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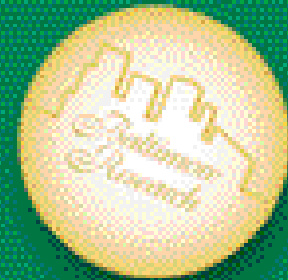
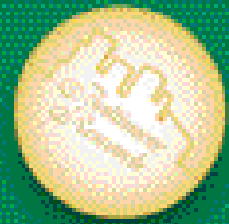
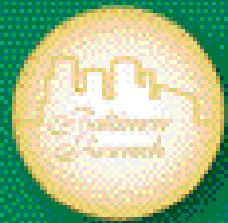
Marketing Research Review

Qualitative research issue

- > Using ethnography to spark new product ideas
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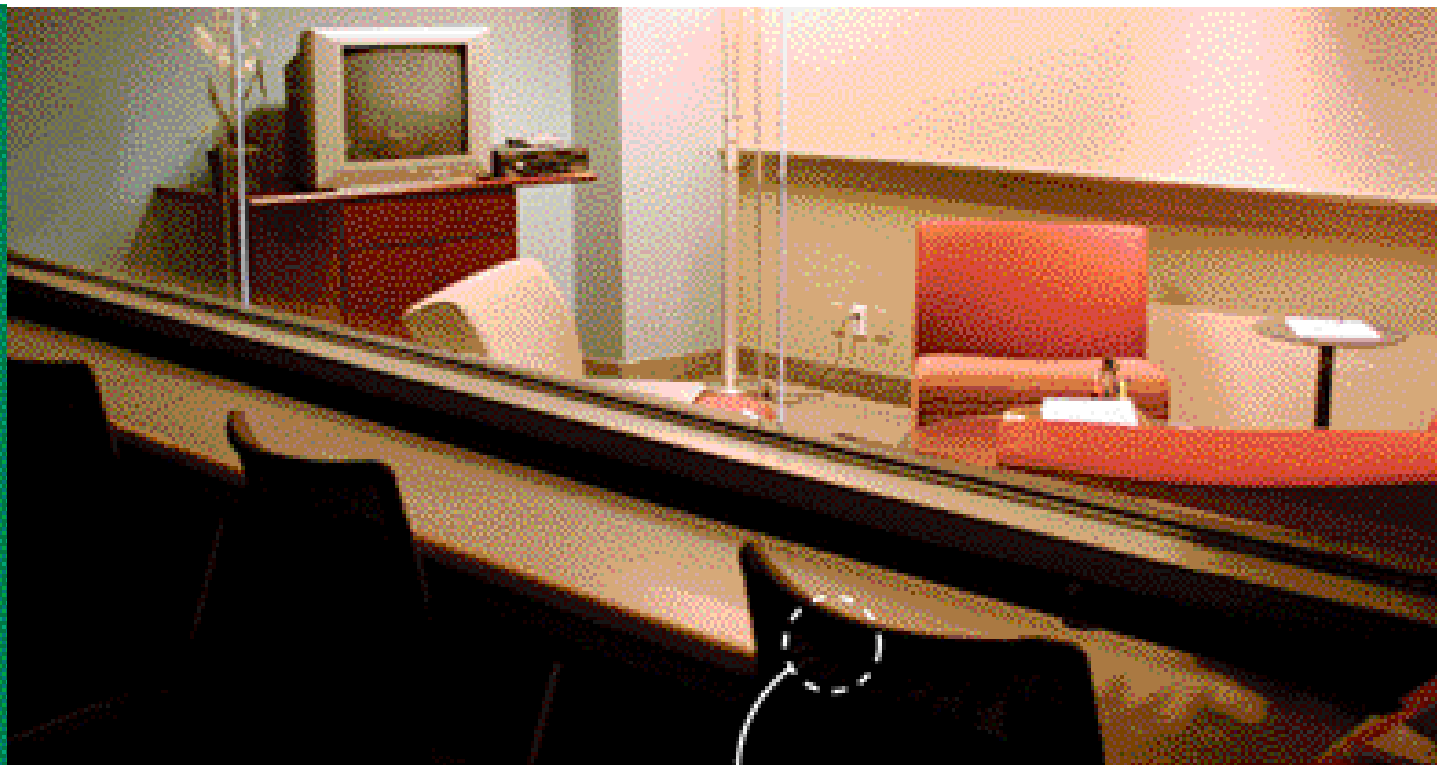
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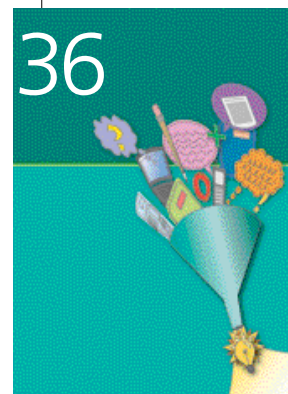


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A Japanese dish with a Mexican twist

Can you name the country whose residents consumed one billion servings of instant ramen noodles last year? Look south of the border, down Mexico way. In a fascinating example of how one culture takes another's food and makes it their own, a *Los Angeles Times* article detailed how time-pressed and cash-strapped Mexican consumers have fallen in love with Japan's ubiquitous packets of dehydrated noodles and flavoring.

In grocery and convenience stores across Mexico, workers, kids and mothers on-the-go can get a filling meal for about 35 cents. The stores supply the hot water, plastic forks and salsa packets. Japanese-based ramen makers Maruchan and Nissin have smartly added flavorings that will appeal to Mexican consumers, such as goat-meat flavored ramen and picante shrimp, beef and chicken varieties. Maruchan has about 85 percent of the market - its name is now the generic term for ramen in Mexico. Though it competes with Nissin, the company that invented ramen, Maruchan is reaping the benefits of its decision to stay in the Mexican market during the peso crisis in the 1990s. While other brands pulled out or raised their prices to compensate for the devalued currency, Maruchan held fast and increased market share. But Nissin hasn't given up. It has an extensive product research department where food scientists work at developing new flavors that cater to regional preferences.

A meal of ramen noodles may taste good, but like most fast food, it's loaded with fat, calories and sodium. That fact, and the way ramen *preparada* is usurping traditional Mexican foods like rice and beans (consumption of beans has dropped by half since 1995, according to a trade group), has many nutritionists and cultural guardians worried. But they are fighting an uphill battle - and their own government. Diconsa, a government agency that distributes food to the rural poor, stocks millions of pounds of Maruchan ramen along with staples like powdered milk, flour and cooking oil for sale in government-subsidized country stores. It began stocking ramen about five years ago in response to store managers, who said customers were increasingly demanding it. "Traditions are changing fast, even up in the mountains and in the countryside," one Diconsa manager said. "You can spend days cooking beans. Maruchan is ready in three minutes. All the mother has to do is boil the water and throw in the chilies."

