. The information face of the market intelligence pyramid is built upon a foundation consisting of four basic areas: competitor information, product information, market information and customer information. This is depicted in Figure 2.

Figure 2: The Information Face of the Market Intelligence Pyramid



Product information refers to an understanding of the products in the marketplace, how they are priced, and what tactical marketing activities (promotions, advertising, etc.) are being used with these products. Competitor information refers to the understanding of competitors' strategies, organizational structure, product investment portfolio, and future product plans. Market information encompasses a view of the market at a macro level including the current market size, market segments, market share trends, and the forecasted growth of the market and the respective market segments. Finally, and perhaps most importantly, customer information (the traditional focus of market research) involves fully understanding the customer preferences, drivers of customer behavior, brand loyalty, satisfaction rates and any other customer views that impact their behavior in relation to your firm's products or services. It is important to note that each of these areas of knowledge can be a unique discipline in and of itself. However, the real power of the information lies in combining all of these areas to create a complete view of the market, the market intelligence view (Figure 3).

Market intelligence yields an ongoing and comprehensive understanding of the market. Each of the four knowledge areas - competitor intelligence, product intelligence, market understanding, customer insight - interacts to form a complete understanding of the market. Each competitor's strategies will impact their product actions, the overall trends of market growth and segment interaction will impact the strategies, and underlying all of this, the customer's behaviors and attitudes will ultimately drive the market dynamics in terms of growth rates and product acceptance. This integration of all four knowledge areas is the ultimate deliverable for market intelligence. Marketing research is a critical and significant source of information. However, it does not encompass all of the infor-

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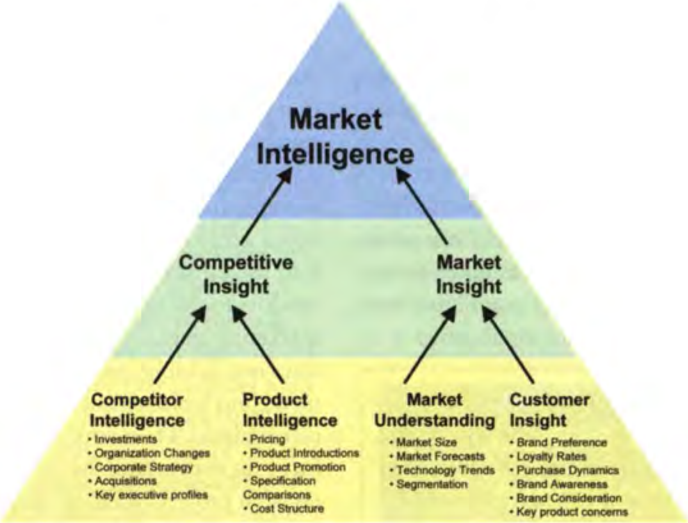
**Figure 3: The Market Intelligence Pyramid**


Market Intelligence
Competitive Insight
Market Insight
Competitor Intelligence
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• Organization Changes
• Corporate Strategy
• Acquisitions
• Key executive profiles
Product Intelligence
• Pricing
• Product Introductions
• Product Promotion
• Specification Comparisons
• Cost Structure
Market Understanding
• Market Size
• Market Forecasts
• Technology Trends
• Segmentation
Customer Insight
• Brand Preference
• Loyalty Rates
• Purchase Dynamics
• Brand Awareness
• Brand Consideration
• Key product concerns

mation areas which are covered by market intelligence. The scope of information covered is one of the key differences between marketing research and market intelligence.

When examining the communication face of the market intelligence pyramid, the most important difference between market intelligence and marketing research is that good market intelligence involves a dialogue between the market intelligence analyst and the client/decision maker. Conversely, marketing research provides an assessment of a specific issue, or measures a specific market dynamic. While it clearly involves communication with the client/decision maker, it typically consists of limited interaction versus the full dialogue of market intelligence.

The third and final face of the pyramid deals with people and processes. This can be the most defining difference between marketing research and market intelligence. By its very nature market intelligence is a process. One which constantly captures information from many difference sources, assesses it, and then uses the information during the ongoing business decision-making process.

Marketing research is typically focused on answering specific questions, or tracking specific issues. While it can benefit from good processes, it is a finite "task" (or series of tasks). Market intelligence is a process, an ongoing interactive process.

This process should be a closed-loop system with a feedback cycle from the executives to the market intelligence team. The executive's feedback will guide the market intelligence team in future analyses by providing insight into the key issues the executives are facing. At the same time, the market intelligence teams

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are constantly capturing, monitoring, and synthesizing information that will ensure that the executive team is not surprised by market developments or competitive actions.

In his book *Business as War*, Kenneth Allard makes a parallel between the business environment and the intense and ever-changing environment associated with a battlefield. In this battlefield environment the intelligence on your enemy's activities is vital to winning, and it must constantly be monitored and updated due to the fluid nature of the battlefield. Obviously, the stakes are lower in business versus war. We are not fighting for our lives like the brave soldiers in the field of battle.

However, we are fighting for territory (market share and customers) against multiple enemies, all of whom have strategies focused on taking territory from our firms. Building a solid market intelligence system is vital to having the information necessary to compete and win in your business battleground. If your firm's focus is only on marketing research, your view of the battlefield is limited and potentially threatens your position in the market.

So what about all of these companies listed under the heading of "market intelligence" in our Web search? A quick examination of these companies' Web pages reveals that most are offering a traditional set of marketing research survey services, as opposed to complete market intelligence services. While market intelligence is an oft-promised capability, frequently companies are simply delivering traditional marketing research services.

