

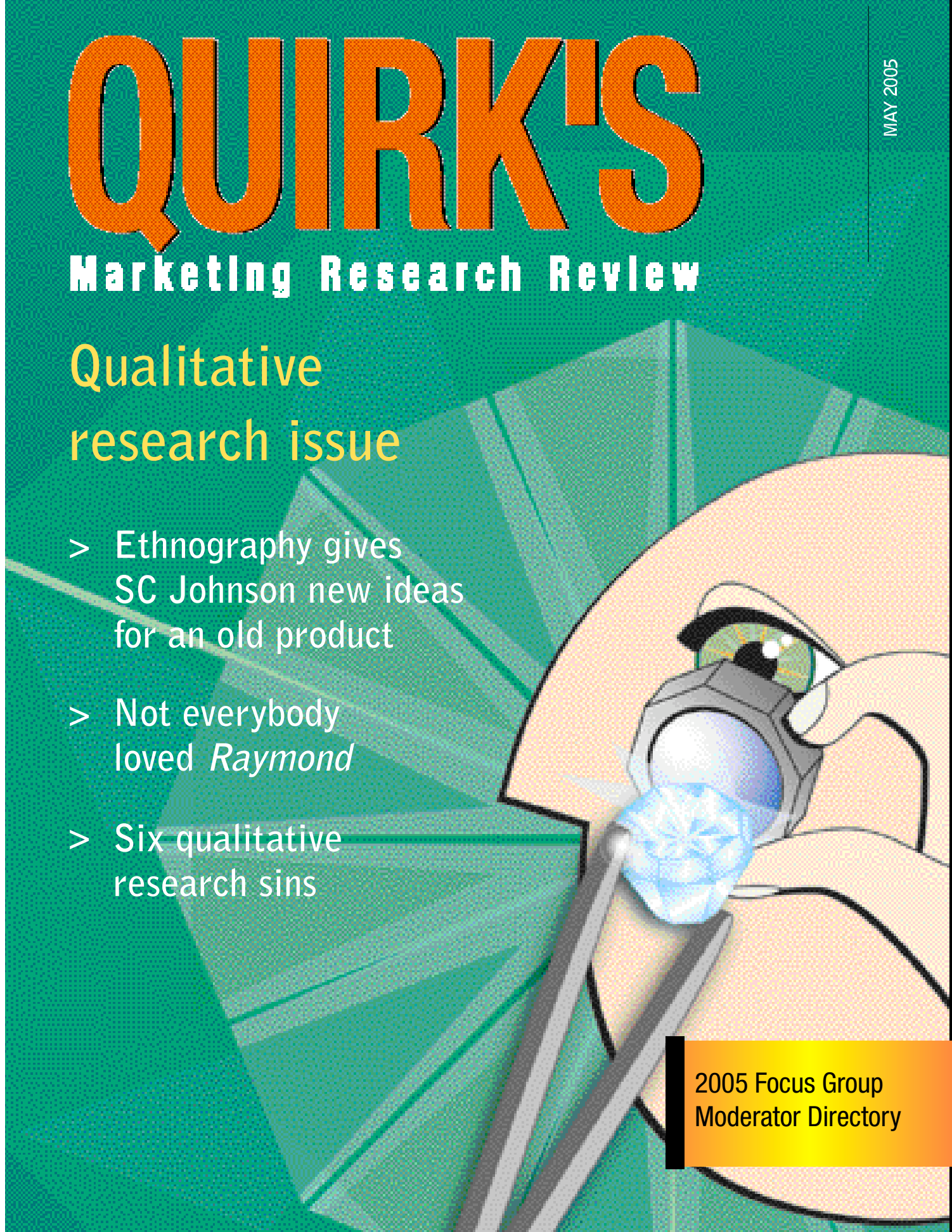
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Marketing Research Review

Qualitative research issue

- > Ethnography gives SC Johnson new ideas for an old product
- > Not everybody loved *Raymond*
- > Six qualitative research sins

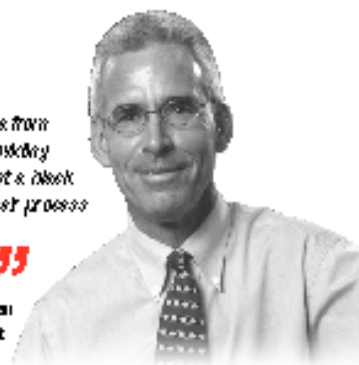
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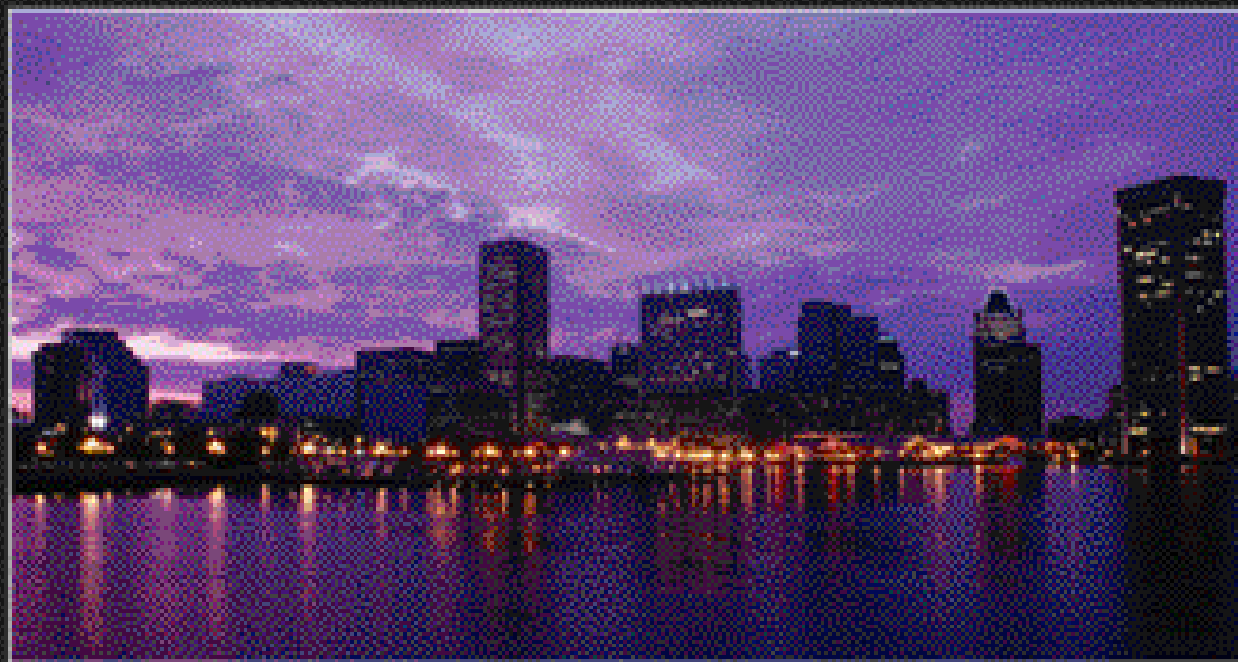
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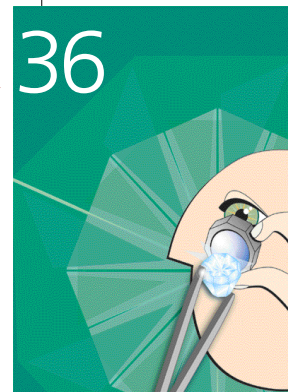


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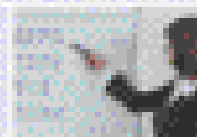


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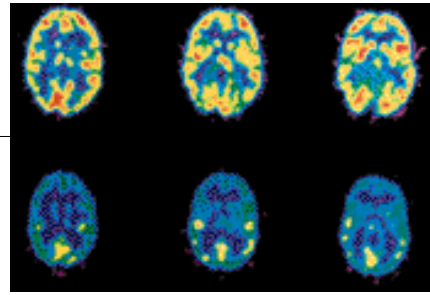
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In case you missed it...

news and notes on marketing and research



At 7-Eleven, it's oh thank heaven for technology

If you need another example of how investments in technology and a focus on the customer can reap concrete rewards, consider 7-Eleven. In a *Business 2.0* article, writer Elizabeth Esfahani showed how 7-Eleven CEO Jim Keyes has used technology and store-level empowerment to boost sales, attract new customers and wrest control over distribution and product decisions from major suppliers.



The company has also gotten into product development, using store sales data to identify trends and unmet needs. After spotting a product opportunity, it often partners with third-party manufacturers, an approach that has yielded hits like towelettes designed to remove coffee stains, and roadkill-shaped gummy candy. "We've gone from having no idea what we were selling to predicting what customers want before they even know it," said David Podeschi, 7-Eleven's senior vice president. ("7-Eleven Gets Sophisticated," *Business 2.0*, January/February 2005)

Getting inside their heads - literally

As part of a larger piece on tech trends to watch, *Fortune* magazine reported on fMRI, or functional magnetic resonance imaging, which detects the flow of blood to the brain's centers of pleasure, memory or thought. Baylor neuroscientist Read Montague's research seems to indicate that blood flow increases to certain parts of the brain's prefrontal cortex if the viewer likes what he or she is seeing. Steven Quartz of Caltech and Tim McPartlin of Lieberman Research Worldwide in Los Angeles have created an fMRI service aimed at filmmakers which will test audience reactions to film trailers. Their next plan is to offer fMRI studies on items from logos to packaged goods. ("Ten Tech Trends," *Fortune*, January 10, 2005)

Move over, blueberries

The newest super food is here: açai. Sporting as much calcium as milk, more antioxidants than blueberries and delivering a coffee-like kick, the berries taste like chocolate-covered cherries. The sole U.S. importer of the berries, San Clemente, Calif.-based Sambazon (the berries grow in the Amazon rainforest) sold \$2 million worth of bottled and frozen açai smoothies in 2004, courtesy of deals with grocers Wild Oats and Whole Foods. Can açai cereal be far behind? (Açai Berries Hit the Big Time," *Business 2.0*, January/February 2005)

Branded brands still going strong

The March issue of trendwatching.com's indispensable e-newsletter (sign up for free subscription at www.trendwatching.com) contained an extensive update on the branded brands trend. Cataloging some of the newer and more interesting examples of corporate partnerships across a wide range of products and services, the newsletter covered Philips and P&G's Intelliclean toothbrushing system, which incorporates the Sonicare toothbrush and Crest toothpaste; Apple teaming with car makers Mercedes-Benz, Volvo and Nissan; Holiday Inn and its Nickelodeon Family Suites; and Starbucks and Jim Beam launching Starbucks Coffee Liqueur. There are certainly a number of potential pitfalls behind these marriages but as the newsletter points out, this type of creative use of existing assets can lead to true wins for both sides. Many such arrangements arise from obvious synergies (is it safe to use that word again?) - a toothbrush maker and a toothpaste maker are natural partners - but others require a bit of imagination. Still, the leaps aren't all that hard to make. Think of family accommodations and Holiday Inn comes to mind. Family entertainment? Nickelodeon. Sounds like a match made in heaven, from a kid's and a marketer's perspective. Try an experiment: Take a minute to jot down your brand's core equities and values. Then think about other well-respected companies that share those attributes. Don't be afraid to cast a wide net. Find some intriguing matches? You may want to do a little research.

Tagging is it

The latest attempt to organize the Web-going experience is tagging. Using sites such as del.icio.us and www.technorati.com, Web surfers can tag any Web link they choose and then categorize and save it on a tagging site for later retrieval. It's not unlike the bookmarking process, although in this case, your bookmarks are shared with the rest of the world. At first blush, the tagging process appears cumbersome and time-consuming as users may have to wade through a mass of potentially unrelated or uninteresting links, especially if their definition of the topic at hand is different from the tag-gatherers'. Still, allowing like-minded but geographically separate groups to work together on and share the fruits of an information-gathering process does hold some appeal. A *BusinessWeek* article cited an example of bloggers interested in applying technology to non-profit groups who adopted the "NP Tech" tag and created a bibliography of more than 900 articles, Web links and blog posts. Sharing is also behind the photo Web site www.flickr.com, which was recently purchased by Yahoo! Inc. Yahoo and Google have clearly taken notice of the rise of tagging, as it has the potential to steal eyeballs from traditional search engine sites. For marketers, tagging sites have the potential to serve as labs for trend watching. Examining the ways that consumers group and categorize information could provide clues to the language and images that can be used to communicate with them. Flickr, for example, features a multitude of tagged photo sets on topics such as "summer," "wedding," "vacation" and "fun." ("Picking Up Where Search Leaves Off," *BusinessWeek*, April 11, 2005)

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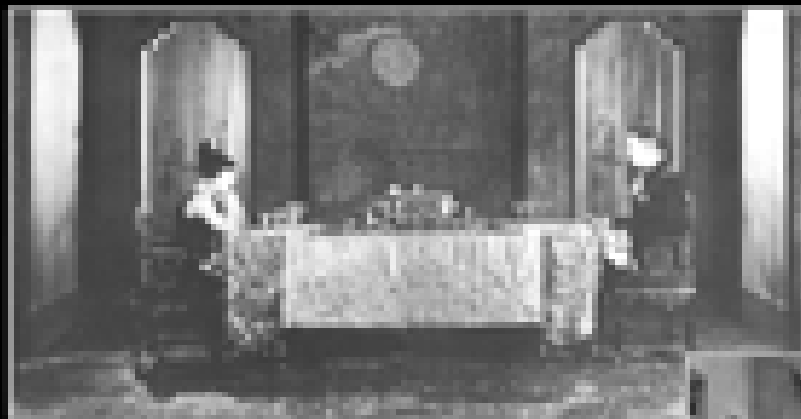
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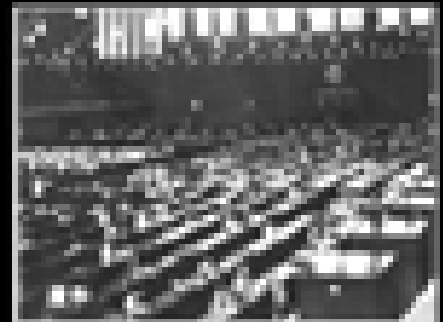
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Not everyone understands political labels

Journalists, political activists and many others routinely use political labels to describe politicians and policies as conservative or liberal, right-wing or left-wing. A Harris Poll measured what a cross-section of U.S. adults understand by these and other labels.

Most people, it appears, understand these labels in pretty much the same



way political pundits do. Large majorities believe that conservatives favor moral values, cutting taxes, and oppose same-sex marriage, gay rights, and abortion rights. Majorities believe liberals favor abortion rights, gay rights, same-sex marriages, and affirmative action. But substantial numbers of people don't know where conservatives and liberals stand on those and other issues. And some people seem to completely misunderstand these labels. These are the results of a Harris Poll of 2,209 U.S. adults surveyed online by Harris Interactive, Rochester, N.Y., between January 11 and 16, 2005.

While most people gave the expected answers, substantial minorities think

that conservatives oppose cutting taxes (19 percent) or are not sure (11 percent) whether they favor or oppose cutting taxes. In other words, 30 percent of all adults do not give the expected response that conservatives favor cutting taxes. Similarly: 50 percent believe that conservatives support gun control or are not sure; 46 percent think that conservatives support affirmative action or are not sure; 23 percent think that conservatives support abortion rights or are not sure; 19 percent think that conservatives support gay rights or are not sure; 15 percent believe conservatives support same-sex marriage or are not sure.

While large majorities believe liberals favor abortion rights, gay rights, and same-sex marriage, substantial minorities give more surprising responses. Fully 39 percent believe liberals favor cutting taxes, and 17 percent are not sure. Thirty-seven percent believe that liberals either oppose gun control (24 percent) or are not sure (13 percent).

Significant but smaller numbers do not believe or are not sure if liberals support gun control (37 percent), affirmative action (26 percent), same-sex marriage (22 percent), gay rights (17 percent), or abortion rights (16 percent).

As one would expect, many people think that right-wingers support and oppose policies in ways which are similar to the positions of conservatives. But the label right-wing is less clear to many people than conservative. More people don't know what the phrase means, with between 20 and 27 percent saying they are not sure whether a right-winger would support or oppose each of the seven policy positions.

The majorities who give the expected answers (e.g., the 59 percent who say that right-wingers support cutting taxes) are about 10 points lower than those who give the expected answers when describing conserva-

tives.

Likewise, the label left-winger is broadly perceived to be similar to liberal except that more people are not sure what it means.

Unsurprisingly, perceptions of moderates and independents fall between those of conservatives and liberals and between right- and left-wingers. But there are some interesting, possibly surprising findings. Moderates for example are seen by many people to resemble conservatives in supporting moral values and tax cuts but to resemble liberals in supporting abortion rights, gun control and gay rights. Smaller numbers, but still pluralities, believe that independents favor tax cuts, abortion rights, affirmative action, gay rights, gun control and same sex marriage. Overall, therefore, people are more likely to see moderates and independents as resembling liberals than resembling conservatives. For more information visit www.harrisinteractive.com.

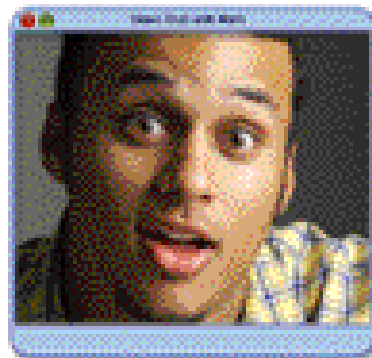
Internet users earning \$150k grow 20 percent year-over-year

New York-based Nielsen//Net-Ratings reports that Internet users with household incomes of more than \$150,000 jumped 20 percent year-over-year to 10.3 million in January 2005, leading all income groups. This group not only spends the most amount of time online (76 hours per month) as compared to the other income segment, but it consumes more Web pages (2,126 pages) than any other group.

"The rise in the number of high-income Web surfers, combined with their propensity to spend the most amount of time surfing and consuming Web pages as compared to everyone else, represents a solid opportunity for marketers," says Heather Dougherty, senior retail analyst,

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names of note

Chicago-based *Information Resources, Inc.*, has named **Robert Blattberg** chief analytics officer.

U.K.-based research firm *ESA* has named **Ana Carolina** systems developer.

Veronica Newman has joined Indianapolis research firm *Market Voice Consulting* as quantitative program manager.



Newman

Salter

Jim Salter has joined the Cherry Hill, N.J., office of *Abt Associates Business Research and Consulting Group* as principal consultant.

Cincinnati research firm *Blue Bear* has named **Wendy Kincaid** sales administration manager.

Decipher, Inc., Fresno, Calif., has named **Jens Schlueter** national sales director.

M/A/R/C Research, Irving, Texas, has announced a number of staff additions. **Frank Wyman** has been named director - advanced analytics; **Kristy Hoover** has been named marketing

assistant; and **Jeremy Brandt, Cardiss Johnson** and **Robert Lavarn** have joined the firm as data analyst interns.

Structure Tec, a Kalamazoo, Mich.-based building consulting firm, has named **Matthew Polick** marketing research and sales representative.

Lewis Oberlander has been promoted to senior vice president, domestic marketing research, *Wamer Bros. Pictures*, Burbank, Calif.

William Vidrine has joined *Bellomy Research, Inc.*, Winston-Salem, N.C., as a CATI programmer. In addition **Kimberly Cameron** has been promoted to senior research manager and



Cameron

Dube

Lynn Dube has been promoted to vice president - client service.

New York research firm *Ipsos* has named **Maria Philips** to its advertising research division in Parsippany, N.J., as vice president of tracking and equity.

Burt Leiman has been appointed managing director of *Greenfield*

Consulting Group, Westport, Conn.

Keith Peterson has been named chief operating officer of San Diego marketing information firm *Claritas* and president of *Integras*, a division of *Claritas, Inc.*



Peterson

Nader

Orem, Utah-based research firm *PGM, Inc.*, has named **Michael Nader** client development representative.

ResearchInternational has announced a number of appointments: **Miriam Rustam** as general manager to lead the agency's office in Indonesia; **Sunando Das** as regional director, consumer understanding and branding in Asia-Pacific; **Gillem Lawson** to regional director of innovation in Asia-Pacific; **Catherine Connolly** to group human resources director and member of the group board; **Douwe Rademaker** to CEO of *Research International Japan*; **Guy de Seveaux** to CEO in the Netherlands; **Alissa Algarin** to client service director/ tracking division in the Stamford, Conn., office; **Tom McCay** to technical director - tracking role. In addition, **Rosalynn Tang** has been promoted to deputy managing director of Singapore.

Foundation Energy Sales, Inc., Linthicum Heights, Md., has named **Betsy S. Vaninetti** director, market research.

Stephen Anspach, chief technology officer of Encino, Calif., research firm *E-Poll*, has added the title of senior vice president operations to his responsibilities. In addition, **MaryAnn Farrell** has

continued on page 94

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product and service update

Update of Microtab now available

Atlanta-based research software firm Microtab Inc., has released Microtab XP 2005, an update of its crosstab software. Enhancements include a new charting add-on module for the Professional Edition which helps users create pie charts, bar charts and column charts. All the charts can be either two- or three-dimensional and pie charts can be displayed in an exploded format. Charts can present either frequencies or percentages. The module allows for one-click batch creation of charts. The charts can be saved to Word and/or copied and pasted to a PowerPoint presentation. This optional module complements the SPSS Add-on Module released in 2003. The Standard and Professional Editions of Microtab XP allow unlimited questionnaire length and unlimited table length on as many as 10 million surveys. The Professional Edition also includes sample balancing, statistical testing and data manipulation features. Both of the Windows-based Standard and Professional Editions come with 24/7 free support, online searchable help and reference and tutorial documentation. For more information visit www.microtab.com.

Create presentations from tab data

New from Ontario-based data processing firm ATP Canada is Rosetta

Studio, a tool that automates the creation of customized PowerPoint or Excel presentations from tabulated data. Rosetta Studio accepts tabulated input from Quantum, CfMC Mentor, WinCross and E-Tabs packages. It lets users: save charts/tables as templates; export multiple charts/tables at the same time; create new presentations or customized tables from wave/tracking study data; duplicate any table or chart at any time; share chart or table templates over the network; globally edit stub text; and put a password on tables in the output. For more information visit www.atpcan.com.

SurveyGold 7.0 debuts

Golden Hills Software, Inc., Colorado Springs, Colo., has released SurveyGold version 7.0 Standard Edition, an upgrade to its Windows-based survey software package. Surveys can be conducted online, on paper or over the phone. Surveys authored with SurveyGold Pro can be exported and subsequently imported by any other SurveyGold user, allowing surveys to be authored centrally and distributed remotely. SurveyGold Pro surveys are distributable to any other SurveyGold 7.0 Pro or Standard user in the world. Survey results collected by SurveyGold Pro users can be exported and shared with other Pro users, allowing results from remotely-conducted surveys to be centrally gathered for reporting and

analysis purposes.

Other new 7.0 features include a compact user interface with a spellchecker that supports 12 languages, support for ranking questions, and improved Web survey form and confirmation style consistency.