While the hunger for ramen shows no signs of cooling off, there are those who want to preserve Mexico's food traditions. "Our food is our heritage," one grandmother said. "There are riches on our tables. If we don't partake out of laziness, shame on us."

"Steeped in a New Tradition," *Los Angeles Times*, October 21, 2005

New for Rover: fur highlights and polished nails

Several innovative new pet care products are making a major splash internationally. According to findings from Chicago researcher Mintel's Global New Products Database, an explosion of pampering pet products is leading a global fashion upswing in the market. Products range from toiletries and cosmetics to weight-loss supplements and stress-relief sprays. So far this year, 465 new pet care product introductions have been tracked worldwide, up significantly from 2004's 291 new product launches.

North America dominates the sector, accounting for 58 percent of all new product launches since 2003. Europe and the Asia-Pacific region follow with 16 and 17 percent of the launch share, and Middle East/Africa and Latin America account for 7 percent each.

"Consumers, especially empty nesters, often view their pets as extensions of their families," says Lynn Dornblaser, director of Mintel's Custom Solutions. "They feel that what is good for the human members of the household is good for the pet members of the household. Therefore, many of the products we see on the market are those that tie in with key human trends: looking nice, feeling good and giving yourself an indulgent treat."

Several key cosmetics introductions can be seen, specifically in the fur enhancement category. In the U.S., Pet Society has launched Color Highlights, a product that gives pets temporary fur highlights. P.T. & Son's Bravo Dog Shampoo from Vietnam claims to have color-enhancing properties, specifically formulated for black fur. Pretty nails are also the newest sensation from U.S. company John Paul Pet. It has introduced Nail Lacquer for Cats and Dogs, a fast-drying gloss with nail fortifiers, available in 12 colors. Moving into the fragrance front, South Africa's Kyron Laboratories has introduced Purl Freshness Spray, a baby-powder scented dog grooming spray that doubles as a deodorant and moisturizer.

Stress prevention is also a hot topic in the pet arena. On the stress-free front in the U.S., Nala Barry Laboratories introduced Pet Organics No-Stress Behavior Modification Spray, said to reduce anxiety and nervousness in cats and dogs. Creative Sweets in the U.S. also launched Chill Pills under the Sock Puppet brand. These anti-stress pills contain naturally occurring amino acids used for travel sickness, nervousness and everyday stress.

Another key pet wellness topic is weight control. With obesity in people hitting the forefront of major health discussions, pets are on the hot seat as well. Pet Naturals of Vermont in the U.S. launched K-9 Carb Down, a weight-loss supplement for dogs containing Phase 2 Pet Starch Neutralizer.

Have you tried tryvertising?

The November e-newsletter from trendwatching.com had an extensive piece on tryvertising, an updated form of marketing through product sampling/testing. As Trendwatching defines it, tryvertising is an almost Zen-like way to market by not marketing. It is a "new breed of product placement in the real world, integrating your goods and services into daily life in a targeted, relevant way, so that consumers can make up their minds based on their experience, not your messages."

In addition to copious examples of tryvertising - Oral B distributing its disposable Brush-Ups teeth cleaners to KLM passengers after their in-flight meals; Sony loaning DVD handy-cams to London Zoo visitors for an hour; Kodak and Hyatt encouraging vacationing families to try out the EasyShare Wi-Fi digital camera at select U.S. Hyatt properties - the Trendwatching folks offer helpful tips on how to and how not to tryvertise. Relevance is key: "The moment you push your try-out product to a broad audience at a non-relevant moment, and/or as a stand-alone item, not much will happen. The moment you solve a problem or add to an experience, making trying-out about empathy, not about pushing sales, you're in." Check it out at www.trendwatching.com/newsletter/newsletter.html.

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Consumers aren't holding back on holiday spending

Consumers will be feeling the spirit of the season when they hit the stores for their holiday shopping, according to the findings of a survey by the National Retail Federation (NRF), Washington, D.C. The NRF 2005 Holiday Consumer Intentions and Actions Survey, conducted by BIGresearch, Worthington, Ohio, found that the average consumer



plans to spend \$738.11 this holiday season, up 5.1 percent from the previous year. Furthermore, consumers will spend an additional \$86.62 on themselves.

The survey is in line with NRF's holiday sales forecast, which expects total holiday retail sales to increase 5.0 percent over last year to \$435.3 billion. "Just as retailers plan ahead for holiday sales and promotions, consumers plan ahead and budget for the holidays," says Tracy Mullin, president and CEO of the NRF. "With extra money tucked away to spend on what's important, shoppers will be hitting the stores and spending on their loved ones, and on themselves."

Shoppers will be scooping up a variety of merchandise this holiday season. According to the survey, consumers will be dedicating the majority of their holiday spending to gifts for family (\$421.30) and friends (\$78.99). Their generosity will also spread to the other people in their lives, with consumers planning to spend \$21.05 on co-workers and \$44.16 on gifts for other people, including babysitters, teachers and clergy. Other items holiday shoppers will purchase this year include decorations (\$40.86), greeting cards and postage (\$28.22), candy and food (\$87.75) and flowers (\$15.78).

Consumers aren't forgetting to pick up a few items for themselves while shopping. According to survey results, consumers will spend an additional \$17.68 billion on non-gift purchases for themselves or their families this holiday season. Men will be the most generous when it comes to treating themselves, with the average male spending \$108.87. "While it is always fun to buy a present for that special someone in your life, it is hard to resist adding a little something extra for yourself. Many consumers use two-for-one sales as a great excuse to get a gift for someone on their list and to treat themselves," Mullin says.

Consumers have not forgotten to add a few of their favorite items to their wish lists. Books, CDs, DVDs, videos and video games once again remain popular items, with 55.5 percent of consumers hoping to receive something in that category. Apparel is also another gift favorite, with 54.4 percent hoping to receive clothing or accessories this year. Other popular items on their lists include gift cards (52.3 percent), consumer electronics (38.4 percent), jewelry (26.4 percent) and home décor (23.3 percent).

When it comes to choosing where to purchase holiday items, shoppers

are looking for a deal. More than one-third of consumers (37.9 percent) said that sales or price discounts are the most important factor in their decision to purchase from a particular store. Selection is also important, with nearly a quarter (23.1 percent) of consumers polled ranking selection of merchandise as a top factor, while other consumers chose where to shop based on quality of merchandise (11.0 percent) or location (6.5 percent). Consumers also appreciate good, knowledgeable customer service, with 3.7 percent saying it was the most important factor when choosing where to shop.

Many consumers have already gotten a head start on their holiday shopping. According to the survey, 15.3 percent of consumers started their holiday shopping before September; an additional 6.3 percent started in September. Another group, 18.5 percent, planned to begin in October. More than one-third of consumers (37.4 percent) began their holiday shopping in November and nearly one in four (22.5 percent) will wait until December.