So how does one develop a true market intelligence capability? It would take much more than the space in this article to address this question. At a very high level, it involves:

- Having a vision for your market intelligence function. Do you want it to be world-class? What do you want your market intelligence function to excel in? How would you define success for your market intelligence team?
- Obtaining buy-in from your market intelligence team for your vision. This requires a clear articulation of what you are trying to accomplish, providing the team the opportunity to talk about the vision and to actually impact what the final vision is. Working as a team to craft a mission statement that clearly articulates the vision.
- Mapping your vision to a set of core competencies required to fulfill your vision. Identify the competencies that are unique and which represent significant added value by your team. Perform an audit of your market intelligence function in order to ensure your vision maps to your client's needs, and to identify gaps between your market intelligence vision and your team's current capabilities and deliverables. Build a plan to address and fill in the gaps, keeping in mind that this doesn't happen overnight - it can easily be a two-to-three-year process.
- Increasing the focus on building your core market intelligence competencies by outsourcing those elements (i.e., competitive product cost teardowns, etc.) which are not essential to the core. A great example of this is to utilize outside vendors and information distribution technologies to outsource the collection, summary and dissemination of market news data (competitor price changes, promotional activities, etc.). Another example is to use outside marketing research vendors for all non-core aspects of marketing research projects (including sourcing, fielding, project management, and basic statistical and crosstabular analysis). Then your analysts can focus on structuring the initial research project based on their understanding of the business need, and then identifying what the research results mean in the context of the business issues and decisions at hand.
- Creating a process that bridges functional groups to capture information from many different business areas to provide the information foundation for a complete market intelligence picture.
- Ensuring the market intelligence staff has a consulting versus a project management focus (which of course, has implications for the skill sets of your market intelligence staff). This includes measuring the results of decisions made based upon your market intelligence and then fine-tuning future work in order to drive better results.
- Obtaining the mandate of and access to your executive team in order to integrate the results of market intelligence analysis into the business decision-making process, and to capture the feedback, which will drive future market intelligence inquiries and analysis.

Of course, this is much easier said than done. However, with the rigorous application of market intelligence discipline, techniques and principles, you can create a true market intelligence organization that will not only be an integral part of your business decision-making process, but which will also play a key role in shaping your firm's strategic direction. | Q

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## Survey Monitor

continued from page 8

"Cost is important to subscribers, and at least some savings must be a central theme of any successful campaign for bundled services," says William Cheek, an analyst with Parks Associates. "The challenge for service providers will be to not simply underprice their service packages in a shortsighted attempt to stem churn and attract new customers. Instead, they will need to define value to their customers in a way that includes such variables as the convenience of all services on one bill, one point of contact for service issues, and value-added features and applications that can be layered upon basic services."

The study, based on an Internet survey of over 4,000 households conducted by Parks Associates, also found that 74 percent of households likely to upgrade to broadband Internet in the next 12 months would subscribe to a bundled service package that could save them $20 per month for data, voice and video services.

"This is encouraging for service providers," Cheek says. "As more households switch from narrowband to broadband, the number of households with bundled services could increase almost in tandem, provided that providers offer and adequately demonstrate the value - above and beyond cost savings - of these options." For more information visit www.parksassociates.com.

### Football beats baseball as favorite sport

For the second year in a row, professional football leads baseball by two-to-one (30 percent to 15 percent) as the nation's favorite sport. Nineteen years ago, in 1985, when The Harris Poll first asked this question, professional football and baseball were in a virtual tie (24 percent to 23 percent) for first place. With a few small wobbles in the numbers, football (up 6 points since 1985) has steadily increased its following at the expense of baseball (down 8 points since 1985).

While baseball (15 percent) has slipped badly, it is still ahead of college football (11 percent), men's pro basketball (7 percent), auto racing (7 percent), and men's college basketball (6 percent). These are the results of a nationwide Harris Interactive survey of 2,555 U.S. adults surveyed online between September 20 and 26, 2004.

With the exception of pro football and baseball, the numbers of people naming sports as their favorites are not very different from what they were in 1985. However, some sports have moved up and down over the last 19 years. In the late 1990s, when Michael Jordan was at his peak, those picking men's pro basketball as their favorite sport increased, from only 6 percent in 1985 to 13 percent in 1997 and 1998. It has now slipped back to 7 percent.

Men's tennis was the favorite of 5 percent of U.S. adults who follow more than one sport in 1985; it has

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now slipped to 1 percent.

The survey also found some sizable differences between different segments of the population. Pro football has more fans among Generation X, those aged 28-39 (42 percent), in two incomes groups, those with household incomes of $15,000 to under $25,000 and $50,000 to under $75,000 (both 40 percent), in the East (38 percent) and among African-Americans (38 percent).

Baseball does best among U.S. adults who follow more than one sport with household incomes of between $35,000 and under $50,000 (22 percent) and with matures, aged 59 and over (20 percent).

College football is particularly popular in the South (19 percent), among college graduates (19 percent) and adults in more households with incomes of $75,000 or more (16 percent).

Auto racing (which includes NASCAR) does best in the two lowest-income groups with incomes of $25,000 or less (each with 12 percent) and those who never went to college (11 percent). For more information visit www.harrisinteractive.com.

## Bankers improving their service

Informa Research Services, Inc., Calabasas, Calif., has released findings from its Customer Service Index, a normative database reporting on banker sales and service performance. The following findings are the results of bank employee performance from over 7,000 mystery shops, from 20 institutions across the nation.