SurveyGold also provides custom Web formatting of colors and fonts, Web survey responses submitted using the secure sockets layer (SSL) Internet security protocol, and enhancements when filtering survey results. Additionally, this version allows users to publish Web results in a browser, provides enhanced filtering of results, and has improved processing of Web survey responses. For more information visit www.surveygold.com.

Services provide POS data on purchases by Hispanic, African-American consumers

VNU Marketing Information is now offering two new services, Target Track and Homescan African-American Consumer Panel. Target Track, a joint offering of ACNielsen U.S. and Spectra, analyzes point-of-sale data from food, drug and mass merchandise stores to quantify sales among Hispanic and African-American consumers, highlighting those categories and brands that skew toward each segment. In addition to performance tracking, the service also analyzes promotional effectiveness within each segment. Target Track offers reporting across the total U.S., as well as within 20 census-based retailer trade areas, 13 African-American markets, and 11 Hispanic markets.

The ACNielsen Homescan African-American Consumer Panel provides integrated shopping and attitudinal insights into African-American consumers so that marketers can understand their product preferences. The panel consists of a nationally-representative sample of African-American

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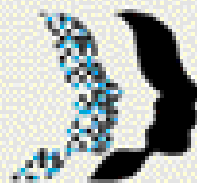
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research industry news

News notes

In response to the loss of Heinrich A. Litzenroth, who went missing following the December 2004 tsunami in Southeast Asia, Germany-based **GfK Group** has restructured its management board responsibilities. The aim of this restructuring is to create a team of five directors. In accordance with the resolutions passed by the supervisory board and the HR committee, the business operations of GfK, which had previously been organized in five business divisions, will in future be allocated to three areas of responsibility: custom research; retail and technology; consumer tracking/media.

For reasons of legal formality, it was necessary to withdraw the manage-

ment board appointment of Litzenroth, who was the management board member with responsibility for the custom research business division. Litzenroth began his career with GfK in 1978. He was a co-initiator of the development of BehaviorScan test markets in Germany and France and he worked to expand the services of test market research. He was appointed managing director of GfK Marktforschung in 1993 and since 2000 had served as the board member for the custom research division.

With the loss of Litzenroth in mind, the management, employees and business associates of GfK donated a total of EUR 300,000 in his memory to be used for an aid project to rebuild the

tsunami-torn region.

ACNielsen, New York, has joined the University of Arkansas' new RFID Research Center to study the impact of radio-frequency identification (RFID) technology on the global consumer packaged goods (CPG) industry. The center, at the university's Sam M. Walton College of Business, is examining how best to utilize RFID technology in the CPG industry, with a special focus on helping retailers and manufacture maximize their return on RFID investment.

Invoke Solutions, a Wellesley, Mass., research firm, announced a \$6.5 million investment from Bain Capital Ventures and BEV Capital. William (Bill) Meurer, a partner with BEV Capital, has joined the Invoke Solutions board of directors.

Cincinnati-based **AcuPOLL Research Inc.**, has restructured its operations in Europe, closing AcuPOLL Europe Ltd., which operated as a standalone full-service agency. AcuPOLL's core services of concept screening and volumetrics are now offered via a division of AcuPOLL Research Inc.

Research firm **TNS** has reorganized its core custom business around four new areas of expertise: new product development, motivational research, brand and advertising research, and stakeholder management. In conjunction, TNS has appointed global leaders in each of the new areas. The brand and advertising research area will be jointly headed by Trevor Richards, based in the U.K., and Larry Friedman, based in the U.S., together with Jannie Hofmeyr. Joachim Scharioth will lead the stakeholder management area. Paer Kaelleskog and Andrea Wilson will head up the motivational research division together with Roz Calder and Michael Cook.

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Calendar of Events May-September

The American Association of Public Opinion Research will hold its annual conference on May 12-15 at the Fontainebleau Hilton Resort, Miami. For more information visit www.aapor.org.

ESOMAR will hold a conference on the fragrance industry on May 15-17 in New York City. For more information visit www.esomar.org/fragrance2005.

ESOMAR will hold its Global Cross-industry Forum 2 (The Client Focus) on May 17-19 in New York. For more information visit www.esomar.org/globalforum2005.

The Business & Industrial Group will hold its annual business-to-business research conference on May 11-13 at the St. Pierre Marriott, Chesham, England. For more information visit www.bigconference.org.

The Marketing Research Association will hold its annual conference in Chicago on June 1-3 at the Marriott Chicago Downtown. For more information visit www.mra-net.org.

The American Marketing Association will hold its annual Advanced Research Techniques forum on June 12-15 at the Coeur d'Alene Resort, Coeur d'Alene, Idaho. For more information visit www.marketingpower.com.

ESOMAR and the Advertising Research Foundation are co-sponsoring the Worldwide Audience Measurement conference (online, outdoors/out-of-home, print, media mix, radio, TV) on June 19-24 in Montreal. For more information visit www.esomar.org/wam2005.

Canada's Professional Marketing Research Society will hold its annual conference and trade fair on June 19-21 in Halifax, Nova Scotia. For more information visit www.pmrs-aprm.com.

The Travel and Tourism Research Association will hold its annual conference, themed "The 3 R's: Research, Results and Rewards," on June 12-15 at the New Orleans Marriott. For more information visit www.ttra.com.

ESOMAR will hold its annual congress on September 18-21 in Cannes, France. For more information visit www.esomar.org/congress2005.

The American Marketing Association will hold its annual marketing research conference on September 25-28 at the Marriott Copley Place in Boston. For more information visit www.marketingpower.com.

The Council of American Survey Research Organizations will hold its annual members-only conference on September 28-30 at the Four Seasons Hotel, Toronto. For more information visit www.casro.org.



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Thoughts on Gladwell's *Blink*

Malcolm Gladwell's *Blink* is at the top of non-fiction and business book lists. Gladwell is an enormously interesting and entertaining writer, and has attained guru status with *Blink* and his prior book *The Tipping Point*. He is a staff writer for *The New Yorker*, and was formerly a business and science reporter at *The Washington Post*.

The subject of *Blink* is "the power of thinking without thinking." It tells how choices and insights that seem to be snap judgments - made in the blink of an eye - are not as simple as they seem. These choices explain why some people are brilliant decision-makers with highly developed intuition and instincts while others are inept even after long study of a subject. Often the best decisions and insights are those that can not be explained easily to others. He describes the art of "thin-slicing," which allows filtering out the few factors that really matter from an overwhelming number of variables. As you can imagine, Gladwell has

become the darling of the advertising and creative community. The headline for a January 24, 2005 *Advertising Age* article trumpeted, "Tipping Point guru takes on focus groups." The article continued by thumping "market research that fails to ratify anything but the status quo" and Gladwell himself said that he hoped the book would help "creatives to protect their work from the numbing effect of market research." And there is more, such as this quote from Ben & Jerry's researcher Lucas Jensen: "The unique insights that drive innovation and really great ad campaigns aren't gained through traditional research like mall intercepts, mail surveys and focus groups."

No wonder ad agencies like Omnicom Group's DDB are hiring Gladwell to speak to small groups of their clients: He defies the insight and process of ad agency creatives.

However, the principles espoused in *Blink* can be interpreted to provide underpinnings and rationale

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for why talented moderators and the qualitative research process are so effective in delivering exactly the insights marketers and advertisers seek.

The book itself is a fast and entertaining read. Business examples make it particularly relevant for market researchers, marketers and product designers. New insight is offered about the New Coke fiasco which required Coca-Cola to return to Classic Coke. In a chapter about "the chair of death" it is shown that early tests were negative for a Herman Miller chair design that became the company's best seller ever. Work in package research by Cheskin Research demonstrates how "sensation transference" is key to effective packaging design. And experienced programming executives at CBS overrode poor quantitative show testing

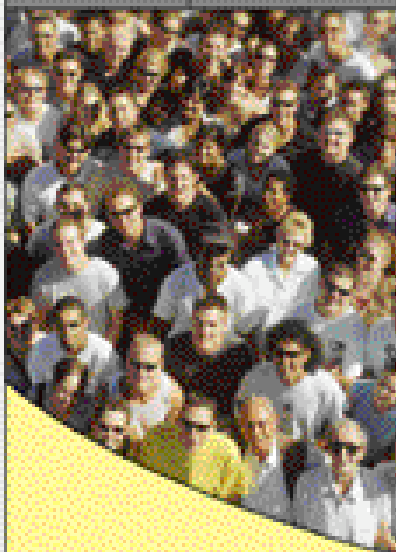
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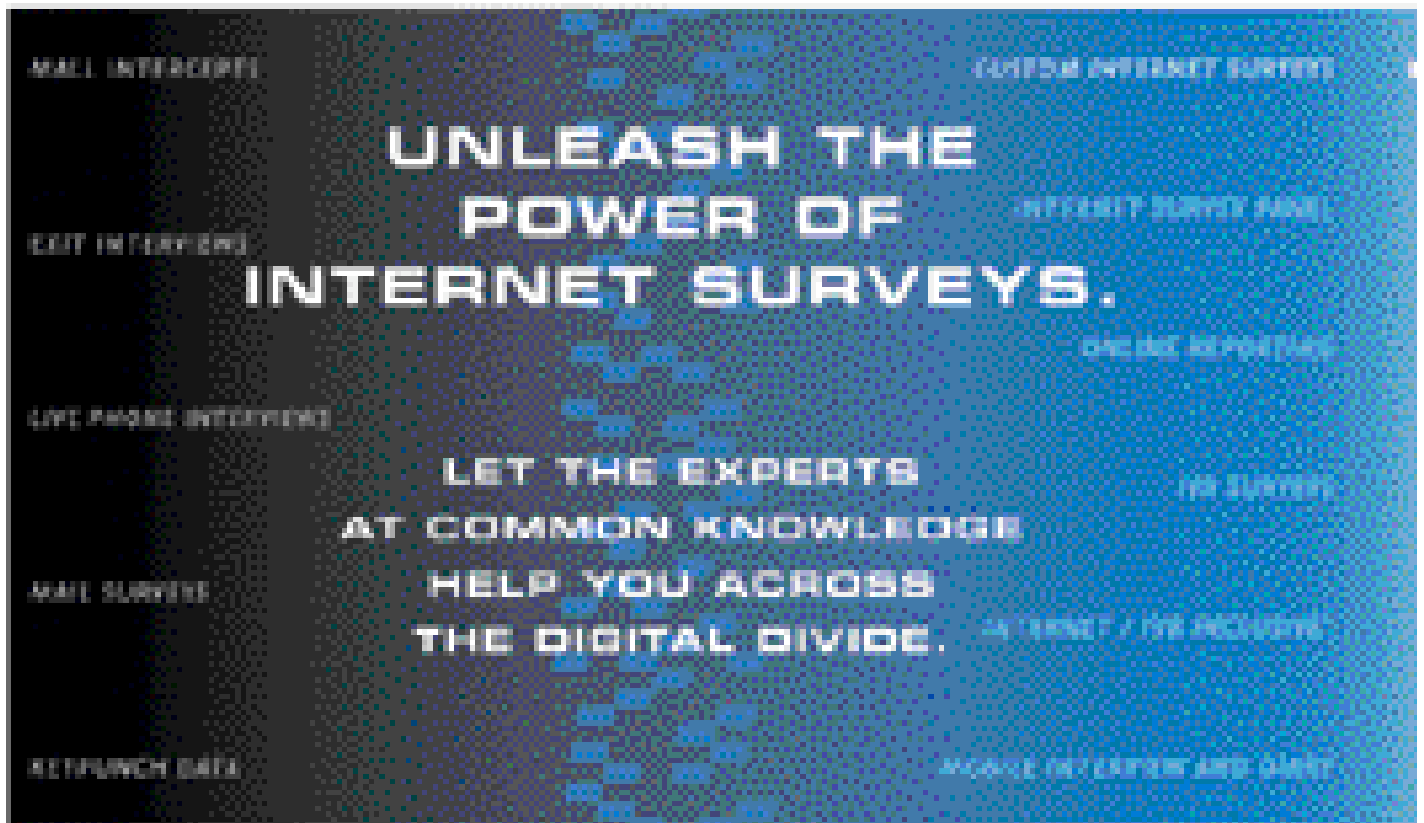
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results to bring innovative shows such as *All In the Family* to TV. The lesson: be cautious when evaluating well-entrenched iconic brands or revolutionary new products and concepts.

Gladwell has a knack for taking complex, often academic research and experimentation and breaking it down to relevant principals for us lay readers. He tells how intuition can be trained to “thin-slice” an experience. For example, “thin-slicing” allows art experts to immediately identify an artistic fake, or trained classical musicians to know whether an audition player is good or not after just a few musical bars. It is the same phenomenon which allows instant decisions to be made under stress, such as police officers deciding in a split second whether to shoot at an armed suspect or battlefield commanders giving orders to attack or retreat in the heat of combat.

Research can deliver

It becomes apparent in reading the

book that “blink” principles are certainly used by skilled and talented focus group moderators and qualitative researchers. In spite of the market research-bashing stimulated by the book, qualitative research can and does deliver exactly the kind of insight, deep understanding and creative leaps of faith prized by marketers. Here’s how:

- Moderators know how to look beyond the spoken responses of focus group participants. They quickly “thin-slice” based on experience to the critical factors that make a difference. They “mind read” effortlessly and automatically because the clues to make sense of someone are right there on the faces and in the demeanor of those in front of them.

- Moderators insist on being in the same room face to face with participants for focus group sessions. It allows them to “listen with their eyes,” register involuntary facial muscle response, “jiggle,” and other body language that feeds the moderator’s sense of what is really

happening.

- Experienced moderators know how to be cautious in conducting and interpreting focus sessions when the subject is something revolutionary or beyond respondents’ everyday experience. They will not throw out an idea or concept, but make allowances for unfamiliarity.

- With the experience of conducting and interpreting hundreds of focus sessions they become expert at decoding what lies behind snap judgments and first impressions. They do it formally or informally with a refined vocabulary to communicate with clients.

- Moderators encourage client personnel to observe and experience the sessions for themselves. This shared experience permits client buy-in and “leaps of faith” without excessive explanation and rationalization.

- Moderators insist on synthesizing and reporting interpretive results. It permits them the platform to deliver insights and intimate understanding that are the



Stop worrying about what is better

Flip through any research publication and there's likely to be at least one article expounding the virtues of one methodology over another. Focus groups are passé because there's too much peer pressure bias (or a dozen other reasons cited by the anti-focus-group crowd).

Online studies are superior to telephone interviewing because of immediacy...or cost...or falling phone response rates...or lack of interviewer bias...or (fill in the blank). A few issues later will come the articles extolling the virtues of focus groups and telephone interviewing.

And let's not even talk about mail surveys or mall intercepts.

Those who like to claim that a particular methodology is "the best" often have a vested interest in having more clients choose that methodology. I know the head of one small research company who decided he didn't want to travel and moderate any more. Rather than simply telling clients that, he decided it was time to promote the bene-

fits of telephone in-depth interviews over focus groups, and claim that focus groups were no longer a viable methodology.

Think about it: How many articles have you read claiming online focus groups are superior to traditional focus groups that weren't written by someone from a company that offers online focus groups to clients?

The real truth is, there's room for all these toys in the sandbox. One of the most overlooked keys to being a good researcher is not just using each tool properly, but choosing the proper tool.

Each methodological approach has fairly well-defined advantages and disadvantages. The trick is figuring out how each one of these applies to the project at hand and then selecting the right methodology.

Are in-depth interviews superior to focus groups or vice versa? Is telephone interviewing better than online surveys? Should you migrate your traditional focus groups to

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online focus groups? The real answer is that it depends on the project.

Let's look at one simple example: in-depth interviews versus focus groups. If the project requires reaching a small population that is scattered across the U.S. or in rural locations, or there are serious concerns about privacy issues or group bias, then in-depth interviews are a very viable option for gathering qualitative information. If group interplay can add value to the discussion, or you need to show various materials for respondents and get their reaction, and/or your client would really benefit from watching the project unfold, then focus groups are a better methodology.

For that matter, there's no rule that says you can't conduct some focus groups and supplement them with telephone IDIs.

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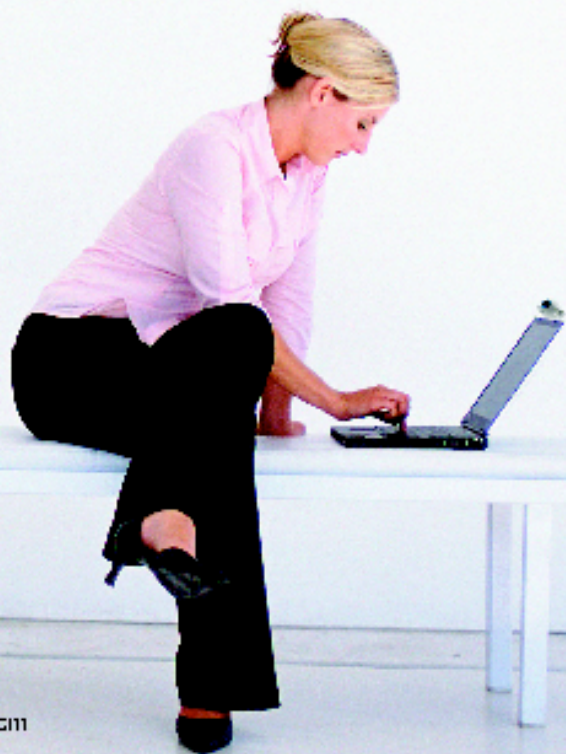
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Take any two legitimate research methodologies and you can make that same type of comparison. Telephone versus online? A significant portion of the population still is not online, while everyone has a phone. Online not only has sampling issues, but also concerns about a self-selecting sample and response rates. Of course, telephone has falling response rates, unlisted numbers, blocked calls and cell phone-

only households.

Online interviewing allows you to show complex graphics, play audio clips or even show streaming videos to people and immediately gauge their reaction. It's faster and often cheaper than telephone work and has no interviewer bias. Using panels, low-incidence populations can often be reached far more efficiently because the panel operator already knows which panel mem-

bers fit the study qualifications.

But telephone reaches a broader sample of the population than does online and it allows good interviewers to probe open-ended questions, which can't be done easily online. In many cases, it's also more secure than an online questionnaire, because you have more control over who is actually providing the data - it's pretty hard for a 12-year-old to complete a survey meant for dad about beer advertising over the phone. A good interviewer can also screen out respondents who aren't taking it seriously and keep a respondent on the phone who might have quit in the middle of an online survey.

Finally, phone surveys do not keep recycling the same panel members over and over. Consider an e-mail I recently received at work: "How do I become on the panel group (sic)? I currently participate in online studies at Go Zing, Survey Savvy, NPDOR, Harris Poll, SurveySpot, American Consumer panel, PSB, and many more groups. I'm looking for other groups that I have not been on yet. Thanks!!" You don't run into that with a phone survey.

So which is the better option? Again, it depends on the project. A good researcher will analyze the options for each project, and decide which methodology has the fewest risks and downsides while providing the most advantages in that particular situation. Even out-of-favor methods such as mall intercepts and mail surveys definitely have their place.

When clients come calling (whether they are internal or external clients), researchers are fairly well-trained to ask questions that help the client determine whether qualitative or quantitative research is needed (or both). But too many times, once that determination is made, the researcher falls back into his or her comfortable habits. "Qualitative? Okay - that means focus groups."

Well, maybe it does and maybe it doesn't. Maybe it means in-depth

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interviews or ethnography. Or, even if it does mean focus groups, maybe it means some creative approaches to those groups – giving respondents a disposable camera and having them take pictures of what a brand means to them, or having them create collages that illustrate how they feel about a particular product. Maybe it's focus groups with parents and children in the same room, or groups held on-site at a store location so the group can shop together and then retire to a back room to talk about their experience. Maybe it means doing something you as a researcher haven't done before – building something from scratch instead of dusting off last year's discussion guide and making a couple of quick revisions.

This can be particularly challenging when your client calls with an opening line of, "We need to do a phone survey." Trying to convince the client there might be a better way runs the risk of making them feel they weren't bright enough to come up with the best answer on their own. Often, what we resort to is the approach of, "Sure, we can cost that out for you. But I'd like to discuss an alternative with you that might be even more useful for this particular project. If you think it's appropriate, we can give you a cost on that approach, as well."

The point is, it's time we stopped always reaching for the standard answers. It's also time to put to rest criticism that certain methodologies are innately superior. One methodology is not better than another for every project. Online panels will not solve every quantitative need (nor will mail surveys, IVR or outbound phone surveys). Online focus groups are not going to replace traditional focus groups (nor should they be ignored as a possible approach).

Only when we stop worrying about what is better, and start worrying about what is most appropriate for this particular project, are we truly bringing to our clients all of the strengths that research can offer. | Q

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Shedding new light on an old flame

Sh erlock Holmes’ enduring popularity with readers arises from the excitement of watching him build important inferences from close observation of the details around him. While his alter ego, Watson, looks at things and sees nothing, Holmes extracts the relevant information that leads to the solution of the crime. Readers recognize that there is nothing magical about this process, and with good powers of observation and analysis, they could appear to be just as smart. Such is the inductive research method at work.

Ethnography, a research tool that is based on an inductive research approach, can produce exciting new findings for product developers, marketers, market researchers and advertisers. The current generation of market researchers has

expanded the qualitative toolkit to include ethnography in consumer research. The process of observation and interviewing in context, often with video and audio taping as well, has become fairly standard. It does this in the same way Holmes produced his successes – deep attention to what is happening, without imposing assumptions, until the

data reveals the meaning.

Ethnographic research needs to be approached in a way that maximizes the benefit of its inductive process and helps participants feel comfortable with the process. Otherwise, its open, interpretive and seemingly unstructured means of analysis can become a liability. In such cases, when the data has been collected, there are two types of problems that may develop. Some people will have already heard enough to have decided what the “solution” is, and then become disengaged. Others may feel overwhelmed by the quantity and diversity of the data and develop “analysis paralysis.”

SC Johnson uses ethnography to find fresh ideas for candle products

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So how can you ensure that projects not only conclude successfully, but also produce maximum value for the organization? If you look to the literature, the amount published on qualitative research is vast, but much of it appears to focus more on the data collection and project management than on how to handle the data after it is collected. The analysis stage of the project, particularly in a fast-paced business environment, is as crucial as collecting the right data. But it is perhaps not surprising that fewer writers address the challenges of analysis. Good analysis is a thoughtful and interpretive process, but one that is systematic, iterative and improved by structure even though the opposite appears to be true because of its initially unstructured nature.

Our experience, as shown in a recent project, points out the importance of an analytical process

that resembles a funnel, one that has a very wide top and a narrow spout. In other words, one needs to make sure that the approach is very broad at the beginning, but becomes very tight and focused at the end.

To illustrate this approach, we will use a recent ethnographic project at SC Johnson. The objective was to produce new ideas for an old, commoditized product line. As will be shown, key elements of this process included putting together a diverse team from the organization, talking to consumers on the fringe of some key trends, iterative debriefings which allowed for themes to emerge, making use of state-of-the-art analytical tools, and keeping the focus on an actionable outcome.

Setting the stage - making something old new again

While there is no historical record

of the first candles used by man, the earliest evidence of candle use dates from the fourth century B. C.