The survey also found that consumers plan to shop at a variety of stores this year, with discounters (71.4 percent) and department stores (59.4 percent) once again remaining top shopping destinations. Other popular stores include specialty stores such as clothing, toy or electronics (46.5 percent) and grocery stores (47.4 percent). The popularity of online shopping continues to grow, with almost half (42.6 percent) of consumers planning to purchase gifts online, up from 38.3 percent the previous year.

The NRF 2005 Holiday Consumer Intentions and Actions Survey was designed to gauge consumer behavior and shopping trends related to the winter holidays. The survey, which polled 7,726 consumers, was con-

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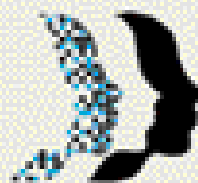
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names of note

Steven P. Henke has been named president of Nashville-based *20/20 Research Inc.*, replacing founder **Jim Bryson**, who has stepped down after 19 years at the helm. Bryson will stay on as chairman of the board.

Alina Serbanica has joined Bucharest-based *Ipsos Interactive Services Romania* as access panels director.

Bellomy Research, Inc., Winston-Salem, N.C., has named **Jim Harper** manager, marketing sciences.



Harper

Heckman

Mark Heckman has been named to the newly created position of vice president, retail insights, at *Sorensen Associates*, a Portland, Ore., research firm

Dina Paglia has joined *Interviewing Service of America (ISA)*, Van Nuys, Calif., as account executive. As part of ISA's acquisition of Opinion One's Computer Aided Visual Interviewing data collection method, **Peter Blair**, director, sales and marketing; **Justin Fister**, senior software engineer; and **Aric Johantges**, senior programmer, have joined the ISA staff.

Insight Express, Stamford, Conn., has named **Michael D. Krameisen** senior account executive in the media sector. In addition, **Jean Marie McCormick**, **Jon Weinstein** and **Annalisa DeLena** have been promoted to project manager. **Samantha Eskenazi** has been promoted to customer service manager. In the compa-

ny's AdInsights group, **Stephen Jepsen** has been promoted to senior manager, **Juliana Aloia** has been promoted to manager of AdInsights, East Coast, and **Melissa Sherman** and **Julie Wu** have been named project manager.

TVG Marketing Research & Consulting, Dresher, Pa., has named **Anne Chapman** vice president, strategic account management.

New York-based *Ipsos Insight* has named **David Nemiah** to its consumer products research division as vice president, global equity and branding.

Heather Jacobson has joined *JW Broadcasting*, Columbia, Mo., as director of sales promotions and research.

Steve Falkiner has joined *Research International* in the U.K. as human resources director.

The NPD Group, Inc., Port Washington, N.Y., has named **Claude Charbit** president of its global beauty business. In addition, **Glen LeBlanc** has been named research director for wireless services; **Drew Hull** has been hired as research director for mobile content; **Ron Friedman** has been named vice president, NPD Fashionworld product and business development; and **Art Spar** has been named vice president, apparel client development.

Martin S. Glogowski has been named president of *GfK Strategic Marketing*, a Bala Cynwyd, Pa., research firm.

Tim Callahan, formerly president of *ACNielsen North America*, has left the company to become CEO of the consumer group at *Berwind*, a Philadelphia investment management company.

St. Louis-based *Maritz Research* has named **Joanne Paternoster** an executive consultant with the hospitality research group. Also, **Elmer Rich** has been named account manager, financial services group, and **Dawn Ray** has been appointed general manager of Maritz Research, UK.

J.D. Power and Associates, Westlake Village, Calif., has named **Gene F. Cameron** executive director of its media practice area.

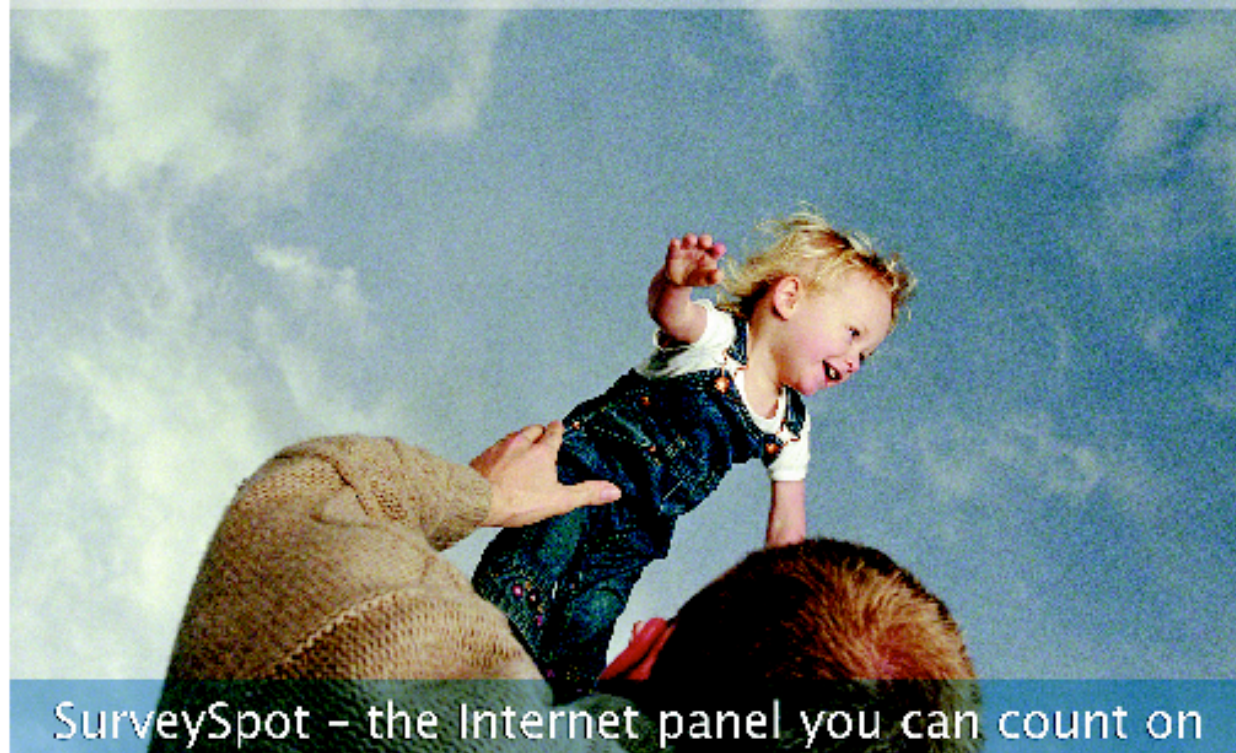
Mike Kirkham, chief executive of U.K. research firm *TNS*, was named winner of *Research* magazine's first-ever CEO of the Year award. The award, which is part of the annual Research Excellence & Effectiveness Awards organized by the Market Research Society in the U.K., is made to an individual who has achieved the most for their business over the past 12 months. Kirkham was nominated for the award alongside **Eric Salama** of Kantar and **Dean Wiltse** of Greenfield Online. Separately, *TNS* announced that **David Lowden**, currently chief operating officer, has been appointed to succeed Kirkham as chief executive on March 1, 2006.