Audits of bank representatives' sales and service performance show cross-selling, asking for the business, and offering help with future needs has improved sharply:

| | 2000 | 2002 | 2004 |
|---|---|---|---|
| Cross-selling | 44% | 50% | 61% |
| Asked for business | 47% | 71% | 72% |
| Help with future needs | 57% | 69% | 74% |

Performance on softer issues related to customer relations has also improved:

| | 2000 | 2002 | 2004 |
|---|---|---|---|
| Introduced self | 58% | 62% | 68% |
| Ask for name | 64% | 71% | 73% |
| Shake hands | 55% | 54% | 68% |

At the same time, banker discovery skills (questioning) and product knowledge have declined:

| | 2000 | 2002 | 2004 |
|---|---|---|---|
| Discovery | | | |
| Amount of money | 76% | 73% | 66% |
| Verified needs | 59% | 52% | 55% |
| | | | |
| Product Knowledge | | | |
| Suggested product | 88% | 83% | 76% |
| Mentioned features /benefits | 93% | 94% | 87% |

"While bankers are placing more emphasis on improving the sales skills of branch employees, more focus should be placed on employee product knowledge and understanding customer needs," says Paul Lubin, senior vice president, Informa Research Services. "Banks that ensure that employees discuss products based on customer needs are more likely to build long-term customer satisfaction and customer retention." For more information visit www.informars.com.

## Over half of RFID-aware consumers are concerned about invasion of privacy

In a study of over 8,000 consumers conducted by Artafact LLC, Fremont, Calif., and BIGresearch, Columbus, Ohio, 63 percent of consumers who are aware of RFID (radio frequency identification) reported feeling very or somewhat concerned about invasion of privacy issues. Those most sensitive to the issue are men (65 percent) and they tend to be older (35-54 years of age), better educated and higher-income than the general population.

Government tops the list of organizations most likely to abuse consumer privacy information, with 88 percent of those people concerned with privacy believing that the government is the biggest threat to using their information without explicit permission. The government is followed by "crooks and bad guys" according to consumers, as well as banks, insurance companies and credit card companies as additional threats.

Consumers express more concern with privacy issues today than ever before. And with many forms becoming electronic, they are cautious about divulging personal information and are taking active steps to protect themselves such as checking to make sure Web sites are secure before submitting information and shredding paper and unsolicited mail at home. Many believe their personal information is easily obtained by companies through magazine subscriptions and frequent-buyer programs implemented by grocery stores and airlines.

Although consumers recognize the perks of being rewarded for loyal shopping behavior, they are also concerned that their information is not protected and will be shared without their permission. "Almost everyone knows somebody lately who has had a bad experience with privacy invasion, credit card abuse or identify theft," says Linda Stegeman, president of Artafact. "In online focus groups, they recount stories of friends or families who have been affected by institutions or crooks and bad guys getting access to their personal information."

Only 35 percent of consumers concerned about protecting their personal information believe that RFID is a "good idea." However, they also recognize the business benefits of easily tracking merchandise and preventing theft. Many consumers think they will not reap any benefit from RFID technology and are concerned with the potential for misuse, given the "lack of safeguards." For more information visit www.bigresearch.com/rfid.htm.

## Ladies like horse racing

Scarborough Sports Marketing, New York, released an analysis that finds that horse racing is attracting female consumers. Fifty-two percent of loyal horse racing fans are women (loyal horse racing fans are defined as consumers 18+ who are very or somewhat interested in horse racing). The only other sport out of the 23 measured by Scarborough where a higher percentage of loyal fans are female is the WNBA. Fifty-seven percent of loyal WNBA fans are women. Horse racing has experienced a growth in avidity among 18-24-year-olds. Nine percent of consumers 18-24 watched a horse racing event on broadcast or cable television during the past year, up from 5 percent in the 2002 study. This is an increase of more than 796,000 18-24-year-old horse racing viewers. Seven percent of consumers 18-24 in the most recent Scarborough study said they were loyal horse racing fans, versus 6 percent in the company's 2002 study. "The Triple Crown races of the past three years have contributed to increased excitement in the sport of horse racing. As Scarborough data demonstrates, horse racing has undoubtedly found a new fan niche among women and younger consumers," says Howard Goldberg, senior vice president, Scarborough Sports Marketing. "As the sport continues to flourish, marketers, gamers and other racing business partners may have new opportunities with these up-and-coming consumer segments." Loyal horse racing fans lead active, diverse lifestyles. Scarborough Sports Marketing finds that these consumers are 21 percent more likely than all adults to have gone fishing during the past year, 27 percent more likely to have played golf, and 14 percent more likely to have gone power boating. Loyal horse racing fans are 17 percent more likely to have visited an art museum during the past year and 9 percent more likely to have attended live theatre. The data for this report was compiled from Scarborough Multi-Market 2004 (12 months). Data collection periods were February 2003 to March 2004. For more information visit www.scarborough.com.

## Cellphones leave millions out of political polling process

As many as eight million U.S. households could be left out of the political polling process as a growing number of consumers move to cellular phones as their sole means of taking and making telephone calls, according to a survey conducted by the Consumer Electronics Association (CEA), Arlington, Va.

"Number portability, advanced text messaging and voicemail features, and most importantly, falling prices for service plans are all allowing more and more consumers to cut the cord to their traditional landline services," says CEA President and CEO Gary Shapiro. "This trend is without question making it harder for political pollsters to get an accurate read on local, state and national races."

The research, conducted online October 2 through October 5, 2004 among 568 likely voters, reveals cellular-only consumers receive far less polling solicitations than those with traditional landline service. In fact, only 10 percent of cell phone-only likely voters reported receiving at least one polling solicitation for a local, state or national election in the last 60 days. This compares to nearly 30 percent of consumers who also have, or rely exclusively on, traditional landline service.