Candles have undergone many technological changes in the centuries since their early use, but they still consist of a wick of some sort and an energy source such as the wax used for candles today. The current candle market is highly competitive, saturated and becoming increasingly commoditized. So, how does a company with a product that has been around for centuries gain ideas for developing the next generation of that product in such a challenging market?

The candles research team at SC Johnson tackled this very problem. They decided to utilize the ethnographic approach to gain a deeper understanding of candle usage and meaning directly from consumers. The ultimate goal of the research was to identify and describe con-



sumer need states surrounding the experiential aspects of this product in several key areas. These needs would then be used to drive ideas for new products and next-generation candles. An additional goal, however, was to structure the project so that it would provide the context for aligning the organization around a future vision by collectively living through the research process. This second benefit of having a team approach to analysis creates the buy-in of the team members. Many times things like this are done by a few people and the results are just archived. This was a different story.

Following the funnel analogy, a broad, a cross-functional project team was formed that was led by SC Johnson's Research, Development & Engineering Department, with the assistance of Barbara Perry Associates. The project team also included members from the marketing and market

research departments and the company's advertising agency. Inclusion of team members from these particular functions was designed to allow the project to be as inclusive as possible during the collection and analysis phases of the research. The objective was to create ownership of the findings among all team members, especially key stakeholders and decision-makers.

The data - building blocks of creativity

The first steps in the project were carefully planned to ensure both effective use of the team and collection of a maximum amount of data. The recruitment of team members was followed by a brief training session to produce alignment on the research process, create a focused research guide and articulate commonly held assumptions within the company on candles and candle uses. This last activity produced team awareness

of the "lens" through which they would be filtering the data and helped them put aside pre-existing biases.

Respondents recruited for this study had to be heavily involved in candle use and also be considered "leading edge" on several key lifestyle, behavioral and attitudinal trends. Respondents were interviewed in their homes for an extended period of time and completed homework beforehand. The flow of the interview was to first understand their lives and values and then understand how the product fit into that context. The interview guide mainly served to ensure that we eventually covered all the categories and that all the interviews would have a basic set of data in common. However, by opening the control of the interview to the respondent, we obtained a variety of information that was broader and led the research in new and unexpected directions. Creativity in this project rested on the collection and organization of a wide variety of data that would allow the team to expand its thinking about the product category and pull in fresh insights about the way people had adapted it to their needs and attitudes. Our most important data consisted of notes, audiotapes, videotapes and pictures from in-home interviews as well as respondents' homework assignments (logs and collages).

In addition to what was collected in the field, the team also identified two other sources of data during the planning meeting that proved extremely valuable during analysis. The first was a collection of a wide variety of candle products already on the market that had been gathered for a different project. The second was a pre-screened set of old product ideas that, for one reason or another, had not made it to market. Transcriptions of audiotapes became the basis for our thematic analysis during the next phase of the project, which was our final

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**Coding and organizing:
working through the funnel**

The data analysis can make or break a project, because the original data themselves provide us with rich text. It is the researcher's challenge to take that data and create meaning, new directions and actionable implications for the organization. Continuing with our funnel analogy, the data analysis began in a way that was broad and inclusive.

It was a continuous process. We held lengthy team reviews and discussions after our interviews in each city. This "rolling debrief" process allowed themes, categories and new questions to evolve. In addition to sharing what had been seen and heard, team members visited stores in each city and brought back samples that conveyed some element of what was being learned. At the end of the last debriefing, we were ready to begin the process of moving toward the so-what challenge.

To begin this move, we needed to let the team work collaboratively through the data. Most of the team members realistically could only devote a very limited amount of time to this effort, due to the demands of their jobs. So a core team of researchers took the themes that emerged from the rolling debriefing sessions and, using NVivo (a qualitative software package from QSR International) created an online coding structure, with a tree logic, that incorporated all of the categories that had been discovered by the team plus any that emerged during this coding process. The software allowed us to create reports that sorted quotes across all interviews related to any one code. This "horizontal" look at the interviews made it possible to cross-check the categories we had developed. Did any look like they included material that was not really related? Were new sub-categories needed? We could also look for differences based on sorting the inter-

views by age or geography or any other basic segments that might seem useful. This was really the period of hypothesis-building. The rest of the team had the voices from the interviews in their minds as they went about their days and this became a period of fresh insights and deeper thinking about the data.

**Team analysis and ideation:
through the funnel we go**

After two weeks of coding the data

and generating the verbatims organized into themes, it was time to reassemble the full team and work through to the so-what at the end of the funnel. The team analysis took one day, which was made possible through careful planning and the use of materials that had already been organized and refined. To recreate the interview experience, we watched videotapes of the most important clips chosen for each interview. The room had posters

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made up of the collage materials created by consumers prior to our home visits. The software allowed us to create sets of consumer verbatims that team members could work on broken out by several coded categories. Using this material to determine the implications for new product ideas was a much easier task than working with the original interviews would have been. At the same time, because of

their involvement in the field, work team members were very familiar with all the interviews and could evaluate the importance of concepts overall.

Each team was challenged to take its set of coded interview material and identify the underlying theme, the consumer need that was relevant, and product ideas that would meet the need. This was done by scanning verbatims, cutting out the

most compelling, pasting them on flip chart paper along with their summary of the theme, need and product ideas. This exercise was the most challenging for the teams, requiring them to pull together their insights in a rigorous way. Each team generated as many as they could in an allotted time, and then reported back on what they had identified by presenting their information to the rest of the group. This is when the strongest themes began to emerge.

On the second day, to stimulate team creativity, we moved to reviewing and evaluating the product samples that had been collected. Each team member selected his or her three favorites, based on everything they had learned, and then explained to the group the particular physical product characteristics that were valuable or meaningful. The team then moved to an evaluation of old product concepts and applied a similar process of evaluation and discussion to these ideas. We found that some of these ideas were probably ahead of their time and may be worth reconsidering. By analyzing product samples and old product ideas in the context of what consumers were telling us, the team was able to make their thinking more tangible.

These two exercises took us to the bottom of the funnel - recommendations for new products. The team members moved smoothly to this stage, and true ideation started to flow naturally. They had many ideas for new products, all backed by the analysis that they had gone through. Altogether, the team produced numerous product ideas in a relatively short period at the end of this day. These were then reviewed for technical feasibility. Those determined to be technically feasible were moved on to the concept development and testing phase for new product ideas. The number of viable product ideas generated using this process (that is, ethnography followed by shared analysis and brainstorming) far exceeded that



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produced by typical brainstorming sessions. Again, due to the shared experiences of the team, the momentum is still there to move these initiatives forward.

Lessons learned

Analysis is often glossed over in discussions on research, and certainly in discussions on innovation. But analysis is the heart of what we are doing - taking information and squeezing out insights and implications. Project planning should focus particularly closely on this stage. Care should be taken early on to begin identifying existing assumptions and knowledge that may be challenged by new findings. In ethnographic work, the data is used for hypothesis-building - a very creative process which needs time to be effective. The researcher must obtain some distance from the data, after initially becoming familiar with it. Meanwhile, the brain is reworking the information and creating a new framework, new questions, relationships and insights. The creative conclusions are formed - they may come while driving to work, taking a shower or waking up in the morning. But they will emerge if space is created for this process.

It also helps to prepare carefully! Elements that can be arranged ahead of time all relate to the "broad" category. Putting together a diverse team from the organization, making use of analytical tools, leaving space in the schedule for contemplation, scheduling activities that broaden team thinking and keeping the focus on an actionable outcome all contribute to a successful project. The end result is alignment, commitment and energy, in addition to the new product, service or direction that was the project goal. The shared experience that team members have undergone and their ultimate convergence on a conclusion is irreplaceable in producing energy and commitment. Who said analysis was a tedious task? | Q

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Evaluating the impact of a great idea

Rising oil and gas prices affect every aspect of the United States economy as businesses, farming enterprises and households look for ways to reduce energy bills. Electricity, diesel and gasoline are the traditionally dominant fuel sources. However, propane is a safe and cost-effective alternative that has not yet achieved its full potential.

The Propane Education & Research Council (PERC) has made significant inroads to increase awareness of propane as an alternate resource. Recently, it has focused its efforts on the agricultural industry. This industry, which primarily

uses electricity and diesel fuel, used 1.6 million gallons of propane in 2002, and that figure continues to grow as producer attitudes toward propane use improve.

These positive changes in market attitudes and increased propane usage are due to

PERC's ongoing development of new applications. PERC has a lot riding on its assessment of market potential, and providing funding for the right idea could turn the tide for propane the way the light bulb did for electricity. With hundreds of possible projects vying for limited funding, PERC's challenge is to evaluate the impact of each project on the propane market, prioritize it and demonstrate its value to the propane producers funding the organization. It's a process that requires great insight into market needs and motivators.

Comprehensive research program helps the Propane Education & Research Council expand the propane market

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To help simplify the process and provide a solid basis for their investment decisions, PERC turned to St. Louis-based Osborn & Barr Communications. The agency developed a series of research projects that eventually helped PERC prioritize and fund new technologies that could change the nature of farming. A comprehensive, user-friendly research matrix now allows PERC to identify and quantify market potential for new agricultural technologies such as thermal agriculture, crop drying, engines, food safety, waste treatment and other agriculture reproduction areas.

Knowing the market

In phase one, Osborn & Barr provided an initial evaluation of the attitudes of agricultural producers and propane retailers toward propane for agricultural applications. A total of 750 growers/pro-

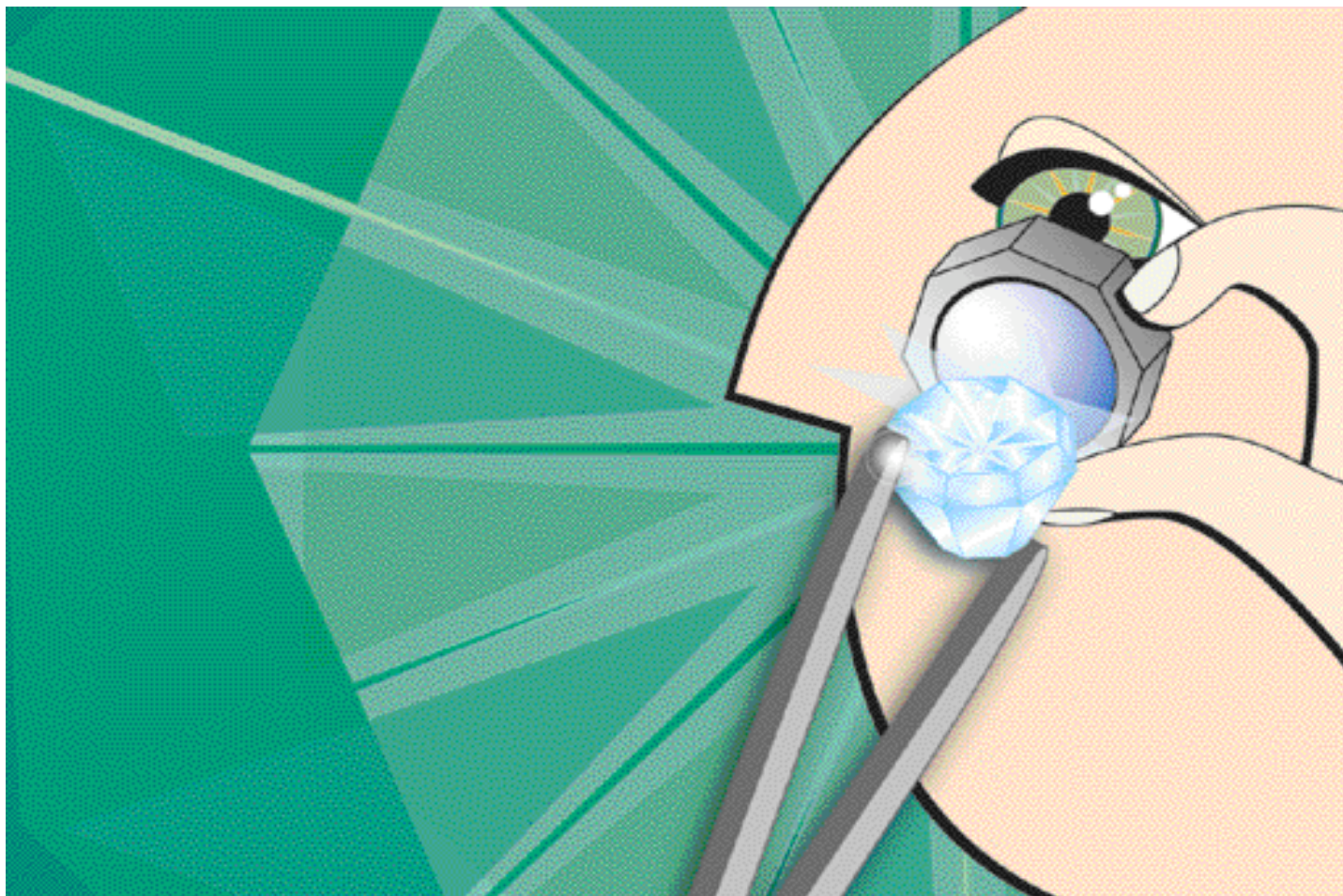
ducers reflecting the estimated universe of growers/producers were interviewed in January 2003 about their energy use and perceptions of various fuel sources. The study showed that producers/growers estimate they spend an average of \$32,813 per year on energy resources for their operations. Propane and electricity were rated similarly for customer service, environmental friendliness and availability. However, propane was considered to be much/somewhat better than electricity in terms of cost and energy efficiency by 31 percent and 29 percent of the respondents, respectively. Growers/producers were also asked about their awareness of advertising and promotional messages for various fuel sources and their likelihood of using propane for specific energy applications.

Armed with information about

grower/producer attitudes toward propane use in general, the next step was to be able to accurately evaluate the funding requests submitted to PERC. The PERC Agriculture Advisory Committee (AAC) needed decision-making tools and information across major agricultural commodities regarding the value, potential and impact of new propane-fueled applications on the propane industry. This meant in-depth knowledge of many different livestock operations, produce growers and specialty-crop growers was needed so the potential return on investment for agricultural commodities could be compared. Literally, they needed a way to compare apples to oranges.

Comparing apples to oranges: qualitative and quantitative research

Such an open-ended project was



challenging from the beginning. At the first meeting with the client, Osborn & Barr was asked to get a proposal ready...due the next morning. The AAC was meeting in just a few days and not again for another six months. Osborn & Barr was happy to oblige and developed a proposal for a comprehensive research project that covered the top 33 commodities tracked by the United States Department of

Agriculture. The goal of the research was to clearly define the size and scope of the total agricultural market from almond growers to wheat growers and beef producers to turkey producers.

The problem wasn't too little data, but an unmanageable amount of data that needed to be consolidated into a usable format. Statistics on the overall numbers of each type of producer and grower, along with

geographic region breakdowns, were collected. Interviews were conducted with individual producers, growers and key trade associations to ground the data with qualitative studies to find the meaning behind the numbers. The interviews uncovered a host of unmet agricultural needs as well as specific suggestions for future propane agriculture projects.

Commodities with similar production practices were organized around common themes and overarching findings. The research included detailed information regarding production operations, primary applications, major machines used and fuel usage. With this information, Osborn & Barr developed a production model assessing potential areas of investment. Related costs for each commodity, organic crop and livestock production were calculated.

Since organic producers represent an emerging market, a separate survey measured organic producers' knowledge and awareness of propane agriculture applications. The operations and costs of traditional producers and growers were compared to the organic production process. Research assessed which production costs were highest across commodities and within organic production and which groups were spending the most on fuel and energy. In sum, Osborn & Barr created a robust information tool that could be categorized and viewed in numerous ways to reveal where the greatest opportunities lie.

"As we developed the structure of the report, we did not aim to tell PERC where they should invest, but instead wanted to provide them with the appropriate information to make the best decisions," says Jeff Whetstine, account executive, Osborn & Barr. "The research provides an educational tool that will increase AAC's overall knowledge and understanding of the commodities, their production processes and marketplace conditions. As a result, AAC now has a tool for assessing



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which agricultural commodities hold the greatest potential return on investment, as well as which commodities should and should not be targeted. This tool is designed to empower AAC to make strong decisions regarding potential investments.”


From idea to reality

The in-depth quantitative and qualitative research provided by Osborn & Barr puts PERC in a better position to evaluate the likelihood of success for new or improved propane agriculture technology. The research will be the foundation for assessing marketing potential and disbursing funding for new propane projects. The next investment could be anything in any sector of the agriculture industry. Eventually, these projects will benefit the agriculture industry through new, efficient products and the propane industry through higher demand.

PERC is already putting its new knowledge to use in evaluating the potential of a project for the cotton industry.

“I think PERC will refer to this research quite often. It gives PERC the information necessary to deliver on its promise to use member funds responsibly and effectively. It’s a great stepping stone for PERC’s future in agriculture, and focuses them on really meeting the needs of producers in many commodity categories. The most exciting thing is the Propane Education & Research Council can make these ideas become a reality,” Whetstone says.

To that end, PERC has just released a request for proposals to design the technology for propane-powered weed control, one of the most frequent requests cited in the research. The technology will burn weeds between rows of crops without harming the desirable plants. Since the technology replaces herbicides, it is of particular interest to organic growers. Production of the time- and labor-saving technology could be in place in two years. | Q




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When you're not a pet rock

As a client or vendor, I've monitored or conducted tens of thousands of phone-based and in-person groups and individual interviews (not to mention the Web, since that's another article). It often seems as if the fundamentals have been waylaid by the seductions outlined below, spawning "we already knew all this" complaints. The thesis of these six deadly sins is that qualitative research is at best natural conversation and at worst performance art. Since you probably don't want to be a starving artist...

Henceforth, "researcher" signifies either the interviewer/moderator or a person that is selling, using or analyzing the study; in context, it should be obvious which. "Client" refers to both external clients and internal customers: marketers who need useful business intelligence for informed decision-making.

The top six reasons that they don't always get this information are:

- *Ask me no questions, I'll tell you no lies.*

Managing client expectations begins at the pitch stage, when researchers may allow clients to believe that flying or calling coast-to-coast ensures "nationally representative findings." You can characterize L.A./Phoenix/Chicago/Houston/Miami/Philadelphia results as "geographically diverse" but to act as if these respondents can represent all the potential respondents not there is counterproductive. Self-selection, recruitment and interviewer interaction biases are more prominent in any qualitative study, just as interviewer-assisted quantitative studies engender greater interaction bias than self-administered studies. If you need a nationally representative sample, you need quant. Multi-city qualitative studies cannot substitute for quant. "Semantics," you say. "We know qual is directional." Oh yeah? Read on.

Six qualitative research sins

- *Presto! Let there be quant.*

Under the illusion of "representativeness" noted above, researchers may bring quantitative instruments into the qual setting and report the aggregate (or worse, subgroup) results as if they represented individual data points, thereby choosing a quicksand pit as a building site. Though elementary, my dear readers, if you interview 38 people in your "national" qualitative project, whether singly or in groups, whether they represent 38 metro areas or three, you do not have an *n* of 38 independent cases. Only respondents in a few areas had a non-



By Laurie Gelb

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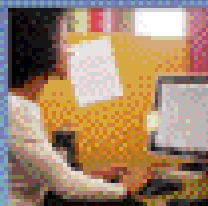
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zero chance of selection; there are more than 38 metro areas in the U.S.; three of your respondents may have signed up with the same research center as friends and so on. The misconception that qualitative findings should be cut-and-pasted into quant design rests on this faulty premise as well, but that's another story.

Qual must provide context that numbers can neither replace nor explain, or there's no reason to do it. It's reasonable to ask what someone would anticipate doing under certain circumstances, or how, if at all, participants would differentiate various stimuli. However, those answers are integrally connected to the "what, when, where, why, how" that presumably the rest of the interview has been about. Understanding this connection is the "beef" into which marketing can sink its teeth. If clients ask for quant instruments in exploratory settings, I politely explain why these could compro-

mise our objectives, and then outline what the research *will* do.

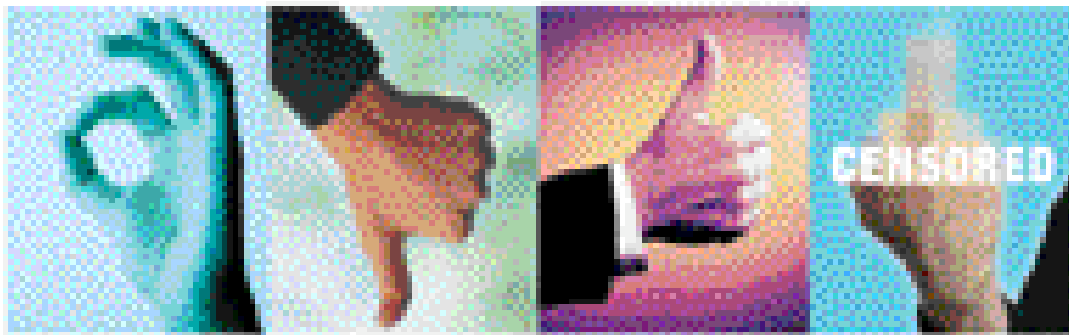
There's nothing wrong with yes/no and structured or numeric questions as they might occur in real conversations. There is something wrong with aggregating the results as if they were the Harris Poll, or separating them from their context. This also argues against routine "head counts" for questions or forced differentiation. The information the client needs should be in the verbatims, not a show of hands. Just because we can force respondents to comment that layout A is very "green" doesn't mean we learned anything. If we aren't presenting stimuli that can evoke different reactions and preferences and allowing exploration as to why the responses are different, we have brought inadequate stimuli to the table; torturing the respondents all night won't change that.

As for the notion that using card sorts, rankings, ratings and such will

"facilitate discussion," in over 20 years of interviewing (and twice that as a conversationalist), I can't recall ever needing a quantitative catalyst. Do you? Sometimes, perhaps, these tools are attempts to substitute for conversational skills/product category knowledge. But interviewers who look or act ill at ease should be given more prep/training, or replaced, not handed stacks of forms. Maybe good conversations aren't as easy to sell (sounds too simple?) or even deliver. But the effort is well worth it.

Besides wasting time, superimposing quant re routes the discussion. Mid-conversation with your friend, do you ask, "How was your date with George? Here, do this attribute rating task so I can more fully understand your viewpoints." When we try later to reconcile free-flowing conversation with eked-out data, we are no longer doing qual work, or anything else useful. Apples and oranges...

People have always talked with their hands.



Turnaround time often drives the perceived need to quantify qual, of course. However, given many options for fast-turnaround quant, there is no real justification for sacrificing qualitative fundamentals on the altar of deadlines.

• *It's not a product; it's a bundle of attributes.*

We could spend hours discussing how this assumption has constrained market insight for products where attributes are neither readily changed by the manufacturer nor independent (biopharma is an excellent example). "Which is more efficacious, drug A or drug B?" is a red herring in any setting. What qual can tell us is:

Do perceived efficacy differences, if any, actually affect decision-making between drugs in this class? If so, under what circumstances and why? If not, what does and how?