Abt Associates, a Cambridge, Mass., research firm, has named **Richard Kulka** senior vice president of strategic business development. **Carol Simon** has been added to the firm's health policy and clinical research division. **Mark Spranca** has also joined the division as a vice president.

Robert Callaway has joined Los Angeles research firm *PhaseOne Communications* as vice president operations. In addition, **Joel Lowell** has been named senior research manager and **Melissa Vogel** has joined the firm's analytical department.

continued on page 76

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product and service update

Independent focus group facilities unite

A consortium of owner-operated focus group facilities has banded together under the name First Choice Facilities. The staff of each office will handle project coordination from city to city, to assist moderators with scheduling their focus groups. The facilities include: Superior Research, Inc., Atlanta; Focscope, Inc., Chicago; Trotta Associates Market Research, Los Angeles/Orange County; Focus Plus, Inc., New York; Fleischman Field Research, San Francisco; The Gilmore Group Research, Seattle/Portland; and Superior Research, Inc., Tampa. For introductory multi-city discounts or more information call 888-FCF-BIDS (888-323-2437) or visit www.firstchoicefacilities.net.

Do mobile surveying with Entryware

Vancouver-based Techneos Systems Inc. is now offering Entryware version 5.0, software for mobile surveying using devices such as Pocket PC or Palm OS units. Available in three editions - Enterprise, Professional and Small Business - the Entryware system supports deployments ranging from five handheld devices in a single location to thousands of devices around the world. Its multi-lingual interface supports double-byte character sets such as Japanese and Chinese, and provides software tools to simplify the process of entering translated content.

Researchers can provide instant, up-to-date survey results to their managers and customers via a Web-based reporting interface. Handheld users in the field stay connected through Entryware Server, using any combination of wireless or wireline communications - ranging from GPRS to Wi-Fi to direct handheld-to-PC cable connection. For more

information or to download a free 14-day evaluation copy visit www.techneos.com.

Simmons GLBT study now out

Fort Lauderdale, Fla., research firm Simmons has released the Gay and Lesbian Consumer Study, which examines the gay, lesbian, bisexual and transgender (GLBT) population in the U.S. Simmons uses a national probability sample survey that provides information about the size, characteristics and behaviors of the GLBT population. With an estimated annual buying power of over \$600 billion, the GLBT population is drawing increased attention from advertisers and marketers. The study contains over 40,000 variables, offering insights into the consumer attitudes and behaviors of the GLBT population segment relative to the general market. For more information visit www.smr.com.

Info management system compiles data enterprise-wide

U.K. research firm Nunwood has launched Fizz, an information management service designed to facilitate the dissemination of existing enterprise-wide information to executives and others charged with informed decision-making. Fizz provides a single, centralized information depository, consolidating and aggregating data from across the enterprise. Information developed internally such as marketing documents can be pooled with data fed in by the client's external service agencies such as research reports, media buying statistics, regulation updates, competitor data, customer profiles and ad tracker reports, all regardless of format or platform. The moment this market intelligence is fed into the system, it becomes available, via an intranet, to all appropriate client-designated employees.

Information is accessed via a

Google-style search query field, integrated within a client's business system. The system front end is tailored to recreate the look and feel of the client's existing intranet system, with the idea that workers will feel more inclined to utilize something they perceive as familiar.

To help users traverse the huge volume of data amassed, Fizz uses an indexing service which catalogs all the keywords and phrases within each new document uploaded to the system. Each of these is then assigned a relevance value, so that when a user searches for a keyword the system returns any related document in order of relevance.

Via the search results page, users can define their particular data requirements. Research projects, for instance, can be displayed as a single topline document or a series of interconnected component files, allowing users to view the level of detail which suits them. For more information visit www.nunwood.com.

New Web-based data analysis tool from Monitor

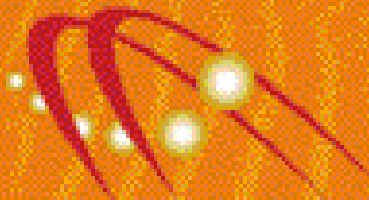
Monitor Software, a division of Cambridge, Mass., consulting firm the Monitor Group, has introduced MarketSight, a Web-based application that is designed to streamline the research analysis process by allowing non-technical business users, as well as professional researchers and statisticians, to slice and dice data in real time. It runs applicable statistical tests and color-codes results to draw user attention to interesting and statistically valid trends in the data. MarketSight offers online charting for viewing results in graphical form. Charts can be exported to applications such as Microsoft PowerPoint. MarketSight is available as a hosted or installed

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research industry news

Acquisitions/transactions

PRIMIS Marketing Group, Atlanta, has acquired **MarketModels, Inc.**, a Wickford, R.I.-based data analysis firm.

Interviewing Service of America, Van Nuys, Calif., has acquired **Opinion One's** proprietary Computer Aided Visual Interviewing data collection method and added it to its list of services.

Synovate has acquired Asia-based youth research agency **The Filter Group**. Filter was started in 2000 by Ian Stewart and Stuart Wason. The company will become part of the global specialist unit called Synovate YC. Stewart becomes the head of Synovate YC in Asia, based in Bangkok. Wason has decided to pursue new interests and will remain in Singapore.

Paris-based **Ipsos** has entered into an agreement to acquire U.K. research firm **MORI Group Limited**. MORI had 2004 revenue of EUR 64.5 million with operating profit EUR 8.2 million. Between 2000 and 2004, MORI's compound annual revenue growth was 13.2 percent. MORI, which has approximately 460 employees, is headquartered in London, and has offices in Manchester, Edinburgh, Belfast and Dublin. Ipsos UK and MORI will be merged to form Ipsos MORI. Richard Silman, Ipsos UK CEO, will lead Ipsos MORI as executive chairman. He will also be responsible for the media research business. Brian Gosschalk will be chief executive of Ipsos MORI, responsible for all client areas of the business, except media and operations. Sir Robert Worcester, founder of MORI, will take on a new role as chairman of the advisory board of Ipsos Public Affairs worldwide. Sir Andrew Likiernan, MORI's chairman, will

continue as a consultant.

Port Washington, N.Y., research firm **The NPD Group** has acquired **DisplaySearch**, an Austin, Texas, provider of market research on the flat-panel display industry. DisplaySearch will continue to operate independently as an NPD Group company.

Alliances/strategic partnerships

Oslo-based **Future Information Research Management** has signed an agreement to provide its Confrimit survey and report platform to London research firm **Research Now**, which plans to utilize and integrate the Confrimit platform across its online fieldwork services and panels.