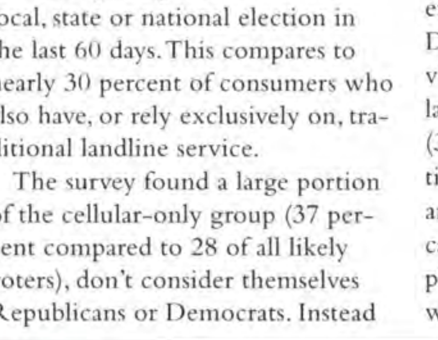
The survey found a large portion of the cellular-only group (37 percent compared to 28 of all likely voters), don't consider themselves Republicans or Democrats. Instead they're more likely to be Independents or have no political affiliation at all. The cellular-only group is also much younger by nearly half compared to all other consumers, more likely to be single, employed part-time or not at all (mostly students) and have lower average incomes.

Another factor thwarting the effectiveness of political pollsters is the practice of call screening.

The survey found while likely voters, both Republican and Democrat, reported receiving an equal number of polling calls, Republicans are 25 percent more likely than Democrats to have responded to at least one poll. The difference was just as pronounced for polls related to the national election, where Republicans were more than 23 percent more likely to have responded to a poll call.

Some of the difference may be attributed to the survey findings showing that Democrats are much more likely than Republicans to indicate they screen their calls (44 percent and 27 percent respectively).

The survey also uncovered another factor working against pollsters. Democrats with cellular phone services who also have a traditional landline are 46 percent more likely (35 percent and 24 percent respectively) than Republicans to say they answer "most" of their incoming calls at home using their cell phones. For more information visit www.ce.org.



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## Product and Service Update

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which provides the opportunity for a business to gather market intelligence expediently, and to create an information community; Knowledge Reporter, a tracker management system designed to simplify the storage of data by storing multiple trackers in one area and in one recognizable format; and Knowledge Tree, a knowledge network capable of storing previously disparate strands of business and consumer data in an accessible and actionable format. Each of the elements can be developed for the business separately, yet can also be interlinked to ensure that business information in whatever form remains connected via one system. For more information visit www.nunwood.com.

### New Hispanic market offering from Cohorts

Denver segmentation firm Cohorts is now offering Hispanic Cohorts, a household-based segmentation product comprising 19 consumer groups within the American Hispanic community. Segments include Isabel (successful career women), who is highly acculturated into American culture and society, and Domingo y Sylvia (modest income grandparents), who still predominately speak Spanish and feel loyalty toward Spanish advertising and media.

Rather than focusing on cultural heritage (e.g., Mexican and Puerto Rican) as a means for segmenting the Hispanic community, Hispanic Cohorts is based on the theory that socioeconomic and familial circumstances drive most consumer behaviors, even more so than specific cultural heritage.

Integra Relationship Marketing and Simmons Market Research Bureau provided insight that assisted with the development of Hispanic Cohorts. Both companies will incorporate Hispanic Cohorts into their product offerings. Simmons will offer its clients Hispanic Cohorts as part of its National Hispanic Consumer Study (NHCS) license. For more information visit www.cohorts.com.

### Have no fear, the WOW! team is here

G & S Research Carmel, Ind., has established an internal team to reinforce efforts to brand company services with a feeling of "wow." Through the recognition of exceptional performance and other initiatives, the G & S Research WOW! team is challenging its organization to discover better ways to not only partner with but also "wow" client companies.

The WOW! team monitors project successes and client feedback in order to enhance the value of G & S services. By providing special-skills training, performance recognition and examples of best practices companywide, the cross-departmental WOW! team is intended to make it easy to communicate the challenges and solutions experienced by various project teams.

Project teams at G & S earn WOW!-based recognition for exceeding client expectations - by beating a deadline, developing an innovative strategy or finding other ways to go the extra mile. For more information visit www.gs-research.com.

### Sawtooth Software updates Web interviewing system

Sawtooth Software, Sequim, Wash., has released of SSI Web v5, an upgrade offering improvements to Sawtooth Software's general Web interviewing system. In addition to the standard question types (checkbox, radio, numeric, open-end, grid), SSI Web can also build customized (constructed) lists of brands or other response options chosen in previous questions. These customized lists can be used in later questions. Skip patterns are much more flexible in v5, including "pre" and "post" skip options. SSI Web supports randomization of questions on a page, or a series of pages. Power users can add their own custom HTML questions, JavaScript, or even instructions written in Perl.

SSI Web lets users host their own surveys (Unix or Windows servers), or Sawtooth Software can host them for a fee. An option for CAPI-based interviewing is also included. The software is sold for a

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one-time purchase price, rather than an annual or per-survey fee. For more information visit www.sawtoothsoftware.com.

## New facilities

Q Research Solutions, Old Bridge, N.J., has opened a new test kitchen. The 1,597-square-foot facility is located two miles from the firm's headquarters, in the Cambridge Square shopping center. It seats 25 respondents per session and is equipped to conduct testing under both consumer kitchen or restaurant equipment scenarios.

## Briefly

New York-research firm The Ziment Group has launched IMAP Research, a new division that will specialize in conducting multi-client studies for the pharmaceutical and health care industries.

Saskatoon-based Interactive Tracking Systems Inc. (Itracks) has released the latest version of its Bulletin Board Focus Groups. Improved management tools like the enhanced communication and transcript features are designed to help moderators create and edit their guides, participant lists and e-mail invitations more easily. With multiple setting options, moderators can adapt the technology to suit their needs. For more information visit www.itracks.com.

BMRB and Millward Brown have joined forces in the U.K. to launch Enlightenment, a new service that offers clients consumer intelligence drawn from BMRB's marketing information services, including TGI, and where relevant, Millward Brown's client-specific primary research. For more information visit www.enlightenment-uk.com.