Qualitative is no better place than quantitative for the faulty assumption

that all decision-makers are consciously trading-off all attributes all the time. Nor is it a setting in which to "validate" attributes (domains and measures) and levels (threshold values) used to make decisions where the attributes are not universally salient and defined (two vs. three bedrooms is clear, a "crunchy" vs. "not crunchy" cereal less so). The shortcuts used to decide between products whose attributes themselves are a judgment call demand other methodologies, e.g., taste tests for the cereal or heuristic market research for pharmaceuticals.

• *It's been 15 minutes. I know these people now.*

"Jane, you indicated earlier that Thrill Park was open for an entire year before you took your kids there. Obviously, you're very cautious about new destinations. What would it take for you to go to Chill Park within two weeks after it opened?"

"Barney, you mentioned that you went to Thrill Park the day it opened. I'm assuming you plan to visit Chill Park on its opening day as well. No? Why not?"

Clearly, this is leading the witness. If your friend has just told you about a disastrous first date, do you immediately say, "Well, it's clear that you won't be going out with George again" or do you wait for her to tell you that? It's certainly going to take more than 15 minutes worth of experience with her to know!

When left alone to tell their story, people generally articulate the truth we are seeking. Recently, I interviewed individuals suffering from certain symptoms, most of whom had not sought help. Thirty minutes into our conversation, one deeply conflicted respondent confided his fear of certain medications because of past recreational drug abuse. Even knowing that drug abuse is common in this population, could I have broached that earlier and obtained

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the same response? Another sufferer ultimately admitted his concern that seeking help would create a pre-existing condition issue with his health plan. Again, not a Q1 finding. A third was worried about his commercial driver's license. And so on. Though I have also interviewed patients whose disorder can be transmitted through infected drug needles, I did not broach drug abuse to them, because not all of them

have this history. Airing your assumptions ices the dialogue.

Insight for us frequently requires introspection and even self-discovery for the respondent. An engaged participant is building/sharing something, not getting to the end. There is always more to say. When interviewers treat an interview as a straight line, words on paper, subjects clam up, join the race and accept the constraints implied. They're being

paid to. But that only costs the client, ultimately. Techniques to establish rapport and encourage conversation are found in "Establishing a Comfort Level" by Jim Eschrich. (*Quirk's*, April 2002; viewable at www.quirks.com/articles/article.asp?arg_ArticleId=985)

• *The discussion guide as personal flotation device (PFD).*

This was my pet peeve as a client. Qualitative researchers, as opposed to copy readers, are paid to ask the questions that are not on the discussion guide and never can be. The raison d'être of qual is to follow the respondent's context, not provide it.

Joe says, "I can't really distinguish between widgets and digits." We should ask, "And why is that?" And then depending on the response, maybe, "Under what circumstances could that change?" or a more specific follow up. What I too often hear is, "OK, let's go on to the next question." Arrrrgh!

Sally explains, "Those criteria don't make sense to me. I just go by the blue color." Next should be, "Is there anything else you have ever considered besides the blue color?" Or, "Are there ever times when the blue color is less important?" I cringe to hear, "Does it matter what shade of blue it is?" and then watch the interviewer move to the next topic.

Questions like "How will this study be used?" or "Has anyone else mentioned that?" or "Who's sponsoring this study?" often generate mumbles, haughty comebacks or refusals to respond. Agencies should draft pat responses for client approval and train interviewers to partner with, not patronize, the respondent. For example, if the sponsor must remain blinded throughout (not a given; sometimes the conclusion is a good time to uncloak with a couple of wrap-up questions), one possible answer is, "The identity of the company sponsoring the study is confidential, just as your identity is kept confidential." It is not a blow-off like "I can't tell you that" or the disbelieved, even if

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true, "I don't know."

In order to follow the respondent's lead, and talk about what's important to her, researchers must be familiar with the topic. When they aren't, sometimes the only unscripted words spoken are the ubiquitous "OK," or even worse, "Good" or "That makes sense" or similar reinforcement. Or the fishing line probe: "Can you expand on that a little?" or the ever-so-precious, "Tell me more." When did you last speak those words out in the world?

Another PFD danger is the rush to get all the canned questions in, manifested as patting the respondent on the head after short answers and interrupting long ones. An approval-seeking exchange creates a breezy but superficial conversation, and a skilled interviewer nips it in the bud by probing objectively: "Just to play devil's advocate..." but never, "Many of your colleagues have said..." An interviewer should gently decline to restate the majority

viewpoint: "This is about what you think/how you reacted to that/made that decision at the time." Certainly, we want to know if the respondent would make a different decision today, but we want to find that out without seeming to pass judgment on her.

In groups, the PFD mentality sends the moderator around the table with the dreaded, "What do you think, Ryan?" though poor Ryan has contributed to eight straight questions and is now trying to guzzle his soda.

You might casually ask a lunch colleague, "What about you, Anne?" but Anne knows she can say, "Oh, I dunno" without becoming an outcast. Focus groups are not election booths, which are private. If you need bared souls, book one-on-ones. Moreover, groups as opposed to individual interviews are only appropriate when the probability of achieving the objectives is greater with consensus than without it. Yet

groups are often booked for less substantive reasons (such as scheduling). With today's Web-enabled facilities and phone monitoring, travel preferences should never dictate research strategy.

Repeating questions is another common consequence of the PFD approach, and nothing derails a conversation faster. The respondent becomes bored, impatient, even angry. "Isn't this person even listening to my answers? Why am I talking, then?" (Would your boss stand for this?) Any client who berates an interviewer for not asking Q13 when the topic already was covered in Q6 needs tactful education. "We had already covered that, so I went for his reaction to the fried egg concept. I know we will need to use our time as efficiently we can."

• "Tonight's performance is sold out."

That sentence sums up many interviews. We've all seen the interviewer whose self-importance is

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exceeded only by his ability to express it. “What I’m looking for is...” “That’s not what I meant.”

The only legitimate uses of “I” in probing are non-judgmental, e.g., “I guess I’m confused – I thought I heard you say earlier that you only buy blue widgets but just now you spoke of preferring green ones?” Otherwise, substitute “you” for “I” and see how much further you get. Do you tell your colleague, “Carl,

what I was looking for you to tell me was what Mark thought of the report” or do you simply ask, “What did Mark think of the report?” Presenting the interviewer, a person the respondent has (hopefully!) never encountered before, as someone whose needs must be met heaps pretense on an already artificial context. And if you are using professional respondents for whom this is no big deal, you’re

even worse off.

Interviewers who “rep” any point of view (like the client’s) also taint the feedback. Anyone who thinks the interview would be smoother if she follows the path of least resistance must either follow or become oppositional to that viewpoint. None of that will hold up once she’s gone. Being truly persuaded (not bludgeoned) by other group members is fine. External influences on decision-making exist, and if we engage participants, they will tell us when/how that works. But we have to understand first what the respondent was thinking before she walked into the facility or picked up the phone. If we fast-forward past that point, we’ve lost insight in which we invested.

Finally, when the play’s the thing, the researcher vamps to his clients/colleagues, takes stage direction during and between interviews and agrees (outwardly) cheerfully to instructions like:

“Wrap this one up. This guy is clueless.”

“No one’s responding to ad #3. Make sure you get more out of them.”

“The whole group hates the double-page spread. Let’s leave it out from here on.”

Following these suggestions blindly could obviously compromise results. But what mid-project adaptation is actually useful? The short answer is, do what the project needs, err on the side of inclusion and justify it in terms of the objective, with minimal use of “I” or “you,” two words that in a client/researcher discussion may breed defensiveness or aggression. We’re aiming for smiles and nods during the final presentation; we may not see as many in the viewing room.

Be a chameleon

Perhaps the best advice for qualitative researchers and clients resembles Ray Bradbury’s advice to writers (keen observers themselves): “Be a chameleon, ink-blend, chromosome change with the landscape. Be a pet rock, lie with the dust...” | Q



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Online in-depth proves its promise

There is a point in the evolution of a field when a critical mass of new possibilities is reached and the field makes a big leap forward. We watched it happen with the Internet. After decades of advances in networking and information retrieval technology, the early '90s saw a flurry of activity, highlighted by the creation of the graphical browser and the World Wide Web. Soon most companies had a page on the Web, but it was only a static page - essentially an online brochure. The tipping point came when other technologies such as databases were linked to the Web. All of a sudden a company Web page went from being an online brochure to being a full-fledged storefront. The era of e-commerce had begun.

Qualitative research is undergoing a similar transformation. We have a new set of electronic tools to conduct our research, such as digital cameras and online communication technologies like e-mail, bulletin boards, and more recently, blogs. With most American consumers now online, many with broadband connections¹ we are fast approaching a critical mass of interrelated technologies that will usher in a new era in qualitative research.

At present, online qualitative research is at a stage similar to online brochures. While we're already doing focus groups online, gathering more in-depth information online is still a new frontier.

To see how far we could push the envelope, we recently designed and executed an online in-depth qualitative research project.

Specifically, we wanted to learn:

- Could we expand the online qualitative research format beyond bulletin-board discussion and chat-based focus groups? Would participants be willing to engage for longer periods of time?

- Could we get better in-depth data by mixing methodologies?

Could we successfully use individual,

group and contextual techniques within the same study?

- How deeply could we engage participants? Would they disclose emotional details? Would they enjoy the experience?

To test these ideas, we created the Parenthood Project, a research effort that sought to learn how values and lives change when people become parents. The topic is deeply personal, so we felt this would be a good test of our participants' willingness to share their emotions and viewpoints online. It also lent itself nicely to studying two perspectives on the same experience of parenthood. We gathered data separately from both new


Respondents stay active, engaged



By Steve August and Kimberly Daniels August

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moms and new dads in the same family and then compared the results.

Designing and executing the project

For the Parenthood Project, we recruited four couples in each of three markets (New York, San Francisco and Houston). Each couple had children between the ages of 1 and 4. Since one of our research goals was to see whether we could gather two different perspectives on the issue from within one family, we screened for participants within a family who were able to participate separately (at different e-mail addresses). We also screened for ownership of a digital camera, because we wanted to experiment with the use of images to provide us with more context about the lives of our participants.

During phase one, each participant was given a private blog where they could create their own online journals for the project. Over the course of five days, we presented participants with a set of images and a set of questions to engage their thinking on various aspects of their lives relating to parenthood. We then asked them to share their reactions to what we presented and record their thoughts in their online journals. We also created a photo exercise in which participants took

photos representing aspects of their lives before and after becoming parents and posted them in their online journals. The photo exercise added a visual window into participants' lives and thinking.

Phase two featured group discussion using a bulletin-board format with a facilitated discussion, which took place over two days immediately following the first phase. The discussion topics were fueled by our analysis of the journaling exercises from phase one.

To execute this project design, we needed an online research platform that would support private and group journaling and/or blogging, group discussions, online in-depth interviews, customizable profiles, and a customizable look and feel. We were unable to find a ready-made platform that met our specifications, so we created a platform with these features specifically for this project. As a result of this successful proof-of-concept, we are moving forward in using the platform, called KDA/Revelation, in our new online in-depth research service.

The research findings from the Parenthood Project gave us deep insight into our topic. However, since our fundamental goal was to learn about the methodology, we

will focus here on those results.

Results of the new methodology

After the two research phases, we conducted a post-project survey to learn about the experiences of our participants and to help us assess the success of our system and method.

By carefully designing the study and clearly communicating the study requirements to participants, we were able to keep participants engaged over the course of seven days, and the results of our post-project survey suggest that longer and even deeper engagements are realistic possibilities.

Our participants contributed an average of two hours of their time over the course of the week-long project. Several participants spent three and four hours. Keeping in mind that these were new parents, this is a substantial investment. None of the participants said they considered their investment of time to be too large. Most respondents said the amount of work required was just right, and several said they would have liked to contribute more time.

As a point of comparison with traditional qualitative methods, consider that some research has shown the average length of speaking or air time for a focus group participant to be 10 to 12 minutes².

We were pleased with our ability to engage our participants deeply.

Participants shared intimate details of their lives regarding their relationships with their spouses, their children and other aspects of their lives as parents. All of our participants said they enjoyed the experience. Many of them said they appreciated the opportunity to reflect on the issues, and that they had learned something from the experience.

The online format was popular with our participants. In the post-project survey, our participants told us that they found it easy to use the online format (two-thirds said very easy, one-third said somewhat easy). All of them said that the study tasks were clear to them and that it was clear how to execute the tasks. The use of images worked very well, both as a technique to elicit responses and in terms of



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logistics. Our participants had no trouble taking digital photographs and posting them to their online journals.

Mixing individual journaling with group discussion worked well. The follow-up discussion gave us another layer of insight into the topic, and allowed us to test new hypotheses that arose during the course of the project. We learned a lot about how the views of new parents change in areas such as work and money, relationships and self-image (our pre-determined topics). But we also learned about new avenues for exploration from the content of the online journals of our participants. As an example, one of the themes that emerged from the online journals was a sense of vulnerability on the part of many new parents. Our online methodology gave us the flexibility to explore this newly surfaced issue in Phase Two.

This ability to build and test hypotheses on the fly is a significant benefit. It's widely recognized that one of the most common outcomes of research is the need for more research,

yet most research budgets don't expand as quickly and easily as a client's information needs. Online in-depth allows us to build on what we learn within the course of one project. This squeezes a tremendous amount of value out of one research investment.

Ways to improve

Naturally, our pilot project showed us some ways we can improve. For example, one thing we would do differently in future projects of a similar nature would be to build in a bit more time between the journaling phase and the discussion. The journals were so rich in information that we had to rush the initial analysis to keep up with our project schedule. As we apply online in-depth, we expect to find additional ways to improve the process.

Online in-depth is not, of course, suitable for every project. One clear limitation is that there are some populations not yet online or not yet comfortable online. We expect this limitation to decrease over time as Internet

adoption rates continue to climb.

Online in-depth offers researchers the ability to employ multiple methods, develop and test hypotheses on the fly, and stay engaged with participants over longer periods of time. The more time we as researchers can stay engaged with participants, and the more we can integrate our inquiry into the day-to-day lives of the people we study, the better our opportunities to develop a deeper and richer understanding of customer attitudes and behaviors.

By making it easy for participants to give of their time, and cost-effective for researchers to deliver actionable insight, online in-depth provides a promising new way for researchers to learn more from participants and maximize the value of every study. | Q

References

¹ According to the most recently available Pew Internet survey (www.pewinternet.org), roughly 65 percent of Americans are now online. Of these, 55 percent have broadband access at work and 39 percent have broadband at home.

² Gerald Zaltman, *How Customers Think*, p. 123.



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Should you choose an internal or an external moderator?

“Trudy, do you think you should moderate these focus groups or should we hire a vendor?” As a trained and certified focus group moderator at Nationwide Insurance, this is a common question for me.

Knowing that other companies ask the same question of their internal moderators (and having been invited to speak on the topic at two research conferences), I was prompted to conduct some research of my own. I set out interviewing several types of market research professionals including internal, corporate moderators who work with vendors and those who have worked as vendors themselves. Several key findings and confirmations surfaced.

Moderators have a vital impact on the focus group project, from the initial consultation with the client, writing the screener, coordinating or actually recruiting participants, writing the guide, moderating the groups, to finally presenting the findings.

When a focus group moderator is needed, several questions must be answered:

- Can an internal moderator better serve the client?
- Are the desired participants employees of the company, customers or consumers?
- Can an internal moderator lead the group without adding bias?
- What are the logistical considerations (budget, access to the focus groups, audio and visual recording)?

A look at the pros and cons

Internal moderators

A corporate employee focus group moderator is most often the best choice when conducting employee or corporate-related focus groups. Recruiting is easy, inexpensive and convenient. The groups can be held onsite or over the telephone with

the internal moderator facilitating the call, significantly reducing costs.

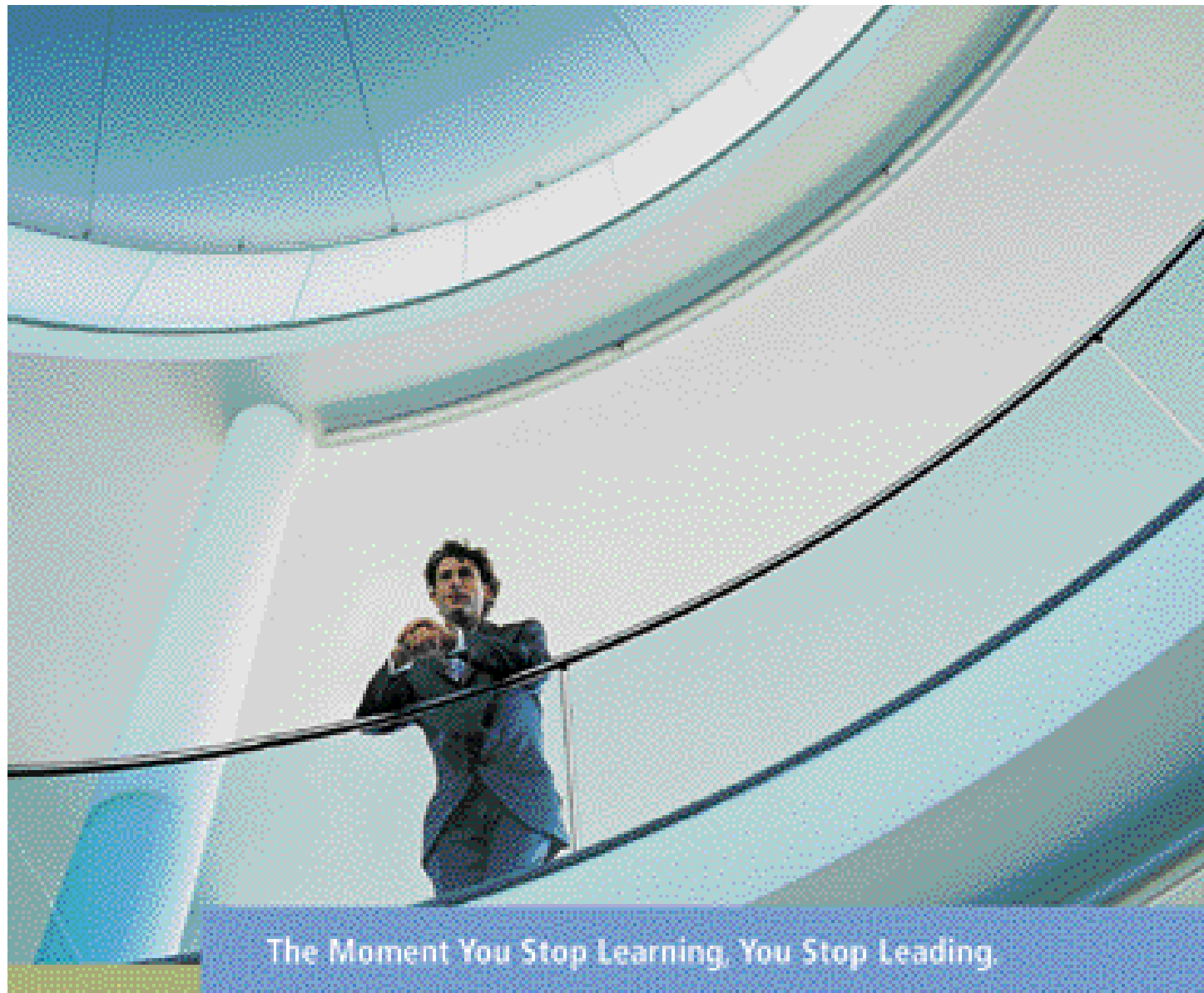
Internal moderators can often discover nuggets of information that an outside vendor may miss. I have conducted several focus groups with consumers, customers, employees and agents about issues specific to the insurance industry or company. My 13 years with the company often allow me to dig deeper into the comments of participants and uncover useful information that my client may not have thought of at the outset of the project.

For example, while moderating a focus group with employees



By Trudy Ann Brandenburg

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about improving employee benefits, one participant made a passing remark about an area of the building. Knowing the specific area of the building and discussing it further with the group helped me deliver additional information in the final report. Based on the information, my client implemented the change in the building area which had previously never been a consideration. An outside vendor, lacking knowledge of the building area, would have been unable to probe into the

comment.

Occasionally, I work with internal clients on other projects prior to their becoming my client. This is often helpful as I am already familiar with the areas they work in, allowing me to know more about their information preferences, needs and expectations. Prior work with a client often helps me write a more focused report on the findings.

And, since both client and moderator work in the same building or

complex, they can work more closely throughout the course of the project, which can help the internal moderator provide more actionable information.

Depending on the project and budget, internal moderators may be appropriate to moderate consumer and customer groups. While a vendor facility may be chosen to recruit participants and be the location for the groups to be held, an internal moderator may not only be more familiar with their client, the industry and the company but can also eliminate external moderator fees.

Finally, it is important to keep in mind that information delivery is just as important as acquisition. The internal moderator usually has a better understanding of the company and its nuances and the industry in general, and really knows the client's needs and the communication and report formats the company uses. This may not only save time from possibly having to rewrite a vendor's report but also allows the results to be delivered in the most useful and internally-preferred format.

Set of challenges

However, choosing an internal moderator can present its own set of unique challenges. Clients who are top executives within a company may try to control the moderator and the focus group project or set the tone for the results. An internal moderator must possess the skills to deal with political issues from the onset of the project and be able to deliver the findings diplomatically.

Not only have I sometimes previously worked with my clients, I sometimes know the participants. When this happens, it is imperative that it does not impact the dynamics of the group.

Recording and observing internal focus groups can also be problematic since most of them are held in a conference room rather than a facility with professional recording and behind-the-glass viewing. I often audio-record internal focus groups on a hand-held recorder. In addition, it is important for observers to



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sit in the back of the room as much out of the participants' sight as possible. Participants, who are often employees or agents, may be somewhat intimidated with executives in the room. If the observers are out of their sight, the participants are more likely to speak candidly, especially if they have something they may view as negative to say.

It is in a company's best interest to maintain trained moderators on staff even if they do not moderate groups. Staff moderators understand the focus group process and can work with an external moderator throughout the project and act as the project liaison between the internal client and the vendor. Internal moderators can also analyze vendor reports and distribute information appropriately within the organization.

External moderators

External moderators are extremely valuable in gaining insights about

customer and consumer attitudes. They may be more capable of looking at the project from different perspectives mainly because they are not attached to the company in any way. They also may offer different focus group techniques based on their experiences with different types of groups in different industries.

Professional focus group facilities offer consumer screening and recruiting services as well as moderators. Using an external moderator allows internal personnel to work on other projects and could actually reduce company travel and expenses.

Recording and viewing the focus groups are also much easier at a professional facility than the conference rooms that are often used when groups are held by internal moderators at company sites.

Working again and again with the same external moderator can create a valuable consultant relationship. In time, the moderators become more

familiar with the industry, the company and its information preferences, which enables them to deliver more targeted findings.

Need for both

There is clearly a need for both internal and external focus group moderators. While internal moderators may offer more depth because of their knowledge of the company and industry, an external moderator and focus group facilities may be best when you need an outside perspective, assistance with screening and recruiting, and professional recording and viewing capabilities.