Marten Board International, a full-service market research and consulting company in Serbia, has joined the **Harris Interactive Global Network** of independent market research companies.

Association/organization news

The **Council for Marketing and Opinion Research (CMOR)** and the **Marketing Research Association (MRA)** announced a formal research alliance intended to enhance their synergies and better secure the protection of the research profession in the U.S. As part of this alliance, the two organizations will combine support services and share structures while maintaining their individual leaderships.

Both organizations see their alliance as another step toward unifying the marketing research profession, as evidenced in last year's merger of MRA and the Interactive Marketing Research Organization (IMRO). "This alliance is a win-win for CMOR and the research industry," says Terri Hansee, chair of CMOR. "By gaining the support of a larger organization we strengthen our

resources while maintaining our independence, which is important to the work we do."

The **American Marketing Association** has given its 2005 Charles Coolidge Parlin Marketing Research Award to Howard R. Moskowitz. The award was presented to Moskowitz for his notable contributions and dedication to the ongoing advancement of marketing research practice. Moskowitz, president and CEO of Moskowitz Jacobs Inc., a White Plains, N.Y., research firm, has written and edited 16 books and over 300 articles, and serves on the editorial board of many journals. The Parlin Award was established in 1945 as a memorial to Charles Coolidge Parlin, who is recognized as a founder of marketing research.

The **Mystery Shopping Providers Association (MSPA)** has announced its 2005-2006 North America board of directors. The MSPA North America Board consists of 12 directors elected by MSPA North America members. The directors serve three-year terms. The board also includes the president of MSPA Europe. The new officers for 2005-2006 are: president - David Rich, president of ICC/Decision Services, Wayne, N.J.; vice president - Tom Mills, co-owner of Howard Services Inc., and managing partner of Service Sleuth, the Mystery Shopping division of Howard Services, Boston; treasurer - Christopher Warzynski, vice president of Beyond Hello, Madison, Wis.; secretary - Reb Henry, president of Feedback Plus, Dallas. Additionally, two new directors joined the MSPA board: Susan Seiler, president of SG Marketing Group, Arnold, Calif., and Gary Topiol, COO of **GfK NOP Mystery Shopping**, New York.

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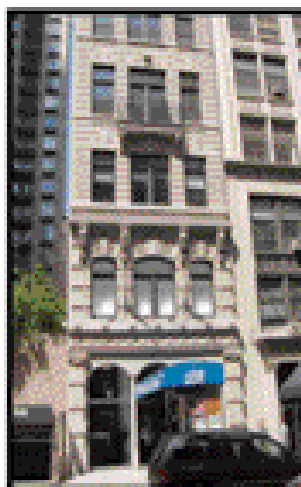
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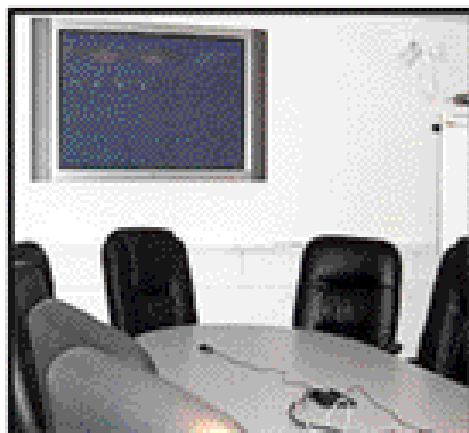
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Using the analytical hierarchy process

If you're faced with a situation where you need to test reactions to a number of variables or trade-offs, the analytical hierarchy process (AHP) is a method that works well when there are few variables to test. Testing five or fewer variables is the optimum and you likely can do the number-crunching yourself. It works particularly well when helping manufacturers determine how to bundle product features, how to determine which brand goes with a particular product or which payment options to offer, etc.

AHP allows the researcher to take several decision attributes or known variables that go into a decision process and, by polling respondents, determine which are the most important. Decision variables or product features are paired against each other and respondents pick the feature they like best among the two variables/features, e.g., cost vs. reliability. Respondents can choose between two choices or variables at a time.

Factors are then stacked up against each other on a scale from 1 to 100, which roughly equates to percentages or impact on a 100-point scale among the factors tested.

The main advantage of this technique is that it can effectively determine the relative importance of items used as criteria for making a decision and show which choice might have the best "play." Traditional research methods often fall short because you can only test one feature against another. It's also easy to use and requires no fancy software or proprietary techniques.

"When asked to rank or rate a list of things according to some criterion, such as preference, value, risk or cost, one might be able to rank their order and even to assign some numbers to their relative positions on the list," wrote David Hallowell, a founding partner of Rockland, Mass., consulting firm Six Sigma Advantage, in an online article. "However, two problems arise in that simple scenario. First,

Editor's note: Bob Beaulaurier is partner, and Marlene Holm is an account executive, with Market Decisions Corp., a Portland, Ore., research firm. They can be reached at 503-977-6747 or at bob@mdcresearch.com or marlene@mdcresearch.com.

whatever measurement scale is chosen is just ordinal at best. A rating of 10 does not mean the preference, risk or whatever for an item is twice that of an item rated 5. (One might be tempted to treat the numbers as a ratio scale, but there really is no basis for it.) Second, when there are more than a few items on the assessment list, it gets hard to keep all the prioritization considerations in one's mind at the same time - making it hard to think about and to complete the task. AHP takes that simple-enough looking prioritization problem and makes it simpler and more meaningfully measurable. It reduces the list into pairwise comparisons and asks for a ratio assessment of each pair."

For example, if one were analyz-

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ing which home luxuries were the hot buttons for home buyers, one might trade off “three-car garage” versus “central air conditioning” versus “view of the city” versus “gated community” versus a “gourmet kitchen.” Using AHP the relative performance of the home luxuries could be compared. The question might look like:

Q1. If you were choosing between home options, please select the one that is more important to you:

1. Central Air Conditioning
2. Gourmet Kitchen

With AHP, each of the attributes, in this case home luxuries, would be compared against all other home luxury items. This means you know the relative performance of each attribute versus all other attributes. Conjoint users often do not have direct comparisons, which makes it difficult to use the analyses for different situations. With AHP it is easy to take out variables and rerun the analysis because you have data for each variable. So a home developer in this example could use the analysis again when going to a location that did offer city views, for example, to see which attributes would be the top three to include in a marketing brochure.

Similarly, AHP can be easily utilized for subsegments. This is particularly useful when you do not know who the target audience is ahead of time. Again, this may be more difficult with some other analyses which do not collect data for each attribute and it could turn out that your target market is interested in a subset of variables that were not compared to each other directly. In the luxury home example, because we asked about “view of the city” against all other variables we can take it out of the analysis. Similarly, in a place like Phoenix where central air conditioning is a given in any home, we could take that out of the analysis

in that market and see the relative performance of the remaining variables.