Harris Interactive, Rochester, N.Y., has introduced Trust-Based Commitment, a measure that allows marketers to understand customers' multidimensional commitment based on personal and functional connection. This research model helps explain how customers interact with outside environmental forces, such as competitive action, pricing, product channel availability and even changing consumer goals. For more information visit www.harrisinteractive.com.

Atlanta research firm Brain Surgery Worldwide is now offering "emotion drivers" as a standalone product called Connection Drivers. Brain Surgery has uncovered that, for every brand, product or service, there are four or five primary emotional drivers that will motivate purchase behavior. These emotion drivers exist for all types of customer groups from credit card customers, physicians, patients, long distance telephone users, wireless phone customers or any number of branded consumer product groups. For more information visit www.brainsurgeryinc.com.

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## Research Industry News

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technique - claimed ad awareness - with a new approach that deduced effectiveness from recognition. Their findings revealed that claimed advertising awareness seriously underestimates the effectiveness of advertising.

The winners of the other MRS Research Effectiveness Awards were:

MRS Applications of Research Award: Simpson Carpenter.

MRS Public Policy/Social Research Effectiveness Award: TNS UK & the Scottish Executive.

MRS/ASC Award for Technology Effectiveness: E-Tabs International.

MRS/AURA Insight Management Effectiveness Award: Nunwood Consulting.

Two MRS Gold Medals for outstanding service to the research industry were also presented to Stephan Buck and James Rothman for a combined total of 67 years editorship of the *International Journal of Market Research*. For more information visit www.mrs.org.uk.

### Awards/rankings

**Perseus Development Corporation**, a Braintree, Mass., research firm, has been named to *Inc.* magazine's annual Inc. 500 ranking of the fastest-growing private companies in the country. In addition, Perseus has been named to the 2004 Deloitte Technology Fast 500 as one of the fastest-growing technology companies in North America, and to *Software Magazine*'s Annual Software 500, as one of the world's largest software companies. Perseus ranked #356 on both the Inc. 500 and Fast 500.

Saskatoon-based research firm **Itracks** received the Business Development Bank of Canada's (BDC) Ongoing Achievement Award. The award comes with a $20,000 grant offered by Hewlett-Packard and a BDC Growth Potential Assessment valued at $5,000 intended to help the company achieve its growth objectives. The award recognizes former winners of the BDC Young Entrepreneur Awards for steady business growth and outstanding achievement. Dan and Garnette Weber, Itracks' founders and owners, won the BDC Young Entrepreneur Award in 1999.

**Walker Information**, Indianapolis, has won the gold award for technology in the Indiana Excellence Awards for its development of The Walker SmartLoyalty System, an Internet-based CLM tool. The annual Indiana Excellence Awards are sponsored by BKD and *Indiana Business Magazine*. The awards program recognizes business excellence through the improvement of specific business processes.

Seattle research firm **NetReflector, Inc**. has ranked number 303 for its 661 percent growth from 1999 to 2003 on Deloitte's 2004 Technology Fast 500. The Technology Fast 500 is a ranking of the 500 fastest-growing technology companies in North America based on average percentage revenue growth over five years. Last year, NetReflector ranked Number 275 on that same listing.

**WebSurveyor Corporation**, Herndon, Va., has been named to *Inc.* magazine's annual Inc. 500 ranking of the fastest-growing private companies in the country. WebSurveyor ranks #59 on the list. WebSurveyor boasted average annual sales growth of 430 percent, compared to sales growth of 265 percent for all companies included in the list.

### New accounts/projects

Maple Grove, Minn.-based **Data Recognition Corporation** has been awarded a five-year, $20 million IDIQ (indefinite delivery indefinite quantity) contract with Defense Manpower Data Center (DMDC). DMDC, a branch of the United States Department of Defense (DoD), is responsible for administering surveys that assess attitudes and opinions on a wide range of personnel issues across the entire DoD community: active duty members, reserve component members, civilian employees, veterans, and family members.

Farmington Hills, Mich.-based research firm **MORPACE International, Inc**., announced the award of its Management, Organizational and Business Improvement Services (MOBIS) schedule from the General Services Administration. The schedule, contract number GS-10F-0618P, will enable MORPACE to provide consulting, facilitation and survey services as a prime contractor to federal agencies.

**20/20 Research, Inc.,** Nashville, has added market research firms Verus Group, Evergreen, Colo., and Bunofsky Research Group, Staten Island, N.Y., to its list of online Qualboard software subscribers.

The Joint Industry Committee for Audience Research in Belgium, CIM, awarded the contract for ongoing radio research in Belgium for the years 2005-2006 to Germany-based **GfK**. In addition to the conventional data consumption collection method using interviews, GfK will also measure radio consumption electronically, using the new MediaWatch technology.

New York-based media firm **GroupM** and **Simmons** announced the expansion of a comprehensive multi-year agreement under which media agencies

MindShare and Mediaedge:cia will use Simmons research data, including the Simmons National and Hispanic Consumer Survey as well as the Teens and Kids studies.

**Perseus Development Corporation**, Braintree, Mass., announced that The U.S. Naval Personnel Development Command (NPDC), the U.S. Coast Guard, and Sandia National Laboratories are implementing Perseus SurveySolutions/EFM (enterprise feedback management) to enhance training practices across the country.

**Millward Brown Poland** has won a tender to conduct radio audience research in Poland. The contract involves interviewing 92,000 respondents annually, and the main study will be supported by a biannual diary panel. Proprietary software will be used to present data to radio stations, advertising agencies and media companies, and will enable clients to carry out reach and frequency analysis.