Corporate market research departments that offer their clients both professional internal and external focus group moderators are in a better position to provide world-class service to their clients. Internal or external, every moderator's job is to acquire quality information and deliver it in a manner that is most useful to the client. | Q

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Not quite everybody, it seems

As product and service offerings across all industries become more and more sophisticated, manufacturers and marketers must continue their efforts to better understand both consumer psychology and the psychodynamics of the production process. Nowhere is this more evident than in the turbulent world of television, where “going by gut” is an all-too-accepted method used by seemingly sensible executives in a multibillion-dollar industry. Failure to understand the psychographic intricacies of the marketplace and even the psychodynamic subtleties of the creative production process can often cost entertainment corporations hundreds of millions of dollars in profit and deny viewers memorable programs, as truly profitable (and worthwhile) shows are never developed or sufficiently supported while mediocre programs abound.

Nonetheless, some shows that struggle to reach the air and/or struggle early on the air, like *Seinfeld*, *Cheers* or *Everybody Loves Raymond*, occasionally escape this fate and become both audience favorites and huge financial windfalls for their corporate parents.

A study of *Everybody Loves Raymond* – which was heavily criticized by in-house CBS research findings born of a method that ignored the psychographic properties of the television market – can perhaps shed light on ways to invigorate market analysis techniques and keep them up to speed with the pace of product innovation.

To begin with, television program production and marketing are integrally related. In fact, one major problem is that the two are often tangled together and confused as one. In analyzing this complex field, a framework is needed through which the many different influences in each area can be effectively isolated for study. A basic framework from Marketing 101 such as the four Ps of the marketing mix (promotion, pricing, placement and product) serves this purpose well.

Promotion

Promotion – in the form of advertising, on-air promotions, conspicuous branding (i.e., “from the producers of *Friends*,” etc.), “star power” casting, personal appearances, magazine covers, favorable reviews, strong word of mouth, publicity stunts, and so on – can be a very influential element in the successful television pro-



By Ken Newman

Early focus group findings nearly spelled the end of *Everybody Loves Raymond*

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gramming marketing mix. Promotion has never been a Hollywood shortcoming; however, its preponderance may sometimes be an overcompensation for poor strategies in pricing or placement or for a weak product.

Pricing

In television, the only direct cash cost paid by most viewers is their monthly cable or satellite bill. Often including extra fees for premium networks and services, for gatekeeper competitors like cable and satellite providers, pricing is an important consideration in determining marketing strategy. That said, however, even accounting for premium networks like HBO or Showtime, the dollar cost of a given program on a given network is difficult to break down by program and, more importantly, is of less interest to the viewer than the choices of shows themselves. (Obviously, alternatives in the form of home video and pay-per-view/video-on-demand do also exist - and are in themselves businesses that demand serious attention - but the market share for these substitutes rarely reaches or exceeds 5 percent according to Nielsen research, so they are not as important here in analyzing the pricing strategies needed to attract the other 95 percent of the market.)

Instead, inherent in the transaction between viewers and programmers is the amount of attention viewers are able or willing to "pay" to a particular program. Further, the capability of individual viewers to pay attention to programming is in turn influenced by three other factors: their psychological makeup/attitudes, their mood and their time budget.

Psychological makeup/attitudes

Intellectual products such as television programming are primarily of cerebral and/or emotional utility to viewers. It is widely accepted that demographic characteristics such as age and sex play an important role in influencing a viewer's programming preference. However, based on Nielsen research, the uneven distribution of viewers among these demos for any given night suggest that age and gender are not the sole influences for

viewing preference. An individual's overall psychological/attitudinal makeup - which is strongly influenced by their age and gender (as well as other demographic categories like education level, kids in the household, etc.) - is a better means for predicting viewers' interests.

Mood

Related to an individual's psychological or attitudinal makeup is their mood. As people's personalities differ, so too does the frequency and variability of their mood. Mood can act as a modifier to viewers' baseline behavior and attitudes, changing their resulting viewing preference. In turn, as viewers' moods change, they might migrate from one psychographic/attitudinal segment to another nearby. For instance, a viewer who falls in the Quality Watcher segment (see text box) might migrate towards the Fashion/Trend Conscious segment to watch a guilty-pleasure action drama like *24* after a long day of work. Or perhaps a Fashion/Trend Conscious viewer, after an equally tiring day, might migrate towards the Home and Hearth segment to watch *Joan Of Arcadia* for a feeling of inspiration.

Accordingly, as moods can vary throughout the day (with mood changes among viewers within similar market segments remaining approximately parallel as a function of their shared lifestyles/attitudes/psychology), it is important to keep in mind that the programs a viewer might watch during the day could be different than the ones they would view in the afternoon or evening or on the weekend or, for that matter, with children, parents or friends present. Even more, moods might change from watching programs themselves, as a viewer who is "laughed out" might switch away from comedy to drama or news or reality and/or vice versa, or even (to the consternation of television executives) turn off the television set altogether in favor of another activity.

Time budget

Although a particular program may be in line with its targeted viewers'

Primary Psychographic Segments

• Fashion/Trend Conscious: younger, urban and female-skewing, comprised heavily of Myers-Briggs "feelers," a more emotional audience segment given to liking soap operas/serials, trendy/hip shows, shows with "heart" or "drama."
Examples: *American Idol*, *Will & Grace*, *Sex and the City*

• Quality Watchers: older and male-skewing, comprised heavily of Myers-Briggs "intuitives," an audience segment demanding "authenticity" given to liking "groundbreaking," "innovative" programming.
Examples: *60 Minutes*, *Seinfeld*, *The Sopranos*

• Home & Hearth: older and rural-skewing, comprised heavily of Myers-Briggs "sensation/judgers," a viewing group given to liking traditional themes, family programming and uplifting messages with happy endings.
Examples: *Touched By An Angel*, *Home Improvement*, *8 Simple Rules*

Hybrid Psychographic Segments

• Fashion/Trend Conscious and Home & Hearth: comprised of viewers who enjoy "hip/trendy" programs with "heart" or "drama" and traditional values and themes.
Examples: *Malcolm in the Middle*, *Survivor*, *Joan of Arcadia*

• Fashion/Trend Conscious and Quality Watchers: comprised of viewers who enjoy "groundbreaking" programs with "heart" or "drama."
Examples: *Friends*, *Six Feet Under*, *24*

• Quality Watchers and Home & Hearth: comprised of viewers who enjoy "authentic" programs with traditional values and themes.
Examples: *Everybody Loves Raymond*, *CSI*, *ER*

tastes and even their moods, the viewer may still not be able to commit time or pay attention to the show if they don't have the time or if they

can't afford the time. Viewers can make time to view a particular program, but at the expense of other programming or another leisure activity.

Accordingly, time budgets have a definite limit (with time budgets among viewers within similar market segments also remaining approximately parallel as a function of their shared lifestyles/attitudes/psychology). Only so many shows appealing to the same audience can succeed until the market becomes saturated. In turn, new programs introduced into a crowded market segment might fail (or at least dilute viewership for other programs appealing to the same group).

Placement

The third of the four Ps of the marketing mix, placement (or time-period scheduling), requires identifying the time and place to air a program to maximize its potential viewership. A program will not be seen (purchased and consumed) if it is placed inconveniently with respect to the targeted viewers' schedules and locations. (To some extent, though, time-shifting with VCRs and TiVo has freed viewers from

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being forced to adhere to such rigid concurrent purchase and consumption demands, although their use rarely accounts for more than 5 percent of the marketplace at any given time. Also, the ubiquity of remote controls has allowed viewers to “shop” with greater speed.) Nonetheless, scheduling/placement strategies are influenced by five key components: distribution capacity, competition, circulation, awareness

and identity.

Distribution capacity

The four major broadcast networks – ABC, CBS, NBC and Fox – are each available to nearly 100 percent of viewers. They are the television equivalent of high-rent, multi-level department stores with huge parking lots. By contrast, WB, UPN and cable networks like CNN, MTV, ESPN, HBO and Showtime are available to considerably fewer viewers, varying from roughly 70–90 percent of all potential viewers. Their lesser distribution capacity makes them the television equivalent of boutiques and chain stores, with lesser retail space, and/or smaller parking lots.

As a result, each network, as a function of its distribution facilities, has varying structural advantages and weaknesses. The broadcast networks, with their superior distribution capacities, can serve viewers in sufficient volumes so as to allow them to reach a critical mass of viewers, guaranteeing them premium advertising rates. The drawback is that they face the economic imperative of targeting large market segments, simultaneously cramping their scheduling/placement flexibility. Anything that might limit their audience, from narrow-appeal programming (which also may include programming that is slow initially to find an audience) to multiple repeats throughout the day, is generally a difficult placement strategy to pursue, as certainly as Macy’s or Wal-Mart might suffer if they were to limit their retailing exclusively to young men’s and women’s clothing or to repeat the same items throughout the entire store.

Cable networks, with comparatively less-expensive distribution facilities, albeit with comparatively less potential for advertising revenue (or in the case of HBO and Showtime, no advertising revenue, but subscription revenue), are structurally unable to accommodate large audience segments and are thus freed to focus on smaller niches, allowing them to employ a wider variety of scheduling/placement strategies from narrow-appeal programming (which may

also include programming that is slow to find an audience), to multiple repeats. In turn, smaller networks do in fact focus their scheduling/placement strategies to serve their niche audiences, extending the earlier analogy, in much the same way that The Gap or Abercrombie and Fitch specialize in young men’s and women’s clothing with greater zeal than Wal-Mart or Macy’s.

Competition

Again, unlike a retail store where customers can browse and shop at leisure with the assumption that desired items will be in stock when they are ready to purchase, television programs have a much narrower window of availability and therefore demand a more immediate “sale.” Competition from other networks in the time period complicates this dilemma further as viewers (those not time-shifting with VCRs or TiVo) cannot consume two programs simultaneously, forcing programmers to carefully consider rival network schedules with respect to their potential to siphon away already difficult-to-reach viewers. This involves fits of gamesmanship and strategy amongst network executives, a chess game of sorts, rife with the potential for error, which is sometimes independent of otherwise optimal individual program scheduling/placement strategies. In fact, some shows (especially new shows) can be knowingly shoehorned into time periods where networks know they won’t connect with their target audience for a variety of strategic competitive reasons that are good for that network as a whole but not the new show.

Circulation

The circulation of a network is, essentially, the total amount of a network’s viewers. Understanding the levels of existing viewership/circulation throughout a network’s schedule and grasping those viewers’ respective programming interests is required before a program’s optimal time period placement/scheduling strategy can be devised.

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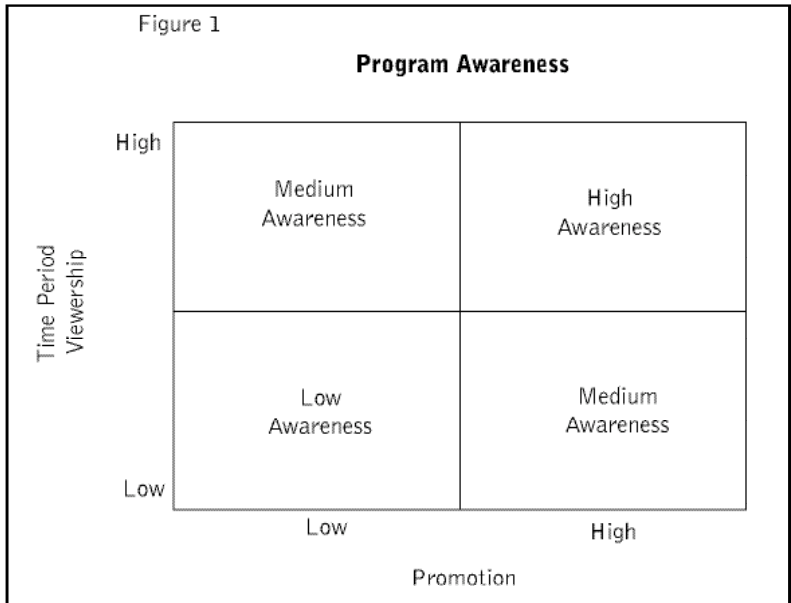
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existing viewers and to offer them an additional program that is in immediate line with their demonstrated interests.

Awareness

Awareness is a multifaceted concept, although for the purposes here, it is defined as the familiarity viewers have with a show. Before a show airs, awareness is purely a function of the effectiveness of promotional strategies employed in the marketing mix. However, after the show airs, it is also a function of the level of viewership in its time period. This relationship is roughly illustrated in Figure 1.

Awareness impacts scheduling/ placement strategy in influencing whether a targeted viewer will even consider watching the show. A viewer may not want to bother watching a new show because they “don’t know about it at all,” “don’t know what it is about,” “don’t know who’s in it,” or “haven’t heard anything about it.” In turn, understanding the levels of awareness for a particular show helps

sweater to a customer already in its store buying a pair of pants than to a customer at a Wal-Mart buying a pair of pants, so too can a network get a viewer watching one of its shows to watch another program (and/or the program after it) more easily than that

network can get someone watching a competitor to switch over. Also, as it makes sense for Macy’s to try to interest a pants buyer in perhaps buying a sweater too instead of, say, a large automobile, so too does it make sense for networks to understand their

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predict viewer interest and/or viewership, which in turn is also helpful in determining a program's optimal placement/scheduling strategy.

Identity

Perceived identity, as with awareness, is a multifaceted concept. Like a brand identity, different networks and/or time periods are "identified" by viewers as having specific types of offerings. In television, the identity of a network is equally influential and can even at times compensate for low awareness levels. For instance, many viewers may identify NBC as a hip/urban network, while they might see ABC as a more family-friendly/traditional network. Or, a specific time period, like the "post-*Friends*" time period Thursday nights on NBC may be identified as a time for a hip/urban comedy, while Friday nights on ABC during the heyday of its famed "TGIF" programming block could be seen as a time for a family-friendly/traditional comedy. Correspondingly, these identities might be extended to new shows in those time periods (or on those networks). In television terms, this might cause viewers to "check out what's on NBC," for example, specifically based on the network's identity and without regard to awareness of a specific program, to find programming suitable to

their interests. As such, understanding various time period and network identities is also critically important in determining a program's optimal placement/scheduling strategy.

Product

Along with promotion, great attention is put on the product/program in the marketing mix, often to the exclusion of well-designed pricing and/or placement strategies.

Certainly, creating television shows is a very complex process and deserves great attention, however if the other elements in the marketing mix are poorly matched, the caliber of the product (critical considerations notwithstanding) will not always correlate to its ultimate success or failure in marketing/dollar terms.

In other words, good shows don't always succeed because the critics say they are good and bad shows don't always fail because critics say they are bad. Nonetheless, product-driven thinking is prevalent, with creative changes to the program often being made before adjustments to other elements of the marketing mix are considered. Often, this creates stifling, even authoritarian, top-down production management bureaucracies, which, along with the historic chaos and instability of the marketplace, serve to make a very complex process

even more difficult and costly.

In fact, such micromanagement on the part of senior production executives often has unintended and undesirable effects, as decision-making autonomy is usurped from artists and technicians closest to the locus of control, allowing them less input into how their work is done, often discouraging the possibility of their engaging in more efficient behavior.

Everybody Loves Raymond

The quality of the program *Everybody Loves Raymond* is unquestioned. The talents of its star, Ray Romano; its executive producer, Phil Rosenthal; and its CBS network patron Leslie Moonves and his team are evident in the contribution the show has made to the pantheon of memorable television, and equally important, to the hundreds and hundreds of millions of dollars in pure profit the show generates annually for Viacom/CBS.

However, *Raymond* could have easily never survived its first season.

Back in 1996 when the show debuted, CBS was a network in crisis. The onetime "Tiffany network," following years of management turmoil, had lost its shine. It lagged behind NBC, ABC and, oftentimes - among the younger viewers coveted by advertisers - even Fox. Worse still, with its viewership in decline, polishing the badly tarnished CBS identity and attracting new viewers was proving very difficult. Amidst these challenges, CBS, led by its newly recruited president Leslie Moonves, built its fall 1996 lineup of programs around big, established stars like Bill Cosby, Don Johnson and *Cheers* alumni Ted Danson and Rhea Perlman, hoping their star power would help promote the network, improve its identity and set the stage for what would in fact become its eventual impressive turnaround. Also developed and introduced that year, however, was the lower-profile *Raymond*, starring a then unknown comic, Ray Romano.

Squeezed out by the new, high-profile shows for choice time periods, *Raymond* was forced to the less desirable Friday 8:30 p.m. slot, following the sitcom *Dave's World*, featuring for-

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mer *Night Court* star Harry Anderson. *Dave's World*, loosely based on the life of humorist Dave Barry, was never close to being a hit show, yet for beleaguered CBS it was good enough at the time. Hopes were a little higher though for *Everybody Loves Raymond*. Unfortunately, its initial performance was as inauspicious as *Dave's World* was mediocre. Although holding *Dave's World's* tepid viewership, *Raymond* struggled badly its first few months on the air, trailing its time-period competitors, NBC's *Unsolved Mysteries* and ABC's *Boy Meets World*. In short, the program was hardly demonstrating itself to be the enormous hit show that it would become.

Without an established star, airing in a time period with low viewership, *Everybody Loves Raymond's* greatest liability was that its awareness was very low. Further, this was unlikely to change. Introduced as one of many new fall shows, it had to share promotional resources with many other programs, almost all of which were higher priorities for CBS at the time. In turn, *Raymond's* prospects for viewer ratings growth seemed limited or, at best, stalled, as its viewership could not grow until its awareness grew, as viewers won't watch a show they don't know about anymore than a Macy's or Wal-Mart shopper will buy a product they aren't familiar with, absent a strong identity - something that neither *Everybody Loves Raymond* nor the CBS Friday night time period possessed.

By December of 1996, *Raymond* was on the bubble. Objectively, the show's ratings had been lousy for months and it was hard to determine if the program was in fact just another show with a mediocre draw or if it had growth potential were viewer awareness of it to increase.

Further inhibiting *Raymond's* potential growth was the fact that awareness itself also develops at different rates depending on the targeted viewing segment, sometimes making it take even longer to distinguish between a mediocre/failed show and a would-be hit show that takes time to find its audience.

Putting psychographic segments aside for the moment and looking at

the viewing populace by simpler, component demographic categories, the show's core intended audience, men (especially younger men) traditionally watch less television than other groups, as they generally are working long hours establishing their careers, dating or engaging in whatever other activity restricts their television viewing time. In turn, CBS' on-air promotion/advertising for the show was not as effective with them

in raising awareness since, watching less television, men were less likely to be exposed to it. Nor were men as likely to stumble upon the show in the course of watching television as, again, they didn't watch as much television. By contrast, women (especially older women), watch more television and are thus easier to promote to through television and/or are more likely to stumble upon a show in the course of watching television.



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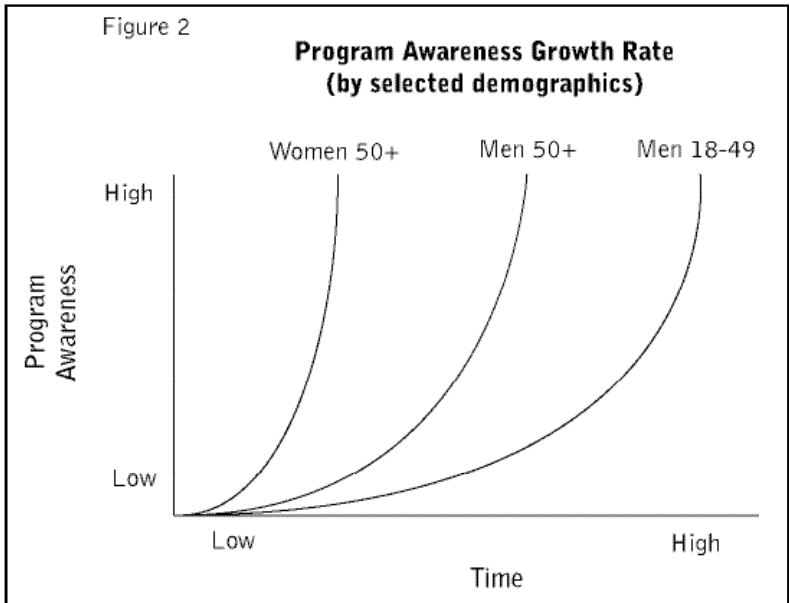
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Correspondingly, awareness rates among women grow more rapidly than men, especially young men, as shown in Figure 2.

Therefore, a network with low circulation among men, like CBS in 1996, was at an even greater disadvantage as it wasn't getting many males

“in the store” to view any shows. So it took even longer for awareness to grow among *Raymond's* viewers (especially men) and therefore it would take longer for the show to establish its true performance potential. Unfortunately, television executives are not known for their patience. In fact, shows like

Raymond that appeal to viewers (especially male viewers) who “take longer to reach” are less desirable to a big network in economic need of reaching a big audience quickly. As a result, such shows are less scheduler-friendly, often bouncing around a schedule and never reaching their full potential, or they are prematurely pulled from a schedule altogether, leading to a downward spiral of viewership amongst those hard-to-reach viewers (again, especially men).

With fewer existing shows of interest to them, it then becomes harder and harder to introduce new programs to them as they are watching less and less television, causing those new programs in turn to be pulled before they have a chance to succeed, leaving those viewers with even fewer reasons to watch television, and so on. (In fact, this concept could in part be responsible for the much-publicized decline of young male network television viewers in recent years.)

Concern about the show

Nonetheless, as stated above, CBS



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faced a dilemma concerning *Everybody Loves Raymond* in December 1996. Executives liked the show and, given that the program was also produced by the production company of comedy titan David Letterman, its creative reputation was mostly impeccable. Still, there was concern about the show, especially within the in-house CBS research department, the department responsible for forecasting network viewership (where this author was then employed).

As was and is still custom among all broadcast television networks, early in the process of choosing the new fall lineup, the CBS research department conducted focus group testing of prototypes/pilots for each new series under consideration. In that spring of 1996, *Raymond* initially tested well enough that, in combination with the prestigious involvement of David Letterman's production company and the experienced instincts of CBS' new programming team, the show squeaked onto the fall schedule.

However, after *Raymond* debuted to months of mediocre performance, the CBS research department, now acutely mindful of occasional negative results in its research that had suggested the show might not be as promising as had been hoped, decided to issue a memo, clearly emphasizing only these results (and to insulate itself from fallout in the event *Raymond* ultimately didn't succeed).

Circulated to senior CBS executives in December 1996, this "diagnostic analysis" memo covered "the negative comments that have surfaced regularly over time during all of the primary research," although it stated, "overall, focus group responses have been mixed." In effect, however, it suggested or at least implied that *Raymond* might be what it appeared to be: a mediocre show with limited growth potential and, low awareness levels notwithstanding, a program that could be canceled. In retrospect, of course, the research department was very wrong. Ignoring the psychographic properties of the television market, it was the data that was mediocre, not *Raymond*.

Though flawed, the CBS research methodology involved in testing the

show was (and still is) fairly standard in the multibillion-dollar television industry. Like all CBS programs, episodes of the show were shown to respondent groups of general television viewers, ages 25-54, at a commercial audience research facility. The resulting responses were then qualified, quantified and reported back to CBS executives.

Putting aside questions about the techniques and methodology involved

in that process, however, the critical error made by CBS research was, simply, polling the wrong people.