AHP also helps capture both subjective and objective evaluation measures, providing a useful mechanism for checking the consistency of the evaluation measures and alternatives suggested by the team, thus reducing bias in decision-making.

Getting started

AHP is basically a five-step process:

1. Identify the factors of the decision.
2. Compare each factor against every other factor, indicating how much more (or less) important Factor A is to the decision than Factor B.
3. Change those “soft” comparisons to numeric values.
4. Place the numeric values into a pairwise comparison matrix, with the As in the rows and the Bs in the columns. Note that each answer results in two cells being filled.
5. Normalize the matrix to get the weights.

For example, if one team within a company believes that Factor A is much more important to customers than B, B and C are of roughly equal importance, and D is slightly more important than either B or C and moderately less important than A, the analytical hierarchy process can show the relative weights (in percent) of how important Factors A, B, C and D are.

This also gives a starting point for tweaking a decision. For instance, suppose Factors B and C, instead of being exactly equal, were a couple of percent different. You can test to see how relevant that difference is. Once you have the weights of these factors, you can run what-if scenarios and simulate their impact on the bottom line.

Using the home luxury example, suppose that “view” and “gated community” perform relatively

equally. It may be possible to focus on promoting the “gated community” aspect instead of property views, which might give an equal punch to marketing efforts for a lower cost since properties with views are often more expensive for developers to purchase and for homeowners in terms of property taxes, etc. Of course, a caveat is that underlying these decisions may be other factors (in this case security and location, location, location), so some care and consideration also goes into transferring the analysis to other situations.

How the technique works

Each of the cells in the pairwise comparison matrix is the quotient of the row it represents by the column it represents (row divided by columns). The first cell in the upper left-hand corner is A/A, which will always equal one - same for B/B, C/C. The second cell in the first column of the matrix is

Pairwise Comparison Matrix 1			
	Check	Pay-by-phone	Online
Check	A/A	A/B	A/C
Pay-by-phone	B/A	B/B	B/C
Online	C/A	C/B	C/C

Pairwise Comparison Matrix 2			
	Check	Pay-by-phone	Online
Check	1	320/80	340/60
Pay-by-phone	80/320	1	200/200
Online	60/340	200/200	1

row B, column A. Here, find the question where Factor A is compared to Factor B. Then, take the number of respondents choosing Factor B and divide that by the number choosing Factor A for that question. This quotient is then put into that cell.

This procedure is followed for all of the cells. For each cell, there is

also a cell with its inverse in the matrix. Recognizing this saves looking up the question twice when finding the quotient for each of the cells. Next, the columns of this comparison matrix are added. The sum is used to weight that column and each of the factors in that column are divided by the sum. The resulting matrix is called an

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Pairwise Comparison Matrix 3

	Check	Pay-by-phone	Online
Check	1.0000	4.0000	5.6667
Pay-by-phone	0.2500	1.0000	1.0000
Online	0.1765	1.0000	1.0000
TOTAL	1.42647	6.0000	7.6667

adjusted matrix. The average of each of the factors' rows in the adjusted matrix is a simple mean. It is gathered by adding the cells in the row and dividing that sum by the number of cells in the row. This average is the weighting that respondents put on that factor on a scale of 1 to 100. This procedure can be applied to more or fewer features or attributes.

As an example of AHP in action, say a utility company wanted to determine which type of payment method (by check, by phone or online) its customers most preferred. To determine the relative strength of payment options cus-

tomers we re asked to choose from the following:

1. Check vs. pay-by-phone
2. Online vs. check
3. Pay-by-phone vs. online

All options are traded off against each other as shown in pairwise comparison matrixes 1 and 2.

Note that we really only have choices for three items in comparison matrix 3. As shown in matrix 1, three of the options are comparing one variable to itself (A vs. A, B vs. B, and C vs. C). B vs. A is the same as A vs. B, so we do not need to ask that question twice. We recommend rotating the order to avoid any ordinal bias when

administering the questions. Adjusted comparison matrix 1 shows the ratio of respondents indicating their choice was the row over selecting the column.

The adjusted comparison matrix is a fancy name for a table that weights the relative performance of the attributes tested so that they value 100 points by dividing the column totals from the pairwise comparison matrix. Pairwise matrix 3 shows the numbers utilized and the results are shown in adjusted matrix 2. Since most decision makers and market researchers are very comfortable with 100 points, this is an appropriate way to show the relative strength of each of the attributes. In short, the adjusted comparison matrix weights each variable's contribution out of 100 points.

The results in adjusted comparison matrix 2 show that the relative performance of paying by check (70) still significantly outperforms the online (16) and pay-by-phone (14) options for this particular utility company.

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Not just a gut feeling

AHP offers the following benefits:

- It converts “soft” assessments (used by people) into “hard” values (that can be used by programs). Example: In choosing a car, John likes the V-8 power and Jane likes four doors best. With AHP we can look at car buyers overall and see what percent of the time they choose V-8 or four doors over another feature. We can even run separate AHP analyses for males versus females so that we are not just taking product managers' or executives' gut feelings for what the marketplace wants.

- It allows for shades of gray. Continuing with the car theme, suppose the V-8 motor is not an option. Traditional research approaches are difficult to use when you pull out variables once you get to the analysis phase. With AHP, because of multiple paired comparisons, you can run the analysis

Adjusted Comparison Matrix 1
(Ratio of # selecting the row/# selecting the column)

	Check	Pay-by-phone	Online	Result
Check	1.0000/1.42647	4.0000/6.0000	5.6667/7.6667	Average of row
Pay-by-phone	0.2500/1.42647	1.0000/6.0000	1.0000/7.6667	Average of row
Online	0.1765/1.42647	4.0000/6.0000	1.0000/7.6667	Average of row

Adjusted Comparison Matrix 2

	Check	Pay-by-phone	Online	Result
Check	0.70103093	0.66667	0.73913043	0.702276
Pay-by-phone	0.17525773	0.16667	0.13043478	0.157453
Online	0.12371134	0.16667	0.13043478	0.140271
				100

without the V-8. Each variable is compared against each of the other variables, so you know definitively from each respondent which option they would choose because no variable comparison is left out of the analysis as with conjoint or some

other common analyses.

Similarly with our utility payment options, using the same data that is already collected by comparing each pair against every other pair, you could see the percent choosing “paying by check” over

“paying online” if “pay by phone” were eliminated from the options. Therefore it gives you the ability to simulate different options and different costs associated with different options.

By using AHP, we can often go right to the behavior and the activity people would choose, avoiding all of the other variables that a fancier analysis might include. This can be particularly helpful if there are lots of variables, parameters and baggage that people use to make their decision.