The Maine Office of Tourism has selected **Davidson-Peterson Associates**, a Kennebunk, Maine, research firm, to manage the state's first Internet research program for its tourism site, www.visitmaine.com.

Beiersdorf, Inc. has renewed its contract with **ACNielsen U.S.**, Schaumburg, Ill., and will retain ACNielsen as its preferred provider of syndicated sales information and consumer insights. Beiersdorf is a manufacturer of skin care and health care products, including brands such as Nivea, Eucerin, Aquaphor, Curad, Futoro and Basis.

## New companies/new divisions/relocations/expansions

**Manhattan-on-Rouge Communications, LLC** has opened for business, offering opinion and market research, public relations, and marketing communication services. Contact Rob Hilliard, principal, at P.O. Box 291, Clarkston, Mich., 48347-9932. Phone 248-320-1846. Web www.manhattan-on-rougecommunications.com.

## Company earnings reports

At Rochester, N.Y.-based **Harris Interactive**, revenue for its fiscal first quarter 2005 was $40.7 million, up 22 percent from the same period a year ago. Internet revenue for the quarter was $24.2 million, up 35 percent over last year. For the fiscal first quarter, Internet revenue comprised 59 percent of all revenue and 73 percent of U.S. revenue. Organic revenue (excluding $2.6 million of WirthlinWorldwide and $1 million of Novatris revenue) was $37.1 million, up 11 percent versus $33.3 million in revenue for the same period last year. Organic Internet revenue (excluding $1 million from Novatris and $0.2 million from WirthlinWorldwide) was up 29 percent from the $17.9 million of Internet revenue reported a year ago. For the quarter, organic Internet revenue increased to 62 percent of the total organic revenue while traditional organic revenue contracted nine percentage points from a year ago.

Total operating income for the quarter rose 34 percent to $2.6 million, or 6.4 percent of revenue, compared to operating income of $1.9 million, or 5.8 percent of revenue reported in Q1 fiscal 2004. Net income for the quarter was $1.7 million, or $0.03 per share, up 35 percent from the $1.3 million, or $0.02 per share of net income reported in Q1 of fiscal 2004.

HI Europe revenue was $9.8 million, up 52 percent from the same period a year ago. European

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Internet revenue, now more than 25 percent of the total revenue, was $2.5 million (including $0.9 million from Novatris), up substantially from the $0.3 million of Internet revenue reported last year. Organic European revenue (excluding $1.0 million each from both WirthlinWorldwide and Novatris) was $7.7 million, up 20 percent versus $6.4 million in revenue for the same period last year.

For the third quarter 2004, **Arbitron Inc.**, New York, reported revenue of $82.0 million, an increase of 8.8 percent over revenue of $75.3 million during the third quarter of 2003. Costs and expenses for the third quarter increased by 7.0 percent, from $44.1 million in 2003 to $47.1 million in 2004. Earnings before interest and taxes (EBIT) for the quarter were $33.7 million, compared with EBIT of $30.6 million during the comparable period last year.

Interest expense for the third quarter declined 36.7 percent, from $2.9 million in 2003 to $1.8 million in 2004, due to reductions in debt between the two periods.

Income tax expense was lower in the third quarter primarily because reserves for tax contingencies were reversed during the quarter due to guidance in a recent IRS notice. Also, the valuation allowance on deferred tax assets related to state net operating loss carryforwards was reduced due to higher actual and projected taxable income in the applicable states. The net benefit of these changes during the quarter was $4.2 million. Finally, the effective tax rate for 2004, exclusive of these discrete events, has been reduced from 39.0 percent to 38.5 percent to reflect a reduction in the expected state tax rate.

Net income for the quarter, which includes the $4.2 million impact of the tax adjustments, was $24.2 million, compared with $17.0 million for the third quarter of 2003 and net income per share for the third quarter 2004 increased to $0.77 (diluted), compared with $0.55 (diluted) during the comparable period last year.

In the third quarter 2004, Arbitron paid the final $25 million outstanding on its revolving credit facility and reduced its long-term debt to $50 million.

For the nine months ended September 30, 2004, revenue was $223.6 million, an increase of 7.5 percent over the same period last year. EBIT was $81.5 million, compared to $76.6 million in 2003. Net income for the nine months was $50.9 million or $1.62 per share (diluted), compared with $41.1 million or $1.35 per share (diluted) during the comparable period last year.

**Greenfield Online, Inc.**, Wilton, Conn., reported net revenue for the third quarter ended September 30, 2004 of $12.0 million, a 70 percent increase compared to $7.0 million for the third quarter ended September 30, 2003. Revenue for the nine months ended September 30, 2004 was $30.9 million, a 76 percent increase compared to $17.6 million for the nine months ended September 30, 2003.

Gross profit for the third quarter ended September 30, 2004 was $9.5 million, or 79 percent of revenue, and increased 112 percent compared to $4.5 million, or 63 percent of revenue, in the same period a year ago. Gross profit for the nine months ended September 30, 2004 was $23.4 million, or 76 percent of revenue, and increased 103 percent compared to $11.5 million, or 66 percent of revenue in the same period a year ago.

Adjusted EBITDA, a non-GAAP financial measure, for the third quarter ended September 30, 2004 increased 176 percent to $3.0 million compared to $1.1 million in the same period a year ago. Adjusted EBITDA for the nine months ended September 30, 2004 increased 136 percent to $6.9 million compared to $2.9 million for the same period a year ago.

Operating income for the third quarter ended September 30, 2004 increased to $2.3 million from $480,000 in the same period a year ago. Operating income for the nine months ended September 30, 2004 increased to $4.7 million from $1.1 million for the same period a year ago.