As was discussed earlier, age and gender are only some of the components that influence viewer psychological makeups/attitudes and, by extension, programming preferences. Other demographic factors such as income, education, presence of kids in the household, geographic region and Myers-Briggs psychological type play a

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large role in determining who the viewer is and, importantly, to what programming they will “pay” their attention. The CBS research department’s polling of simply general television viewers, ages 25-54, was the equivalent of Democratic pollsters quizzing voters 25-54 about presidential candidate preferences, without regard to other critical information like their party affiliation.

As illustrated in Figure 3, it was a methodology doomed to be inherently inaccurate, one that would very likely produce the resulting irregularities and negative reactions. In fact, given these methodological errors, it is almost a wonder that *Raymond* tested well enough to ever make the CBS fall 1996 lineup in the first place, perhaps a testimony to its sheer appeal. (One might also wonder about “what might have been” with other shows that have been rejected by the network research process, programs perhaps wrongly relegated to the dustbin of television history.)

Instead, CBS research should have

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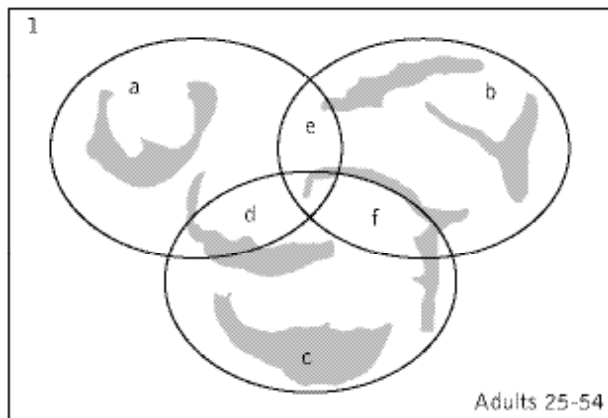
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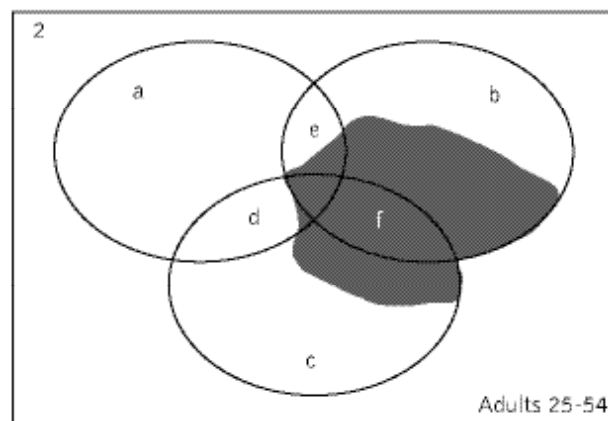
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Figure 3

Everybody Loves Raymond Respondents CBS Sample Versus Actual Viewers



■ CBS Research Respondents



■ Actual Intended Raymond Viewers

- [a] Fashion/Trend Conscious
- [b] Home & Hearth
- [c] Quality Watchers
- [d] Trend and Quality hybrid
- [e] Trend and Hearth hybrid
- [f] Quality and Hearth hybrid

polled mainly viewers who were in line with those *Raymond*’s creator/executive producer Phil Rosenthal intended to attract with his well-constructed, classic comedy. (Such respondents could have been screened based on existing behavior, i.e., sorted by viewership of similar existing shows.) The show was purposely not positioned to be hip, trendy or edgy – things which, as Rosenthal has said in published

reports, “are just not my values.”

Nonetheless, Fashion/Trend Conscious viewers were included in the general television viewers sample of CBS, resulting in numerous negative comments during the course of focus groups for the show. This in turn resulted in comments (which were referenced in CBS’ diagnostic analysis memo) indicating that respondents felt the show’s stories were “nothing fresh or new” and that stories needed to be

resolved in a “more original and up-to-date way.” Further negative comments from viewers who were purely Quality Watchers were equally misleading; some of those comments in the memo derided the show for not being enough “like *Seinfeld* or *Mad About You*.” Still other negative comments came from purely Home & Hearth viewers who were often confused over the show’s concept, unsure “whether or not *Raymond* is supposed to be a family show...or an adult-appeal relationship show...or an edgy, sophisticated comedy.” Again, these comments were drawn from a pool of respondents that didn’t necessarily include the viewers that the show’s producers intended to attract, making those remarks unpredictable of the show’s appeal to its real viewer base.

Still, *Everybody Loves Raymond* was at a crossroads and, with the circulation of the CBS research memo, CBS’ senior programming executives needed to make a decision on the future of the show.

Obviously, as is now known, they chose wisely to ignore the memo, moving the show out of its Friday night graveyard and into the more highly-viewed 8:30 p.m. Monday time period following *Cosby*, which featured American icon Bill Cosby. In turn, in the new time period, *Everybody Loves Raymond* received the awareness boost it needed to establish itself with viewers, becoming the classic television show and Viacom/CBS cash cow watched weekly by nearly 20 million viewers.

Beat the odds

Ultimately, with the support of CBS’ senior executives (chiefly Leslie Moonves and his scheduling guru Kelly Kahl), the story of *Everybody Loves Raymond* is one of a promising show, made by talented artists, that beat the odds to get on and remain on network television for nine years, becoming a genuine television classic. And, certainly, as the BCS rankings have shown in college football (and as USC fans can attest), the value of the human element can never be underestimated, a fact to which the riches *Raymond*

delivers to the Viacom/CBS bottom line heartily attest.

Still, the program’s uncertain early journey highlights many of the vicissitudes inherent in the conventions of marketing in the television business. Further, in this age of information where many other industries face equal marketing complexities, much progress needs to be made to ensure that customers are well served and that they are not in the future denied

Everybody Loves Raymond’s spiritual brethren, nor are their parent corporations denied the great revenues such properties can yield. In short, the tools and methods employed by managers in this age of information need to be made more precise, especially in the multibillion-dollar television industry, so as to ensure that executives can operate their organizations and serve their customers with ever greater reliability and profitability. | Q

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Ask the right questions

“Ask a stupid question, get a stupid answer.” “Garbage in, garbage out.” There are many old adages that apply to what can happen with data and information when the inputs and outcomes are less than optimal. The same goes for research queries, and even today, often much is left to be desired when it comes to questions and questionnaires in data gathering.

The desired outcomes in research depend on insight and analysis, but always begin with questions. Not just questions, but the right questions. Sometimes data is unattainable at the end of a research project simply because key inputs were eliminated due to time constraints, budget restrictions or were left out because of poor analytic planning. Not only can bad questions leave a client or company without valuable and much-needed data, poorly-worded questions can also bias outcomes. Bias is much worse, especially when it may not be readily apparent.

Michael Singletary of the University of Tennessee writes in *Mass Communications Research* that, “Questionnaires must be written to accomplish three objectives: comprehension, accuracy and completion.” There are a lot of things that can get in the way of achieving these three goals.

Before discussing some of the mistakes that are made when questionnaires are written, some background on why poorly-written questions enter into expensive research projects is in order.

- *Lack of preparation and proofing*

Many sets of eyes need to review a questionnaire prior to field. Everyone from the client to the chief analyst should review the questionnaire to determine that the necessary inputs are there and that the inputs are worded correctly. The client must ensure that all questions are entered to deliver desired outcomes while the analyst has to ensure necessary questions are included to get at all of the requested analysis. Certain advanced analytics require specific inputs and

without them optimum analysis cannot be performed.

- *Too many chiefs*

The old saying is applicable here. Oftentimes too many personnel are in the mix when it comes to a questionnaire’s design. If an advertising agency is involved, it could mean the client, the agency and the research



By Kyle Langley

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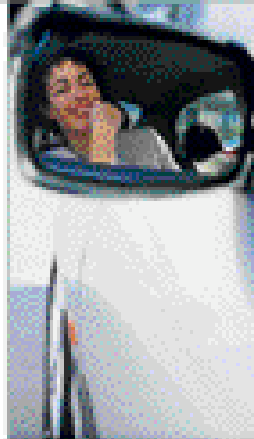
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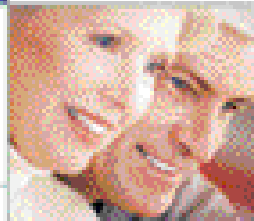


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company are all involved. And, many times changes are made for reasons not focused on sound research such as “because we can” or to justify someone’s position. To make it easier, a key, experienced researcher should be identified. This researcher has final authority to approve the questionnaire. During the evolution of the project all changes and additional inputs should be tracked and recorded.

- *Lack of experience*

Too often younger research associates are put in charge of questionnaire writing and preparation. While it’s not at all a bad idea to help them grow in their careers and knowledge, a junior researcher or account planner should never have the final say on questionnaire design and approval.

- *Rushing*

Many times research requires a fast turnaround – although not nearly as much in quantitative research. Quantitative projects are almost always longer in planning and preparation. Often at the end of budgetary years

there can be a last-minute rush to spend money so it is not lost. This is where problems can arise. Don’t rush. And beware of the other stumbling blocks mentioned here that can cause multiple problems. Research money is a much-valued commodity. Don’t blow the project because the process needed to be completed in a hurry.

- *Big egos*

Unfortunately, there are people in all businesses who change things only because they can. In the research business changes are often made to questionnaires with no methodological justification. Don’t be afraid to step in and make the right facts known on how a specifically-worded question will affect the overall plan. Hierarchy being what it is within companies, create a checks-and-balances system among client, agency and research vendor.

- *Leaving it all to the research company*

While your research vendor should know all of the intricacies to questionnaire development, leaving it all to them is a bad idea. While they may get

wording and methodological precision down, they usually have no idea of the exact outcomes that are of priority. Implement a well-coordinated effort to design a project questionnaire and identify the top goals and priorities and continually discuss them among all parties during the genesis of design and execution of a project.

- *Ulterior motives*

This should not be a problem in “regular” research, but it can be problematic with political research of any kind. Ulterior motives not only cover the macro idea of influencing the process to get the results YOU want but can also manifest themselves in more benign ways. Many of those ways are discussed in the next section.

Common mistakes

So, now you’ve got your team coordinated, your goals set and you know what you want to find out of the project. Easy, right? Well, it should be, but a lot of mistakes are made in the actual execution of the survey instrument. Some of the most common questionnaire mistakes involve the following:

- *Either/or questions*

The either/or query is just that. It asks respondents to identify some aspect of a question by giving them an either/or opportunity. While this may sound fine it often is not. For example and simplicity, asking a respondent if their favorite color is blue or green is not helpful and can skew data because the execution was biased from the start. Their favorite color may, in fact, be red. Political groups with a partisan agenda use this method many times. Example: “Would you describe Bill Clinton as an adulterer or a crook?” He may be neither or both, but an unsuspecting public may give unscrupulous or unknowing researchers inaccurate answers. More often than not it is just a poorly-written question, which leaves respondents with no way out. At first appearance of an either/or question, ask yourself if an open-ended question might be more appropriate.

- *Double-barreled questions*

Double-barreled questions also

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often leave the respondent with no way out. An example is “Do you think your boss is friendly and fair?” The boss may in fact be both, but he or she could be only one or the other or neither, which forces the respondent into an uncomfortable situation. To think that the two concepts are related in some way could be trouble. Singletary suggests that the question writer and reviewers should always put themselves in the place of the respondent as the survey instrument is designed and finalized. It goes without saying that all questionnaires should be tested for time, sequence and clarity before field operations commence. If you are doing cultural in-language research the questionnaire should also be back-translated with native speakers to make sure nuances and translations are clear and correct.

- *Future intent/usage questions*

Some future intent questions are workable, such as “What is the like-

hood you will purchase a new car in the next 12 months?” But often, companies seeking more precise measures of profit potential seek to answer questions that can skew data and make it unbelievable. For example, a question that may be a stretch is, “How much do think you will spend on men’s underwear in the next 12 months?” Does anyone really know the answer to this question? In our experience, even among those who think they know, big differences exist among cultural segments, with some tending to exaggerate on future purchase intent. A way to get a more potentially accurate answer is to base future numbers on past 12-month purchases within certain vertical product segments. With consumer products and goods, purchase cycles are more often and consistent than with large purchases such as houses and cars. One would hope that, on average, underwear purchases are happening far more often and consistently than new car purchases. Deeply delving into future purchase intent can

be a slippery slope so navigate with caution and be clear and conservative on financial potential.

- *Scales usage questions*

Scales are a valuable part of research but should be designed with expertise and never overused. It is well known that different cultural segments use and understand scales in different ways. Hispanics tend to over-rate while some Anglos and Europeans will give only average scores for something they rate highly. While this is better left to an entire essay on understanding scales usage among cultural segments, it has clearly been supported that using varying scales, 1-10, 1-7 and 1-5 along with rotation of inputs, will keep respondents from getting overloaded and simply falling into a pattern of responses. Something known as minimum response options is also a part of this equation. Never overload with response options which may cause the respondent to tune out. When using agreement scales try to keep it to no



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more than four or five options – excellent, good, fair, bad – or, very much agree, somewhat agree, disagree, very much disagree, no opinion.

• *Hypothetical questions*

Hypothetical questions are just that: hypothetical. While these questions are often used in research, using their results to build business models and make business decisions can be problematic. Why? Attitudes do not always match behaviors. An example would be to ask respondents “If car maker X offered a six-door pickup truck would you be likely to buy one?” Even lacking information on the vehicle’s appearance or cost, if the respondent is a fan of carmaker X or a pickup truck owner they may say yes, but would never have any intent to purchase the vehicle in question once they saw it. Getting accurate research answers can be done in better ways than using hypothetical situations in quantitative research (i.e., qualitative research).

• *Negatively-phrased / double-negative questions*

One might be surprised that so many negatively-worded questions are included in questionnaires. “Would it not be fair to say this is untrue?” If you had stop and think about that question imagine being on the phone and having to think something like that through. Imagine how such questions can take up valuable time in questionnaire completion. Converse and Presser (1986) identified many words and phrases that can wreak havoc by using what they call implicit negatives. Implicit negatives are words and phrases that seem to have meaning beyond their face value. Be careful with using negatives and don’t assume that a mirror positive version is a true opposite. Stay away from negative words like “not,” “forbid” and the like.

• *Leading questions*

This example is seen more often in partisan political research. Setting the respondent up with leading information in advance of the question is bad research. “The media has really been down on George Bush because of Iraq. Would you agree he is not doing

a good job on Iraq policy?” If you don’t believe such questions are asked, simply read the inputs into many of the political polls that are published in print and online. The reputable political research companies usually avoid such bias, but it occasionally can be seen in consumer research as well. Don’t lead. Just ask a simple straightforward question.

Accomplish the goals

While there are many more examples, the above-mentioned are the most common areas where bad questionnaire design and execution can cause trouble during the research process. One thing to keep in mind is: keep it simple. It may sound cliché, but it is true. Keep it simple and apply the ideas and concepts discussed in this article. By doing so, one can accomplish the goals of comprehension, accuracy and completion. This in turn produces quality data for the creation of valuable analytics. Success at comprehension, accuracy and completion almost always equals happy agencies and happy clients. | Q

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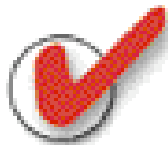
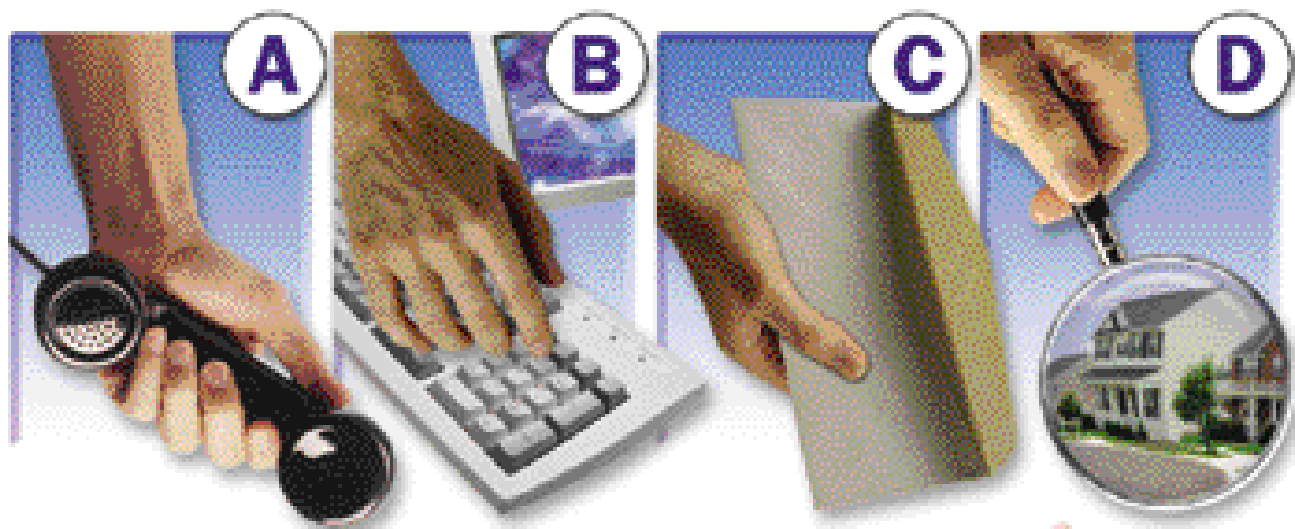
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The answer is:



ALL of the above.



The research data collection world grows more complicated every day thru technology, legislation and changing concerns about privacy. Anti-spam, Do-Not-Call, wireless phone rules, anti-tax laws, abandonment rates, virus concerns and the like now fill the researcher's "worry list" just as much as representation, projectability and bias. All too often, researchers are presented an "answer" which has more to do with a vendor's business model than it does their research challenge.

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Survey Monitor

continued from page 12

Nielsen//NetRatings.

Nielsen//NetRatings found that men and women living in high-income households shared similarities in their preferences for travel sites. In terms of differences, men visited more financial sites while women were drawn more to entertainment sites.

The top Web sites capturing the largest percentage of men in this income group were Fidelity Investments, Sabre Travel Network, CBS MarketWatch, United Airlines and American Airlines. The top Web sites drawing the highest percentage of high-income women were AOL Travel, Moviefone, AOL Living, Expedia and AOL Entertainment.

“Our research indicates that savvy

advertisers trying to reach both men and women efficiently in this group should target online travel sites in their marketing campaigns, while focusing on financial sites to reach men and entertainment destinations to reach women,” says Dougherty. For more information visit <http://nielsen.netratings.com>.

I want my satellite radio

Columbus, Ohio-based BIGresearch reports that 18-34-year-olds are satellite radio providers' No. 1 age group for current subscribers and also for those planning on buying in the next six months.

For those 35+, the majority say they don't plan on buying/subscribing to satellite radio at this time. These age groups also tend to be less likely to be

current subscribers, according to the findings from the company's March Consumer Intentions and Actions survey of over 7,000 consumers. The satellite radio questions were developed in collaboration with MarketStar.

Education about the advantages or useful outcomes of subscribing to satellite radio appear to be necessary in order to motivate the 35+ crowd to subscribe as 22.7 percent of the 35-44-year-olds said they didn't know enough about the service, 24.3 percent of the 45-54-year-olds, 2.8 percent of the 55-64-year-olds and 42 percent of the 65+ said the same. “Lack of understanding of the benefits and technological anxiety are the key hurdles that the satellite radio vendors need to overcome at this stage, especially for sub-segments including older consumers,” says Ryan Brock, vice president of strategic services with MarketStar Corporation. “In the retail environment, this underscores the need to target these consumer segments where they are most likely to shop, with hands-on, face-to-face educational tools to overcome these specific objections.”

Of consumers 18+, 4.2 percent said they currently subscribe to one of the satellite radio services and 2.5 percent said they are planning to within the next six months. An additional 16.1 percent said they plan to subscribe someday.

Of those people who said they plan to subscribe, 28.7 percent said they would subscribe to Sirius, 16.7 percent said XM and 54.6 percent were undecided about which service they would choose. XM was the No. 1 pick for 18-24-year-olds and Sirius was No. 1 for all other age groups. For more information visit www.bigresearch.com.

Trendsetters read, they don't watch TV

Print media, in general, are more effective than television for reaching influential Americans - the 10 percent of the population who drive what the other 90 percent think, do and buy. By incorporating its Influentials research battery into Mediamark Research

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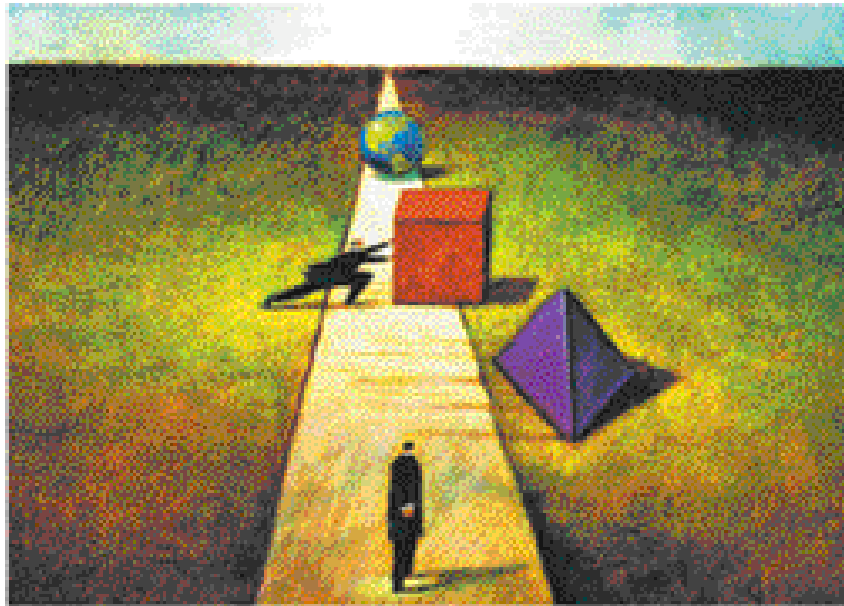
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Inc.'s Survey of the American Consumer, NOP World found that 41 percent of influential Americans are among the nation's most avid newspaper readers, and a third of influential Americans are counted among the country's heaviest magazine readers. In contrast, just 14 percent of influential Americans are heavy TV viewers.

Radio is somewhat more effective than TV for reaching influential Americans, with 20 percent of Influentials among the most frequent radio listeners. The print media, however, provide a far more efficient way to reach influential Americans than either major broadcast vehicle.

"We know that these consumers are the principal drivers of word-of-mouth conversations across a diverse range of categories, including cars, technology, food, beverages, media, home decorating and financial investments," says Ed Keller, CEO of NOP World Consumer and the author with Jon Berry of *The Influentials*, a book published by Simon & Shuster in 2002.

Demographically, Influentials are similar to the average citizen. They are found in almost all regions, and in both rural and urban areas. They are about twice as likely as the general population, however, to be college graduates, as well as to hold professional or management jobs.

"Although Influentials are similar to the general public demographically, they stand apart in their level of participation in their communities," says Keller. "They are more likely, for instance, to attend public meetings or to give speeches or talks. In addition, in the U.S., they are twice as likely to recommend a product - one of the reasons they are such key targets for companies looking to build the word-of-mouth momentum critical for market success." For more information visit www.nopworld.com.