A simple AHP analysis isn't always better, but it can be straightforward to use. Though we advise you to always consult and support your market research professional, AHP is something that most qualified researchers can do with a simple spreadsheet without buying sophisticated software. (An Excel file with an active AHP worksheet is available at www.mdcresearch.com/extranet/ahp_example.xls.) | Q

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A little homework can work wonders

Depending on the goals of a specific qualitative research assignment, it can be highly productive for respondents to arrive at focus groups thoroughly primed and well-immersed in a particular category.

In order to accomplish this, a skilled moderator calls upon various tools and techniques in the form of respondent homework assignments. These might include activities such as collage-building, “thought log” diaries, audio recording of spontaneous impressions, cognitive sequencing and in-situ product photographs, to name a scant few. A broad array of tools and techniques can be used in tandem or individually, depending on appropriateness and project objectives. While there is obviously no one-size-fits-all application of these techniques, it is generally felt by this moderator that some form of respondent preparedness can enhance many qualitative investigations by heightening the depth and breadth of insight and learning.

The premise here is that when respondents are thoroughly “into” a particular subject matter, on a pre-meditated level, they are more psycho-

logically and verbally equipped to contribute, in a meaningful way, to the specific research goals at hand. This preparedness, in turn, combats what we as qualitative researchers and clients have all, at one time or another, disappointingly experienced: the cocked heads and quizzical, empty stares of respondents reacting to questions that, from their perspective, come far out of left field, jarringly out of context with their everyday living experiences and thought processes. This is sometimes what happens when clients and researchers are too close to their products, when objectivity and an unbiased perspective are lacking. Why we do research, after all, is to gain deep insight into how consumers conceptualize and think about a particular category, how they filter choices and actually use a given product, brand or service. This is great, but let’s give our respondents some useful tools to help them dig beneath the surface to produce information that is truly revelatory and useful to brand and marketing groups.

Take for example the goal of getting to the core of brand image/essence in

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repositioning and branding work. Asking respondents to create separate collages epitomizing a competitive set of brand values, for instance, can really help unearth image distinctions and nuance – and reveal thoughts, feelings and associations which may otherwise be extremely difficult for respondents to articulate. There are other reasons for using this type of tool: Groups are simply livelier and more productive from the get-go. Following brief introductions at the beginning of the actual focus groups, discussion kicks off energetically with respondents telling the “story” of their collages (or other homework assignments), interpreting with ease what the visual images mean to them.

In designing effective qualitative study methodologies, researchers and clients should, therefore, carefully consider whether or not respondent preparedness will benefit study output.

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Homework assignments may well yield a number of advantages relative to strengthening group dynamics and, therefore, the quality of the learning that ensues:

- Respondents immediately interact and bond with one another, resulting in less lost time due to respondent warm-up. When respondents arrive at focus groups with some form of homework assignment in hand, I have

observed that they are far more likely to get acquainted with one another in the waiting area, which in turn reduces the amount of time required for group room warm-up. To set this interplay in motion, I typically drift into the respondent waiting area and announce that everybody in our group has, for example, kept a diary chronicling how kitchen remodeling decisions have been made - how design ideas were filtered, if and how


husbands contributed to the overall process, the role of professional design consultants, what the biggest headaches were, etc. Given the animated discussion that usually follows, respondents then enter the group room with a sense of camaraderie and shared experience, which makes much of the standard introductory sequence superfluous.

- Groups are more productive from the get-go. Given the above scenario and enhanced levels of familiarity and ease, respondents are ready to jump right into conversation. Because they have already essentially bypassed stiff, ritualistic introductory formalities (e.g., name, work, household composition, etc.), respondents are primed and ready to contribute to the heart of the research endeavor with deeper and more revelatory insights. This is not to assume, however, that every research topic lends itself to this approach. While waiting-room conversation about interior design decisions can, for example, be encouraged with highly involving, positive results, issues of a highly sensitive and/or personal nature - subjects involving potentially embarrassing topics such as incontinence, female pattern baldness, impotence - obviously do not lend themselves to this type of uninitiated, open waiting-room discussion. In these instances, homework assignments such as diaries, sentence completion exercises, adjective checklists and storytelling may be better used as private instruments shared only with the moderator.

- Descriptions/portrayals of brand persona are animated and involving - and respondents are more able to verbalize emotional and multi-sensory responses that are otherwise difficult to articulate. Homework assignments involving all types of collage-building, cartoon drawing, fictionalized balloon dialoguing, and personifications are particularly useful to help respondents differentiate within categories that may be functionally commoditized. Take for example cooking oil, specifically corn oil. Without homework assignments and the application of

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projective techniques, homemakers in groups were unable to delineate, to any significant degree, between oil brands. When asked to develop collages at home that epitomized the respective brands, however, rich descriptions revealed brand-differentiating imagery which was firmly rooted in regional cooking traditions and the trans-generational influences of one's mother, even grandmother.

- The subtleties of situational context and spontaneous thought can be captured as they occur, rather than through the potentially distorting filter of recall. We all know what it's like to try to reach back into the deep recesses of our minds and recreate a specific situation or set of circumstances - perhaps a range of conflicting emotions we felt at particular point in time, what factors influenced a specific buying decision, how a fragrance or aroma affected our mood, what distractions may have pulled us away from initial impulses, how the advice of a good friend or coercive salesperson may have eroded our buying convictions, etc. The point here is that, with the passage of time, our memory of occurrences gets clouded, and it is virtually impossible to reconstruct in focus group rooms many spontaneous thought processes. Recording this information through various homework assignments can, however, document this invaluable information.


- The resulting expression of nuance can be useful for ad agencies and creative development. Client teams are able to quickly distill what brand essence and usage scenarios are all about.

Worth the effort


While it may cost researchers more time in terms of upfront planning and preparation, the application of homework assignments can often be worth the extra effort. An experienced moderator can determine whether or not this approach will benefit a given study and set of research objectives. | Q

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XSight 1.2

Using computer software to assist with the analysis of qualitative research transcripts from focus groups and in-depths has long been commonplace in the realm of social policy research or academic research. But watch a typical qualitative researcher in the commercial sector at work and a very different picture emerges. This is the world where printouts and highlighter pens rule supreme, and where extra desks, tables and even floor space are commandeered in the pursuit of insight. Only after all the hard work has been done is a computer likely to be used, and then only to write a report in Word or put together a presentation in PowerPoint.

The critical difference in the commercial world is time. The standard

computer-assisted qualitative data analysis (or CAQDAS) tools in use by academic qualitative researchers, such as NUD*IST (or N6) and NVIVO, are painstakingly time-consuming in the early stages. They use a code-and-retrieve method, which relies on the user marking up each entire transcript in relation to a classification scheme or code frame before they can start to make any headway on the analysis. Analysis is then carried out effectively by querying the database of marked-up sections of the transcript, where all the relevant fragments can be viewed together, along with other annotations you may have applied. For most commercial research it is overkill. Time, budget and the sheer pace of the businesses driving the research

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mean it has to be a much shorter track from evidence to insight for the qualitative researcher.