Net income for the third quarter of 2004 increased to $1.2 million compared to $335,000 for the third quarter of 2003. Net income for the nine months ended September 30, 2004 increased to $3.3 million compared to $1.2 million in the same period a year ago. The third quarter of 2004 includes a non-recurring, non-operating write-off of approximately $1.0 million to related-party interest expense of a debt discount on Series C-2 Preferred Stock redeemed in connection with the company's initial public offering.

Sales bookings in the third quarter, defined as new signed contracts for online survey work, reached $12.5 million, up 87 percent over the same period a year ago and up 3 percent from the second quarter. Bid volume, defined as the total value of online survey projects submitted for bid by clients, during the three months ended September 30, 2004 was $77 million, up 107 percent over the same period a year ago and up 16 percent from the second quarter. Fourth-quarter backlog, defined as signed contracts for online survey projects to be completed and delivered to clients during the three months ending December 31, 2004, is approximately $10 million as of November 3, 2004.

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## Names of Note

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Bartlesville, Okla.-based research firm *On-Line Communications* has named **Jeff Forgey** director finance and promoted **Christy Ruegamer** to project manager.

**Merrill Dubrow** has been named president and CEO of *M/A/R/C Research*, Dallas.

*Sigma: Research Management Group*, Cincinnati has named **Ward Lamphere** senior research executive.

North Chelmsford, Mass., publishing firm *Courier Corporation* has added **Susan L. Wagner**, vice president of marketing research for the Gillette Company, to its board of directors.

**Loula Zaklama**, president and CEO of Egypt-based *Rada Research and Public Relations*, has received the Special Achievement Award from the American Chamber of Commerce in Egypt.

New York research firm *Ziment* has named **Andrew Scott** as managing director of Ziment Europe. In addition, **Andrea Manemann** has been named manager of client service for Ziment, based in Stuttgart.

*Avon Products, Inc.*, New York, has named **Elizabeth A. Smith** executive vice president and brand president, effective January 1, 2005. Marketing research will be among her new responsibilities.

*DoubleClick Inc.*, New York, has named **Keith Jones** as managing director of its Abacus Europe unit.

*Synovate* has appointed **Miranda Cheung** managing director of the Singapore office.

**Sue Wheeler** has joined as general manager of the business-to-business (B2B) department and **Reza Chady** has been named general manager of the technology department in the newly formed custom research division of U.K-based *GfK Martin Hamblin*. Both have also been appointed to the GfK Martin Hamblin board.

*META Group, Inc.*, Stamford, Conn., announced that **Monte Ford** has resigned as a member of the firm's board of directors to focus his time and energy on his work at American Airlines.

Paris-based Ipsos Group has named **Pierre Le Mahn** as chairman and CEO of *Ipsos Europe*. This appointment follows **Jean-Michel Carlo**'s decision to leave Ipsos and to resume his career in the communication industry.

Evanston, Ill.-based *Solucient* has named **Charlene Bonvissuto** as senior vice president, customer service.

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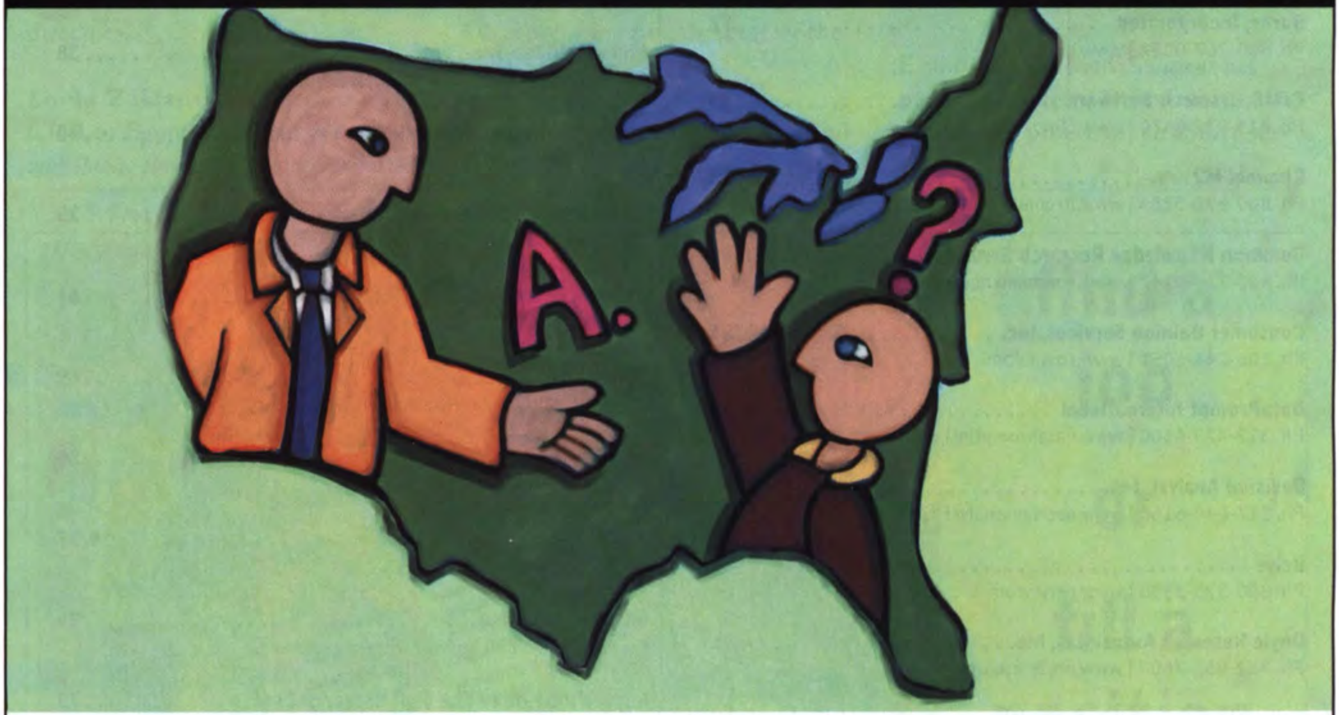

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## Trade Talk

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quite difficult, but the online approach allows them to participate at their convenience and has netted GM good information and goodwill - Burcz said the disabled drivers were bursting to share information and are very happy that an automaker has taken the time to listen.