Houston and L.A. among top markets for potential new auto buyers

An analysis from Scarborough Research, New York, finds that Houston is the top U.S. local market

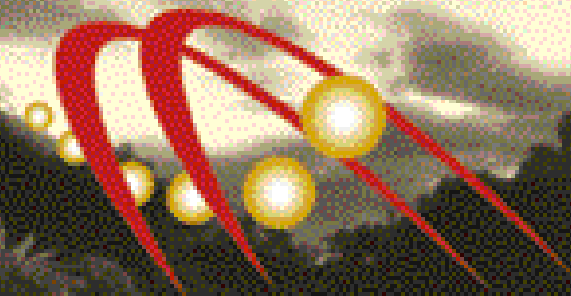
for potential new auto buyers. (Potential new auto buyers = consumers who indicate in the Scarborough study that they or a member of their household intends to purchase a new vehicle during the next 12 months.) Sixteen percent of consumers in Houston reported that they or another member of their household plan to purchase a new vehicle during the next 12 months. Los Angeles, San Antonio, Miami and New Orleans round out the top local markets for potential new auto buyers, with 15 percent of consumers in these markets planning to buy a new vehicle during the next year.

On average, potential new auto buyers plan to spend more than \$24,800 on new car purchases for their household during the next year. They are 15 percent more likely than all consumers to have four or more people in their household, and they are 37 percent more likely to have traveled 2,000 or more miles during the past month.

Grand Rapids, Mich. (4 percent), Greenville, S.C. (6 percent) and Columbus, Ohio (7 percent) rank last among Scarborough's 75 markets for potential new auto buyers. The full list of markets is included in a press release that can be found at www.scarborough.com.

Age and gender are major influences on charitable donations

The Customer Focus 2005: Nonprofit study by Baltimore, Md.-based marketing firm Vertis shows that 25 percent of men with a household income of \$75,000+ contributed to a political organization in 2005, compared to 14 percent in 2001. In addition, 48 percent of women with a household income of \$75,000+ donated money to a food/hunger charity in 2005, compared to 40 percent in 2001. "Men and women have demonstrated different donation patterns that also translate across various generations," says Thérèse Mulvey, vice president, marketing research, at Vertis. "This data illustrates the importance for organizations to understand donors and their behavior in order to develop a cam-



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paign that speaks directly to contributors and effectively secures their support.”

The study also found that adults are more likely to make a donation to an organization following catastrophic events or natural disasters. In 2002, following the events of 9/11, 49 percent of adults with some college education donated money to a safety/disaster relief organization, compared to 36 percent in 2005.

Fifty-four percent of Generation Y (1977-1994) adults contributed between \$1-\$99 to charities and non-profit organizations in 2005, compared to 48 percent in 2001. Similarly, Generation X (1965-1976) adults increased their \$1-\$99 contributions from 36 percent in 2001 to 43 percent in 2005. Of the older Baby Boomers (1946-1955) surveyed, 23 percent donated \$100-\$249 to a local charity or organization in 2005, compared to 18 percent in 2001. Thirteen percent of what Vertis calls Young/Olds (1930-1945) donated between \$250-\$499 in 2005, compared to 9 percent in 2001.

Which charities are getting the donations? Twenty percent of male contributors donated to political organizations, compared to 10 percent in 2001. Of the Baby Boomers surveyed, 41 percent said they contributed to homeless/shelter organizations, compared to 32 percent in 2001. Of the female contributors surveyed, 43 percent reported they contributed to food/hunger organizations, compared to 36 percent in 2001. Thirty-six percent of female contributors donated to safety/disaster organizations, compared to 30 percent in 2001.

When deciding which organizations to support, 58 percent of contributors who donated \$500+ and 52 percent of contributors who donated under \$250 stated that it is very important for them to know how the organization spends donated funds. Twenty-three percent of contributors who donated \$500+ stated it is very important to receive a summary of the progress made by the organization during the past year. Thirty-five percent of total contributors surveyed said it is very

important to receive information on why donations are needed prior to making a contribution. Thirty-eight percent of contributors surveyed said it is very important for them to obtain information on how the charity is helping a local area when deciding to which organization they will contribute.

Charitable solicitations elicit various responses. Forty-six percent of Generation Y adults responded to charitable solicitations from special events in 2005, compared to 38 percent in 2003. Similarly, 53 percent of Generation X adults also responded to charitable solicitations from special events in 2005, which increased from 47 percent in 2003. Over half (56 percent) of Young/Olds and 50 percent of Baby Boomers responded to direct mail solicitations from charities. Forty-nine percent of Generation X adults responded to charitable solicitations from friends or relatives, compared to 44 percent of Baby Boomers. For more information visit www.vertis-inc.com.

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Product and Service Update

continued from page 16

households. Panelists record UPC purchases made at any retail outlet using in-home scanners and then upload the information to ACNielsen for analysis.

The Homescan African-American Consumer Panel is a subset of the ACNielsen Homescan consumer panel. The national panel is being expanded from 91,500 households to 125,000 households by the end of 2005. For more information visit www.acnielsen.com.

TNS, Mediaguide team to track advertising

Beginning June 1, 2005, TNS Media Intelligence, New York, will begin tracking advertising occurrences on local radio stations in 30 top markets across the United States through a partnership with Mediaguide, Berwyn, Pa. Initially, TNS Media Intelligence will monitor 15 stations per market, both AM and FM, with additional stations being added on a regular basis. Tracking of ads will be done 24 hours a day, seven days a week and all recorded advertisements will be monitored. Mediaguide uses digital fingerprinting technology to monitor nearly 2,500 terrestrial radio stations in almost 200 U.S. markets.

For more information visit www.tns-global.com.

ACNielsen launches Shopper Trends

ACNielsen has launched Shopper Trends, its retailer equity measurement service. Shopper Trends, available across 23 U.S. markets, allows grocery and supercenter retailers to assess the impact of shopper attitudes on their brand equity, on the loyalty of their shoppers and on actual sales.

Shopper Trends uses an online survey methodology that asks shoppers for their opinions about a range of factors that go into brand equity, as determined by Winning Brands, ACNielsen's brand equity model. This attitudinal research, which allows ACNielsen to create a "store equity index," is then linked to information about actual consumer shopping behavior from the ACNielsen Homescan consumer panel to determine the impact of the store's brand equity on actual sales. For more information visit www.acnielsen.com.

New app for mobile data collection

Australia-based software firm Myoporum has introduced a new Web application called Mobile Data Collector which allows users to create Web-based data collection forms that

can be completed by users with Internet-enabled mobile devices such as a BlackBerry, Palm or iPaq PDA, or Internet-enabled mobile phone. Once the data collection form is configured via a Web browser, the output is automatically configured to meet the needs of the mobile device connecting to it during data collection. For more information visit www.mobiledatcollector.com.

Report examines influences on consumer decision-making

Knowledge Networks, Menlo Park, Calif., has released *Consumers in Transition*, a 270-page report - available in book or CD-ROM format - combining articles and over 100 pages of charts focusing on the major themes influencing consumer decision-making.

Consumers in Transition is a joint product of Knowledge Networks and Kaagan Research. The report is based on four studies conducted from 1992 to the present, focusing on topics such as: the growing influence of religion in secular decisions; the increasing fluidity of adult life stages once considered immutable; the acceleration of childhood in the 21st century; the reinvention of gender roles and family values; and the continuing power of the American Dream.

Consumers in Transition includes: 12 analytical articles; complete answers to the 2004 Sextant survey of consumer attitudes; charts showing trends in answers to the Sextant survey; and charts analyzing the Sextant data by societal "tribe." For more information visit www.knowledgenetworks.com.

Experian product links with Simmons data

Costa Mesa, Calif., information firm Experian has launched Addressable BehaviorGraphics, a system that unites client data, such as existing primary research, branding studies and customer lists, with Simmons syndicated consumer information and Experian household-level data to provide a customer view that bridges mass, direct and addressable media.

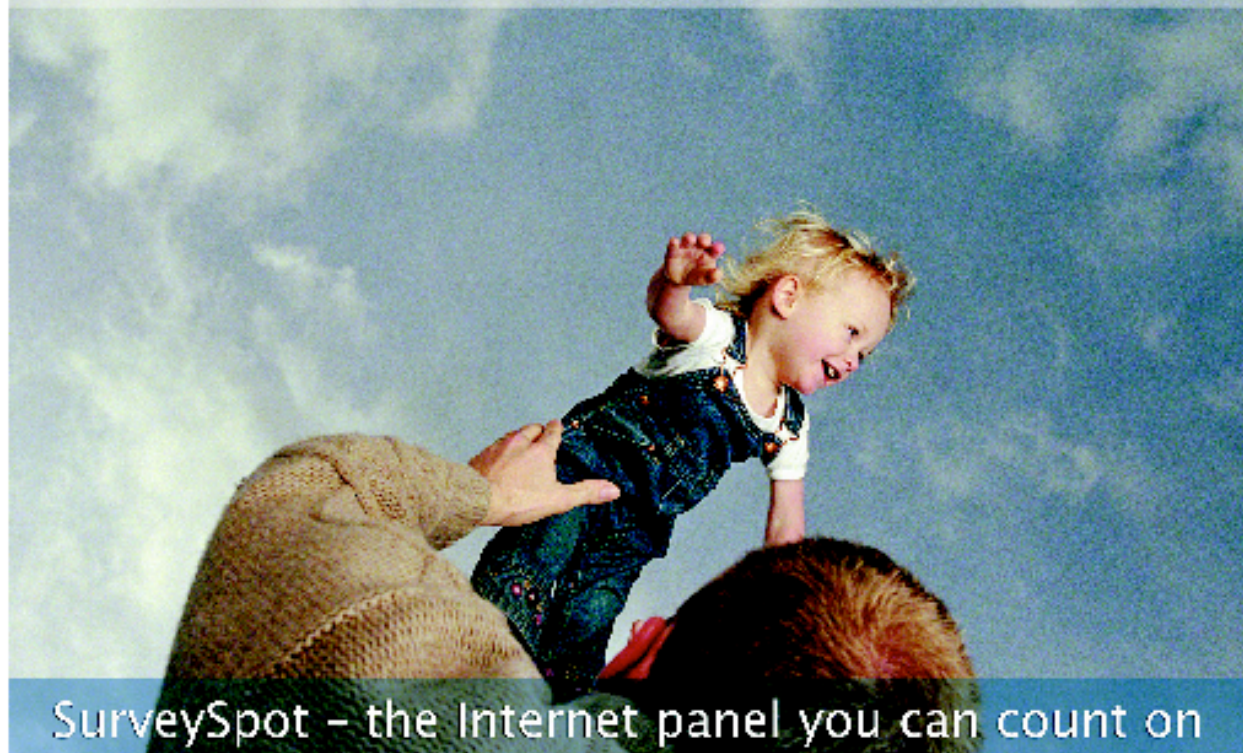
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Track news impact on pharma firms

East Hanover, N.J.-based NOP World Health and Roper Public Affairs have introduced Pharma NewsFlow, a new research program that tracks the impact of recent news stories on the reputation of the pharmaceutical industry, as well as of specific companies and thera-

peutic categories. Pharma NewsFlow provides a yardstick for measuring the effects of press coverage on the attitudes and behaviors of health care stakeholders such as physicians, consumers and managed care pharmacy and medical directors over time. For more information visit www.nop-world.com.

New scan-based c-store service from IRI

Information Resources, Inc., Chicago, and eRevolution, a provider of POS scanning technology, have announced a strategic relationship to provide a scan-based sales tracking service for the convenience store channel. The two companies will implement eRevolution's scanning technology at participating convenience retailers to provide sales information across an expanded sample for IRI's InfoScan Convenience Store Tracking Service. The initial rollout of the service calls for adding a minimum of 2,000 scanning stores to IRI's existing service. IRI will provide more granular insight into the convenience channel on a weekly basis, covering all available categories. For more information visit www.infores.com.

Firms team to conduct medical focus groups

A partnership between Estco Medical,

a Bethesda, Md., marketing firm, and Rocon Analysis, an Irvine, Calif., market research firm, allows Estco clients access to Rocon's proprietary group of 12,000 cooperating physicians across all specialties for research purposes. The partnership also incorporates Rocon's market research studies with Estco's Medigent Imprint software, which replicates real-world focus groups and in-depth interview settings. Imprint features reports and transcripts generated in real-time, group moderators and secure login areas. Rocon designs and develops customized questionnaires to obtain the information needed by the client. Rocon uses Imprint's online technology to implement the collection and tabulation of the data and then provides outcome analysis. For more information visit www.medicalfocus-groups.com.

Arbitron offers custom research for broadcast sporting events

Arbitron Inc., New York, is offering a new custom research service designed to enhance audience estimates for local radio listening to sporting events. The customized sports studies will deliver pre-, post- and in-game average-quarter-hour and cume ratings. Combined with Arbitron's local market ratings service, the studies will present a measurement of the broadcast audience to sporting events.

The telephone-based survey will be conducted the day after the radio broadcast of the selected event or series of events. Interviewers will ask about radio listening during a pre-determined daypart which will include the pre-game, game and post-game broadcasts. All survey participants will be age 18 and older. Additional options will be available to clients including: the listening location and listening frequency and consumer impressions of the sports broadcast. For more information visit www.arbitron.com.

New products from ESRI

Redlands, Calif.-based ESRI is now shipping PLTS for ArcGIS 9 Defense Solution. Defense Solution provides

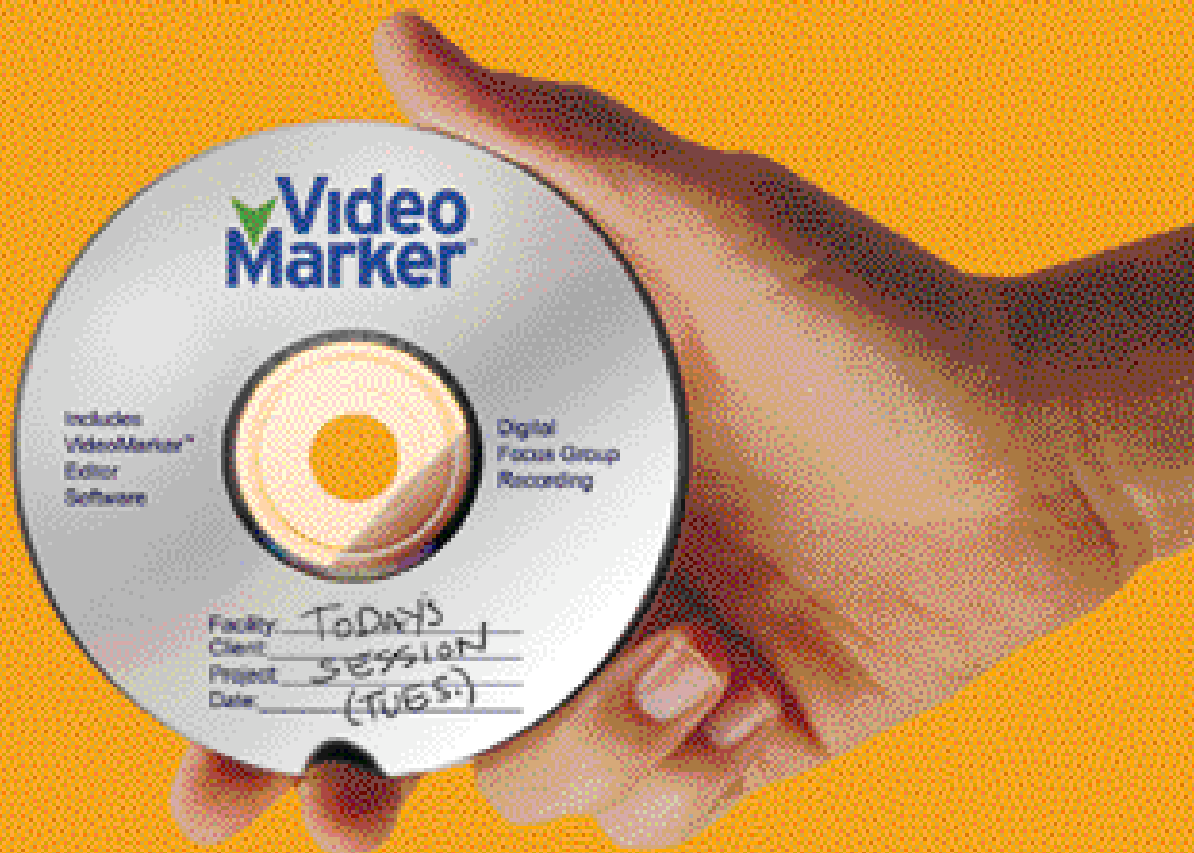
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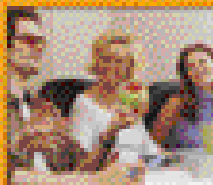
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tools to reduce cost and improve the efficiency of creating and maintaining topographic databases for publishing professional map products and data analysis. PLTS for ArcGIS leverages the object-relational ArcGIS technology to streamline production in a consistent process.

Defense Solution allows for creation and updating of many products including Foundation Feature Data (FFD), Vector Map Level 1 (VMap 1), 1:250,000 scale Joint Operation Graphic-Air (JOG-A), Vector Map Level 2 (VMap 2), and 1:50,000/1:100,000 Topographic Line Map (TLM) products. Other defense data models and products are also available with Defense Solution and can be customized to meet user requirements. For more information visit www.esri.com/plts.

ESRI has also released MapObjects-Java Edition Version 2.1, a collection of pure Java client and server-side components used to build custom, cross-platform mapping and

GIS applications. Software developers can use the components for development or take advantage of the programming interface for fine-grained control.

Resulting applications will perform a variety of spatial-based query and display functions at the presentation, Web, and server tiers, depending on user requirements. Other new features include support for digital terrain elevation data (DTED) raster image data; improved layout and printing capabilities; performance improvements when browsing image directories or loading images; support for nautical miles as a unit for map scale bar and measurement tools; and numerous bug fixes. For more information visit www.esri.com/software/mojava/index.html.

Briefly

Norway-based FIRM is now offering Confirmit CAPI, a computer-aided personal interviewing module that will enable companies to manage survey authoring and reporting activities

via a single application. For more information visit www.confirmit.com.

Millennium Research Inc., Apple Valley, Minn., has introduced Loyal for Life, a proprietary market research methodology that allows companies and product lines to analyze and quantify customer loyalty. For more information visit www.millenniumresearchinc.com.

Nashville-based 20/20 Research is now offering Japanese language support for its Qualboard online bulletin board application. Qualboard research studies can now be launched in English, German, Spanish, French and Japanese. For more information visit www.2020research.com.

European Web portal Ciao has launched a new proprietary online panel, Access: Poland, which currently features 25,000 members. For more information visit www.ciao-ag.com.



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Philadelphia: Focus Concepts & Focus, Inc.
800.211.3008

Phoenix: Focus Market Research, Inc.
480.844.2774

Pittsburgh: Performance Plus
508.877.1787

San Antonio: Industry Research
713.734.4364

San Diego: Delta Research, Inc.
619.299.4268

San Francisco: Market Research, Inc.
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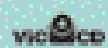
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San Jose: Market Research, Inc.
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Seattle: Consumer Opinion Services, Inc.
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Washington, D.C.: Strategic Research, Inc.
202.454.8770



Research Industry News

continued from page 18

The leader of the new product development area is yet to be announced.

Regal CineMedia, the media subsidiary of Regal Entertainment Group, will participate with **Arbitron Inc.**, New York, in a planned demonstration of its Portable People Meter (PPM) ratings service in Houston, beginning mid-2005. Regal CineMedia will use Arbitron-supplied PPM encoders to embed unique identification codes in *The Twenty*, an original short-form, entertainment pre-feature program, which includes national advertising. In Houston, *The Twenty* is available on 46 screens in two theatres. When an Arbitron PPM Houston survey participant watches *The Twenty* in any of those movie auditoriums, the Portable People Meter will detect the Arbitron-embedded codes and report that the individual has been exposed to the Regal CineMedia in-theatre programming. "The PPM system could measure the cinema audience with the same sample of consumers and the same methodology as radio, broadcast television and cable," says Pierre Bouvard, president, Portable People Meters, Arbitron Inc. "That means cinema advertising could be integrated into the media plan using common audience metrics. At the same time, radio, broadcast TV and cable would have a direct measure of their ability to fill the seats at the local multiplex."

Acquisitions/transactions The McGraw-Hill Companies,

New York, has completed its acquisition of **J.D. Power and Associates**, a Westlake Village, Calif., research firm. Terms were not disclosed. Founder J.D. Power III will remain actively involved in the strategic direction of the operation, and Stephen Goodall will continue to serve as J.D. Power and Associates president, with responsibility for day-to-day operations. The company, which includes the Power Information Network, LLC, has 787 employees, operates globally in 12 locations and will maintain its California headquarters as well as its other regional offices.

Harris Interactive, Rochester, N.Y., has added Turkey-based **TRIA International Research and Consultancy** and **ESTIME**, a full-service market research company in Venezuela, to its Global Network.

Paris-based **Ipsos** has acquired Chinese market research company **Guangdong General Marketing Research Company Ltd.** (GDMR). Founded in 1995 by Simon Tian, the company general manager and majority shareholder, GDMR will become part of Ipsos China. With 125 full-time employees principally based in Guangzhou (and also in Beijing, Shanghai and Chengdu), the company generated revenues of EUR 2.3 million in 2004.

Millward Brown New Zealand has agreed to merge with **Colmar Brunton**, a New Zealand research agency. The merged company, which will continue to operate as Colmar

Brunton and will be a member of the Millward Brown network, will be based in Colmar Brunton's Auckland office, with an office in Wellington. The merged company will employ around 80 full-time people, with around 500 part-time and casual staff. Colmar Brunton's unaudited revenues for the year ended December 31, 2004 were \$12.7 million, with net assets of \$1.3 million as of that date. Millward Brown New Zealand's revenues as of December 31, 2004 were \$2.4 million, with net assets of \$0.9 million at that date.

New York research firm **FIND/SVP, Inc.**, has signed agreements to acquire two business and market research companies, **Atlantic Research & Consulting, Inc.**, and **Signia Partners, Inc.** Boston-based Atlantic Research & Consulting, Inc., focuses on the financial services, management consulting, health care and public sectors. Established in 1985 by Peter Hooper, the firm had 2004 revenues of \$5.8 million. Signia Partners, Inc., headquartered just outside of Washington, D.C., specializes in the financial services, health care and consumer sectors. Founded in 1984, Signia Partners was acquired by its current CEO, Douglas House, in 1992. In 2004, Signia Partners achieved revenues of \$4.4 million. Terms of the transactions include an initial total payment of \$7 million in cash and \$800,000 in common stock, plus a three-year contingent earn out.

San Antonio, Texas-based marketing and research firm **Harte-Hanks, Inc.**, has acquired longstanding Australian partner **Communiqué Direct** pursuant to its option to purchase Communiqué Direct that Harte-Hanks acquired in June 2003. Financial terms were not disclosed. Founded in 1992, Communiqué Direct is a privately held firm that provides marketing and information services for the business-to-business sector across the Asia-Pacific region.