Other highlights:

• As part of its wide-ranging use of research, Yahoo! asked a group of self-confessed Web addicts to endure an extended period of Internet deprivation. Michelle Madansky, vice president of corporate and sales research at Yahoo!, showed some hilarious snippets from the video diaries each of the subjects kept. As the Web-less days stretched on and on they became more and more anxious. One poor soul even confessed he was looking forward to spam!

• Fred John of MasterCard delivered a thought-provoking look at what's wrong with the research buyer/provider relationship. Not surprisingly, one of the chief causes of difficulty is money. On the client side, research departments feel pressure to keep costs down from the people who pay the bills for their expenditures. The check-writers view research as a commodity and constantly push for the lowest possible price, John said.

On the provider side, following their M&A binges, the larger, acquisitive firms are laden with debt and new costs as they work to digest the smaller companies they have consumed. With a mandate to cut costs and boost sales, their senior-level people are pressured to spend more of their time selling rather than doing research. Thus they end up handing work off to junior employees, who, though well-meaning, clearly aren't as skilled as their bosses. (John's mention of the junior researchers' "cheerful incompetence" drew a smattering of knowing laughs from the audience.)

What's the way out of this death spiral? Researchers on both sides, whom John likened to Romeo and Juliet going against the wishes of their warring families, must forge a partnership (a term he acknowledged is overused), using wide-open communication and a "we're in this together" approach to maximize and demonstrate efficiencies, with the goal of helping each other ward off the damaging influences of their respective comptrollers.

• As vital and substantive as many of the presentations were, they paled next to Richard Burkholder's Thursday luncheon speech. Burkholder, international bureau chief of the Gallup Poll, took a rapt audience through the process of fielding the 2003 Gallup Poll of Baghdad. He outlined the hard work, the risks and the cross-cultural cooperation that was necessary to field a statistically valid study in a war-torn city.

At times, in the throes of a stressful work day, the outcomes of the business decisions we all struggle with appear to reach life-or-death status. Hearing about a nation facing true danger and mortality on a daily basis was a sobering dose of perspective. | Q

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by Joseph Rydholm, Quirk's Editor

# It was an eventful Event

The streets of San Francisco were certainly action-packed during my late October visit to attend the annual IIR Market Research Event. Contract squabbles had caused 14 of the larger hotels in town to lock out their service workers and as a result, the blocks around Union Square echoed with the angry call-and-response chants of workers as they paced in solidarity in front of their erstwhile places of employment.

Things were certainly calmer - and just as collegial, in a way - in the conference rooms and meeting areas in the Hotel Nikko, one of the few Union Square hotels without a labor problem and host of this year's IIR conference.

Attendance at the four-day conference was way up, appearing by my unscientific count to have almost doubled from the previous year, and enthusiasm was palpable - with good reason. Senior Conference Producer Heather Kalish and the IIR event staff assembled an impressive and wide-ranging lineup of presenters and topics, giving attendees the chance to learn from peers at firms like Microsoft, Intel, Kraft Canada, General Motors, Best Buy and PepsiCo. There was almost too much to see!

Tuesday's opening schedule featured day-long concurrent tracks on online research, ethnography, usability and segmentation. Intel's John Sherry gave a fascinating look into the kind of far-forward exploration that ethnographic research is leading at his firm. Taking a cue from C.K. Prahalad's book *The Fortune at the Bottom of the Pyramid: Eradicating Poverty Through Profits*, Sherry and others on his team have searched on a truly global scale for ways to use technology to improve the lives of workers. We're not talking about high-priced equipment here. Rather, it's seemingly mundane things like the cell phone that allows a maid in Morocco to field calls from prospective employers rather than go begging for work door-to-door, or the computer terminal in the dusty Indian village that gives citizens a direct link to distant government offices. These and other examples Sherry cited showed that there are myriad ways for small things to make a big difference.

The ethnographers at Intel have also looked at the issues of aging and infirmity, with an eye toward developing technologies that might make the lives of the aged and their caregivers easier. Obviously, the more technology expands, the more markets there are for the chips and components Intel makes, so Intel isn't doing this work as a public service. But in a world where businesses can often be extremely shortsighted in their product creation efforts, it was interesting to see the work of a firm looking far and wide to develop new markets and exciting to see that ethnographic research is playing a key role in a socially worthwhile pursuit.

Tuesday afternoon I jumped over to the online research track to hear Diane Hessan of Communispace moderate a panel of clients who have used her firm to set up online communities with targeted groups of customers. In a textbook example of how ideally suited online research can be to certain applications, Ann Burcz of General Motors talked about GM's success with its online community of drivers with disabilities. These drivers, who range from the permanently disabled to those with hip and joint problems, all face difficulties getting into and out of their vehicles and the GM Mobility unit has been exploring ways to design vehicles and features that make their driving experience easier. Gathering these respondents for conventional research might be

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