Phoenix Marketing International, Rhinebeck, N.Y., has acquired **Cultural Access Group**, a

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Los Angeles research firm. Raul Lopez has joined Phoenix, continuing as president of Cultural Access Group. Cultural Access Group will be a part of the Phoenix Consumer Insights Group, managed by President Tom Payne. Cultural Access Group will retain its offices in Miami, Los Angeles, Chicago and New York.

Separately, the Consumer Insights Group also acquired **Juice Market Research**, which specializes in African-American research and consulting.

Synovate has acquired **Aztec Information Systems**, an Australia scanner data services firm. Separately, it has also acquired Columbus Quanti, a Belgium-based research business. Columbus Quanti will be integrated with Synovate's existing research businesses, including all local and international business conducted through the Belgian office of Synovate and Synovate Censydiam. Hans Raemdonck has been named managing director of the enlarged Synovate Belgium business and Jan Callebaut has been named chairman of that business, alongside his global role as CEO of the Synovate Censydiam research practice.

Alliances/strategic partnerships

Millward Brown has appointed Romanian research company **Daedalus Consulting** as its licensee in Romania, expanding Millward Brown's presence in Central and Eastern Europe.

Research firm **Synovate Healthcare** has reached agreement to license longitudinal oncology data from **IMPAC Medical Systems**, a provider of electronic medical record software for oncology communities. Under the agreement, IMPAC will provide Synovate Healthcare with de-identified patient data from electronic medical records completed by clinicians and its National Oncology Database.

Herndon, Va.-based **WebSurveyor Corporation** has partnered with **Internet Retailer** (IR) magazine to launch a monthly program that will survey IR's readers on current issues and provide analysis about trends in the online retail industry. **Internet Retailer** will incorporate WebSurveyor into its new E-Retail Survey Reports, which will be published each month in the magazine as well as in its e-mail newsletter, IRNewsLink.

Nielsen Media Research International and the **AGB Group** have successfully closed their joint venture deal. The agreement to form a new joint venture was previously announced on August 5, 2004. Under the AGB Nielsen Media Research brand name, the 50/50 joint venture offers television ratings in more than 30 countries, as the deal merges the television audience measurement services of WPP-owned AGB Group with those of Nielsen Media Research International. The TV ratings services offered by Nielsen in the United States are not part of the transaction.

Association/organization news

"Becoming Cultural Architects: How to Drive the Influence of Research on Company Culture," by Hilary Perkins and Paul Buckley, Allied Domecq Spirits & Wine, U.K., was the winner of **ESOMAR's** John and Mary Goodyear Award for best international research paper presented at an ESO-MAR event in 2004. The award carries a prize of EUR 3,500 and is sponsored by TNS. The paper was selected for its wide application potential to other categories and for its relevance to global marketing.

The Web Analytics Association (WAA) has been founded to promote and unite the Web analytics industry. The mission of the not-for-profit organization is to foster the interests of end-users, vendors, consultants and educators involved in measuring the success of their online business initiatives. Founding corporate members of the WAA include Coremetrics, IBM, Nedstat, Omniture, Visual Sciences, WebSideStory and WebTrends. Premiere corporate members to date include ClickTracks, Harvest Solutions, HP, Site Intelligence and ZAAZ. The founding members of the WAA board of directors are: chairman - Bryan Eisenberg, co-founder, Future Now, Inc.; president - Jim Sterne, president, Target Marketing; vice president - Seth Romanow, director, worldwide customer knowledge management and analytics, Hewlett-Packard Company. For more information visit www.web-analyticsassociation.org.

Awards/rankings

The 2005 Service Industry Advertising Awards Committee presented Carefree, Ariz.-based name development firm **NameQuest** with a Professional Services Website Merit Award based on execution, style, creativity, quality, appeal and overall breakthrough content.

New accounts/projects

The state of Minnesota has selected **Davidson-Peterson Associates** (DPA) to estimate the economic impact of tourism on the state, as well



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as to provide a profile of travelers. Currently, the state has contracted for a single four-season study that straddles the 2005 and 2006 calendar years. It is likely that Davidson-Peterson Associates will repeat this program during 2007 and again in 2009. DPA is the travel and tourism division of Digital Research, Inc., Kennebunk, Maine.

20/20 Research, Inc., Nashville, has added market research firms **MarketWise** and **Kathryn Coriell Market Research** to its list of online software subscribers. Both firms will use 20/20's Qualboard application for client research projects.

Informa Research Services, Inc., Calabasas, Calif., will provide Metro Mortgage Guide with a real-time feed of mortgage lending product data for its www.rateupdate.com site. Under the agreement, Informa Research Services will create and host a turnkey portal solution for Metro Mortgage Guide with live rate and product information on mortgage loans, less-than-perfect-credit loans, home equity loans, and home equity lines of credit.

Separately, Informa Research Services announced an agreement to provide The Motley Fool, Inc., with a real-time mortgage and home equity loan search feed for its www.fool.com site.

U.K.-based research firm **ESA** has been appointed by Warwick Castle to conduct a program of customer interviews for the seventh consecutive year. The research will run for the duration

of 2005 and provide insight on the opinions and satisfaction of visitors to the popular tourist attraction.

New companies/new divisions/relocations/expansions

Research firm **NOP World** has opened a Roper Public Affairs regional office located in downtown Washington, D.C., at 601 13th St., N.W. The office will be led by Annie Weber, senior vice president, Roper Public Affairs.

Eve Zukergood has opened a new research firm, **InTouch Resource Group Inc.** Phone 845-357-5205. Fax 800-349-6849. E-mail elz@intouchrg.com.

Susan Rogers has opened a new research firm, **Rogers International** in the U.K. at 1st Floor, Well House, Buckland, Aylesbury, Buckinghamshire, HP22 5HY. Phone 01296 630680. E-mail susan@rogers-international.com.

A new research firm, **Marketing Data Management Associates, Ltd.**, has opened in Snellville, Ga. Company president Leonard Murphy can be reached at 866-545-3216 or at lmurphy@mdm-associates.com.

A new **Millward Brown** office has opened in Beijing. It will be managed by Praveen Rammachandra, previously based at the Shanghai office.

Company earnings reports
Opinion Research Corporation, Princeton, N.J., announced financial

results for the fourth quarter and year ended December 31, 2004. Net income totaled \$2.4 million, or \$0.38 per diluted share, in 2004 versus a net loss of (\$8.9 million), or (\$1.47) per diluted share, in 2003. Net income in 2003 was impacted by \$11.5 million, net of tax benefits, for a goodwill impairment charge.

Revenues for the fourth quarter were \$49.3 million versus \$46.0 million in the prior year's fourth quarter. Social research revenues were \$32.3 million versus \$28.5 million in last year's fourth quarter. Market research revenues totaled \$14.4 million versus \$13.2 million in the prior year's fourth quarter. Teleservices revenues were \$2.6 million versus \$4.4 million in last year's fourth quarter.

Revenues for the full year 2004 were \$195.6 million versus \$179.6 million for the full year 2003. Social research revenues were \$128.2 million versus \$115.6 million last year. Market research revenues totaled \$54.6 million versus \$49.1 million in the prior year. Teleservices revenues were \$12.7 million versus \$14.9 million last year.

Net income for the fourth quarter was \$0.7 million, or \$0.11 per diluted share, versus a net loss of (\$11.3 million), or (\$1.85) per diluted share, in last year's fourth quarter. Net income for the full year 2004 was \$2.4 million, or \$0.38 per diluted share, versus a net loss of (\$8.9 million), or (\$1.47) per diluted share, for the full year 2003. Results for the fourth quarter and full year 2003 were impacted by \$11.5 million, net of tax benefits, for a goodwill impairment charge.

The income tax provision in 2004 is higher than statutory rates and the income tax benefit in 2003 is lower than statutory rates due to the fact that the company is not providing tax benefits on non-U.S. and state losses and the non-deductibility of certain goodwill impairment charges in 2003.

The company expects revenues in 2005 to be between \$200 and \$205 million, net income to be between \$4.4 and \$4.9 million and diluted earnings per share to be between \$0.65 and \$0.73. These net income and earnings per share expectations do not include the impact of a potential com-

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mon stock offering in 2005.

Invoke Solutions, a Wellesley, Mass., research firm, announced its revenue was up 70 percent in 2004 compared to the prior year. This improvement was coupled with strong margin growth over the same period, sparked by increased partner transactions and streamlined operations. Invoke anticipates its 2005 revenue will at least double that of 2004.

Preliminary figures for financial year 2004 indicate that Germany-based **GfK Group** achieved an increase in sales of 12.7 percent from EUR 595.3 to EUR 671.0 million. With earnings before interest and tax (EBIT) including income from participations up by 31.0 percent from EUR 69.5 to EUR 91.0 million, GfK extended its margin by almost 2 percentage points from 11.7 percent to 13.6 percent.

The consumer tracking division achieved an increase in sales of 5.3 percent. Currency effects reduced sales growth by 0.2 percentage points. The health care division achieved an

increase in sales of 38.2 percent. Of this, 7.8 percentage points are attributable to organic growth. Growth resulting from new company acquisitions amounting to 33.7 percentage points relates mainly to the 51 percent stake in V2 GfK in the U.S., acquired on July 1, 2003, and, to a lesser extent, to the takeover of French company m2A, which has been wholly owned by GfK since January 1, 2004. The retail and technology division saw an increase of 12.2 percent. Growth through acquisitions related to the majority shareholding acquired in GfK International, Germany, as of July 1, 2003, contributed 1.7 percentage points to overall sales growth. The media division saw organic sales growth of 7.1 percent. This represents a rise on the previous year, when organic growth was 3.8 percent. In the custom research division, the 14.2 percent growth in the division was above the figure for the previous year. Organic growth accounts for 4.6 percentage points and sales growth on the basis of newly acquired companies for 10.7 percentage points, reflecting the takeover of

GfK Arbor in the U.S.

Media and information firm **WPP** released its results for the year ended December 31, 2004, reporting that constant currency basis revenues in its information, insight and consultancy division grew over 11 percent. Like-for-like revenues were up over 4 percent. Overall margins improved by 2.7 margin points to almost 10 percent. Strong performances were recorded by Millward Brown (in the U.S., Greenfield Consulting Group and MaPs in the U.S., Sadek Wynberg and Precis in the U.K., IMS in Ireland, Ulster, Italy, Germany, China, Firefly in Thailand, Australia and Mexico); BMRB International in the U.K., KMR Group, AGB, Research International (in the U.S., Simon Godfrey in the U.K., Germany, Greece, France, the Netherlands, Spain, SIFO in Sweden, Thailand, Singapore, Hong Kong and Indonesia); Lightspeed Research, Da Vinci in the U.S., icon/DRI, Glendinning in the U.K., Added Value/icon in France and pFour.

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Los Angeles Feb 7-9
Boston Mar 21-23
Chicago May 2-4
San Francisco June 14-16

New York Aug 1-3
Cincinnati Sept 13-15
Baltimore Oct 24-26
Chicago Dec 6-8

104. Designing Effective Questionnaires: A Step-by-Step Workshop

New York Jan 19-21
San Francisco Mar 8-10
Chicago May 10-12
Las Vegas June 28-30

New York Aug 23-25
Cincinnati Oct 11-13
Los Angeles Nov 29-Dec 1

106. Tools & Techniques for Conducting Online Research

New York Mar 8-9
Los Angeles June 15-16
Chicago Oct 18-19

202. Focus Group Moderator Training

Cincinnati Jan 25-28
Cincinnati Mar 8-11
Cincinnati Apr 26-29
Cincinnati June 7-10

Cincinnati July 19-22
Cincinnati Sept 20-23
Cincinnati Nov 1-4
Cincinnati Dec 6-9

203. Specialized Moderator Skills For Qualitative Research Applications

Cincinnati Mar 14-17
Cincinnati July 25-28
Cincinnati Nov 7-10

301. Writing and Presenting Actionable Marketing Research Reports

New York Feb 2-4
Los Angeles Apr 20-22
Chicago July 13-15
Cincinnati Sept 28-30
San Francisco Dec 7-9

Chicago July 13-15
Cincinnati Sept 28-30
San Francisco Dec 7-9

501. Applications of Marketing Research

Los Angeles Feb 10-11
Chicago May 5-6
New York Aug 4-5
Baltimore Oct 27-28

New York Aug 4-5
Baltimore Oct 27-28

502. Product and Service Research

New York Mar 1-2
Chicago June 7-8
Los Angeles Sept 20-21

Los Angeles Sept 20-21

504. Advertising Research

New York Mar 8-4
Chicago June 9-10
Los Angeles Sept 22-23

Los Angeles Sept 22-23

505. Market Segmentation Research

New York Mar 15-16
San Francisco July 12-13
Chicago Nov 2-3

506. Customer Satisfaction Research

New York Apr 5-6
Los Angeles July 26-27
Chicago Oct 18-19

507. Analysis & Interpretation of Customer Satisfaction Data

New York Apr 7-8
Los Angeles July 28-29
Chicago Oct 20-21

508. Positioning Research

New York Mar 17
Los Angeles Nov 4
San Francisco July 14
Chicago Nov 4

509. Pricing Research

New York Feb 18
Chicago June 20
Las Vegas Nov 10

601. Data Analysis for Marketing Research: The Fundamentals

New York Jan 21-Feb 1
Los Angeles Apr 18-19
Chicago July 11-12
Cincinnati Sept 26-27
San Francisco Dec 5-6

602. Tools & Techniques of Data Analysis

New York Jan 25-28
Los Angeles Mar 21-24
Boston May 23-26
Chicago July 19-22
San Francisco Sept 13-16
Cincinnati Nov 15-18

603. Practical Multivariate Analysis

New York Feb 8-11
Los Angeles Apr 13-15
Boston June 7-10
Chicago Aug 9-12
San Francisco Sept 27-30
Cincinnati Nov 29-Dec 2

605. Practical Conjoint Analysis & Discrete Choice Modeling

New York Feb 16-17
Chicago June 28-29
Las Vegas Nov 8-9

701. Conducting Research in International Markets

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Names of Note

continued from page 14

been promoted to senior vice president research.

Karey Stiefer has joined *Chicago Focus* as managing director.

Holly Blankstein has joined Chicago idea generation firm *Energy Infuser* as director of insight and ideas. **Rita Winters** has been named creative strategist.

Warwick Nash has been appointed managing director, consultancy services, *Millward Brown UK*. **Khalid Khan** has been appointed director, Millward Brown UK. And **Jim Fulco** has been promoted to vice president, client service, at the Naperville, Ill., office.

ACNielsen, Syosset, N.Y., has named **Todd R. Kaiser** to its Homescan marketing team as director – custom survey research.

Gary Tucker has been appointed senior vice president at *J.D. Power and*

Associates, Westlake Village, Calif., and will lead client services within the firm's financial services and insurance division.

In addition, **Frank Forkin** has been named senior vice president responsible for managing several practice areas.

Ingather research-denver has named **Raul Cervantes** bilingual operations manager and **Mike Cowgill** call center supervisor. In addition, **Shaun Olson** has been named call center manager and **Michael Robinson** has been named onsite manager.

Boston-based *AMR Research* has named **Guy Dunkerley** research director.

Howard Shimmel has joined *Nielsen Media Research* as senior vice president, client insights. Shimmel will be based in New York.

Invoke Solutions, a Wellesley, Mass., research firm has named **Richard Scott** CFO and general counsel. The company has also named **Jon Elvekrog** senior vice president of product marketing and strategy, **Dolly Hightower**

vice president of channel sales, and named **Ben Cesare** senior vice president of sales.

The NPD Group, Port Washington, N.Y., has named **Chris Swenson** director of software industry analysis for NPD Techworld. Separately, **Kaileen Millard** has been named director of fashion for NPD Canada.

Arbitron Inc., New York, has promoted **Bob Michaels** to vice president, PPM programming services.

International Communications Research, Media, Pa., has named **Gilbert "Gil" Barrish** president and CEO.

ARC Research, Cranford, N.J., has announced several staff additions. **Angela Vila** has been named director of business development. **Patrick Gallagher** has joined ARC as an account executive. And **Daria Friedman** has been promoted to vice president – sales. **Adriane Jackel Keene** has been named project director. She is based in Phoenix.



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2005

Focus Group Moderator Directory



Welcome to the first annual Focus Group Moderator Directory. This directory was compiled by mailing, e-mailing and faxing listing forms to companies that we identified as having on-staff focus group moderators. Each firm was given a free basic listing including one on-staff moderator and also had the option to purchase a write-up, company logo insertion and industry and market cross-reference categories. We list nearly 1,000 moderators at over 800 firms.

The directory has four sections. The first section lists all the firms alphabetically and includes their contact information along with the names of the moderators they have on staff. The second section cross-references firms by the industries and markets they specialize in. The third section is a personnel cross-reference of the moderators and the fourth is a cross-reference by geographic location (metropolitan area). For your convenience, this directory is also available online at www.quirks.com.

Focus Group Moderator Directory Table of Contents

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Industries & Markets Cross-Reference p. 148
Personnel Cross-Reference p. 160
Geographic Cross-Reference p. 166

Is your firm not listed? Go to the online Focus Group Moderator Directory and download a listing form to be included in the online version of the directory.

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Yvonne Campos is president of Campos Inc., a market research and business consulting firm founded in 1986. She has over 20 years of experience designing and implementing market research for a variety of corporations and non-profits. With a background in qualitative research, Yvonne is a nationally known moderator with group dynamic skills that extend from one-on-one interviews to focus groups.

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(see advertisement on p. 17)

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(See advertisement on p. 32)

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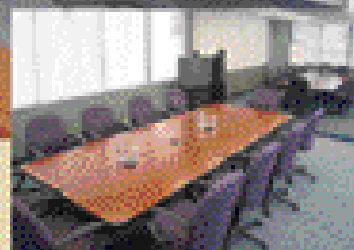
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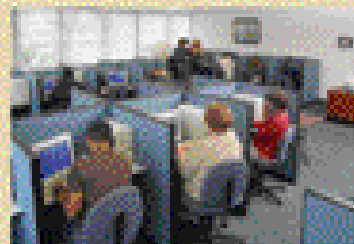
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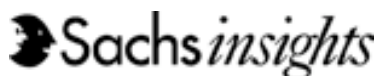
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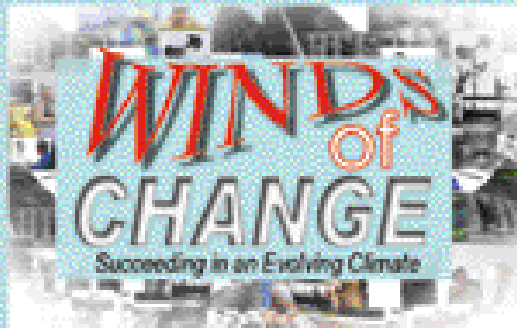
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and also exhibit behaviors that show a heavy tendency toward an on-demand media lifestyle. About one-fourth are medium on-demand media users. And approximately one in six (17 percent) exhibit no on-demand media traits.

Additional tidbits from the study:

- Thirty-six percent of Americans say they are watching less television compared to a few years ago, and 12 percent say they are watching less television because they are spending more time with DVDs.
- The monthly Internet radio and Internet video audience represents an estimated 55 million consumers. In January 2000, 10 percent of Americans had watched Internet video or listened to Internet radio/audio in the last month. As of January 2005, 22 percent of Americans watched or listened to Internet broadcasting

in the past month, and 13 percent have done so in the past week.

- Fifty-seven percent of weekly Internet radio users say they have listened while researching a product or service online, while nearly half (46 percent) have listened while shopping and purchasing online.
- The ability to “listen to content not found elsewhere,” “to control/choose music played” and “more music variety” are the top reasons consumers listen to Internet radio. Fewer people say that “less DJ chatter” and “clearer signal/sound” are the main reasons they listen to Internet radio.
- Broadband connections are just as common as dial-up connections in American households. Forty-eight percent of people with home Internet access have broadband and 48 percent have dial-up service.
- Awareness of XM Satellite Radio has tripled since 2002,

from 17 percent to 50 percent, while awareness of Sirius Satellite Radio has increased even more significantly, from 8 percent to 54 percent.

- Twenty-two percent of radio personality Howard Stern’s listeners say they are “very” or “somewhat” likely to follow him to satellite radio. (In 2004, he announced that when his over-the-air radio contract expires he will be taking his show to Sirius.) Sixteen percent of Americans say they currently listen to Stern.

The findings are based on a January 2005 survey consisting of 1,855 telephone interviews with a randomly selected national sample of Arbitron’s Fall 2004 radio diarykeepers. This study as well as previous studies can be downloaded free of charge via the Arbitron and Edison Media Research Web sites at www.arbitron.com and www.edisonresearch.com. | Q

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I love my DVR

One recent Sunday evening, my wife and I sat down to watch the hilarious Fox sitcom *Arrested Development*. When a commercial break came up, I instinctively grabbed for the cable box remote to fast-forward the DVR. But then I realized we were watching the show live, not time-shifted. And it suddenly occurred to me just how long it's been since we watched a TV show in real time.

With so much (too much!) going on in our lives, we typically watch TV on a time-delayed basis and whiz right by the ads, so I was disappointed to have to wait for the laughs to resume. I don't hate commercials; I'd just rather maximize my free time as best I can.

This little reverie got me thinking about all of the other changes that have occurred in my media consumption habits in the past several years. For example, I haven't watched network or local news in ages. If I want to know what's going on, I jump on the Web. Same for the weather. To get tomorrow's forecast, I don't have to sit through the awful news anchor banter and photo-op fluff pieces. I get what I need in about 30 seconds on weather.com.

Naturally I was quite interested

when I came across a press release on a study by Arbitron and Edison Media Research called *Internet and Multimedia 2005: The On-Demand Media Consumer*. The study focuses on devices and services that give people more control over the media they consume.

Big impact

An estimated 43 million Americans choose to record TV programming to watch at a different time (using technology such as a VCR or TiVo/DVR). Clearly there is a love affair here: Eighty-one percent of owners say they "like" or "love" using their TiVo/DVR. In addition, more than half of TiVo/DVR owners (55 percent) say that their digital recorder has had a "big impact" on their life. (Can I get an amen?) Nearly six in 10 (57 percent) broadband Internet users say that their Internet connection has had a "big impact on their life." (Can I get another?)

Of the consumers who do watch TV at its regularly scheduled time, 32 percent say they do not record because it is too difficult or time-consuming. One-third say they do not want to make decisions about what they are going to watch in advance. (I

think perhaps these people need some kind of talking-to.)

Twenty-nine percent of those who record TV to watch at a different time say the ability to skip through TV ads is the primary reason they record TV programming. Nineteen percent say both the ability to skip commercials and the ability to time-shift viewing are equally important. However, like me, the majority say that fitting their TV viewing into their schedule is most important.

"The study shows that consumers, while still using traditional media, have great enthusiasm and passion for on-demand media," says Bill Rose, senior vice president of Marketing, U.S. Media Services, Arbitron Inc., in a company press release. "Traditional and Internet broadcasters need to adjust their approaches to accommodate this increasingly important consumer segment."

More than 10 percent of Americans can be classified as heavy on-demand media consumers. These consumers own one or more on-demand media devices such as a TiVo/DVR, an iPod or other portable MP3 player

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