It was a problem that QSR, the Australian software developer behind both N6 and NVIVO, realized needed addressing with a lighter-touch tool modeled on the way commercial researchers work. QSR launched that tool, XSight, in the middle of 2004 and the qualitative analysis and management software product has benefited from two minor upgrades since then.

What makes XSight useful to commercial researchers is that it is modeled largely on the ways most qualitative researchers tend to work. Note that I say "ways," because different researchers tend to have different methods. Fortunately, this tool is sufficiently flexible to accommodate many of them without tripping up.

It certainly does not attempt to do

**XSight qualitative research data analysis software
from QSR International (www.qsrinternational.com)**

Pros

- Flexible workflow model; easy to use
- Helps manage and analyze projects
- Reports exportable to Word or PowerPoint documents

Cons

- Lacks true multi-user support
- Some researchers will find it hard to adapt their methods to its structure

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the thinking for the researcher. This is a common misconception – and perhaps even a source of mistrust of CAQDAS among researchers – that the software is somehow going to perform machine-directed textual analysis and make the deductions for you. It is probably better to think of XSight as a vast transcript organizing and cataloging system with the added benefit of electronic markers that provide instant recall of everything marked.

Leap of faith

XSight comes as a standard Windows desktop tool and is very easy to operate. What is harder is getting your mind to work in the rather compartmentalized and task-oriented manner of computer software. It requires a leap of faith that, after working through all the steps, the insights will flow and you won't have overlooked any revelations. The irony is that, with a little practice, you are less likely to overlook anything with this tool than with the old "paper, marker pen and recall from memory" approach.

Unlike conventional, academic CAQDAS, the focal point with XSight is really the interview guide. At the program's core are three components: the transcript, the analysis framework (which usually equates to the guide), and commentaries (which are essentially all the things that interest or jump out at you as you go through your transcripts).

The framework is a tree structure of headings and subheadings which you can make as granular as you like. So if "packaging" for a product was your high-level topic, "color," "images" and "wording" might be the next level down, and within, say, "color" you could list "pink," "blue," "white," then down to "like," "dislike," and so on. It pays off going for a pretty detailed analysis frame, as you will be able to pull out all your observations at any level in the hierarchy and aggregate all those below it.

If you set up the framework in advance of the fieldwork, this could

be used to supplement the guide, or even replace it, if you provide your moderators with copies of XSight on their laptops. This was how one firm I spoke to had chosen to use it and found it a great advantage, as the guide could be refined during fieldwork, and moderators could do some of the analysis immediately after the group had finished.

Amazingly, it will work quite happily without a transcript, if you want to work directly from tape or video. You just set up each interview or group, and don't bother to import any text, but enter in your commentaries directly.

Articulated trees

If you are working with transcripts, you are likely to pick one, then work through it, slotting in your observations as commentaries into the relevant point into the analysis framework tree. Here, the screen is divided into three main areas: transcript, analysis framework and a space for your comments and observations. When something jumps out at you, you click on the relevant level in your analysis hierarchy and enter some text. Cleverly, there are three different kinds of commentaries: articulations, verbatims and interpretations.

For a verbatim, all you need to do is highlight the section of text and drag it onto the relevant heading in your framework. This usefully creates a hyperlink back to the text, which means, several hundred comments later, you can always see the full context of any verbatim that you pulled out, simply by clicking on the link. Articulations lend themselves to paraphrases and other specific observations you wish to flag; interpretations are your first moves toward the insights you will draw together into the report.

If you have more than one transcript, you can classify them by demographic as this can highlight some of the differences you may be looking for later on in your analysis. Demographics could be the age range of each group, or gender, or

geography, or personal attributes if the transcript is of an in-depth interview. You can apply multiple attributes so you could even analyze by day of the week or moderator.

Cut the transcript

If you choose to work directly from audio or video, and forgo getting a text transcript, it pays still to define and classify each group or in-depth interview separately. This way, you just leave the transcript part empty, and simply use the analysis framework to start filling in your commentaries. Of course, you will have to type in any verbatim quotes, but it can make for very fast turnaround overall.

The real power comes once all of the marking-up or coding has been done. Bringing everything together is done through the query window, where you can sift and sort all the responses and use just about any classification or any level of the analysis framework to pull out all the responses for all the groups, or filter them by demographics. This is where the real thinking goes on, and at the bottom of the window, you can open up a document which you can gradually develop into your report.

Reports can be either destined for Word or for PowerPoint. In either it will let you use headings and sub-headings in Word, or slides and bullet points in PowerPoint, to organize your report. It seems to work a lot better in Word. In version 1.2, PowerPoint slides are simulated on screen, so you can see exactly how much will fit on each page. Either way, you can drag in the actual verbatims that clients love, without having to retype them and with all the relevant demographics on display.

You can share work to some extent with the tool, but it is not a multi-user tool, and relies on your managing multiple copies yourself then using the merge process to consolidate the results.

Analysis in practice

Roxanne Suprina runs her own qualitative research consultancy,

FocusedInsights, in Waltham, Mass., and has used XSight with considerable success on several of her larger assignments. “Being a researcher in the private sector as opposed to the public sector I typically have to get a report to my clients within two weeks of completing the field work. This means that I need to provide a thorough, insightful and actionable report in very little time so I am looking for ways to do that and not jeopardize the integrity or the value of the deliverables I provide.”

It was the tool’s abilities to help organize her work on larger-scale projects that appealed to her. “Where I have used it most is when I am doing in-depth interviews, or where I am moderating focus groups and I have another moderator with whom I am partnering,” she says. “To try to thoroughly analyze and understand what I have heard across 35 or 40 interviews, conducted over the course of a month, I really need to go back and revisit the transcripts

and reorganize and structure it in a fashion that works. XSight has been very helpful for that.”

Typically Suprina works with transcripts, using commentaries to add her thoughts or capture exemplary verbatims. “One of the things I value most about XSight is the ability to capture a quote or a commentary and then track it back to its source,” she says.

Since XSight was released last year, qualitative researchers have generally proved reluctant to embrace the tool. Suprina suspects that price can be a deterrent for the one-person qualitative boutiques that form the backbone of the qualitative industry in the U.S., as the product does cost around the \$1,000 mark.

She suspects another issue is the wide variation in analysis methods among researchers. “We are all victims of our habits, to some extent. And because of the tight timelines, to go up that steep learning curve is quite a challenge,” she says.

“Also, there are varying degrees of

rigor and various styles between researchers. It is really an issue of scale, and how convinced you are of your abilities; of how accurate you think you can be at nailing what you have learned. I don’t ever want the day to come when a client says to me ‘I just looked at some of these transcripts and I am not finding what you found.’ So I do find it reassuring that with this I can rely on going back and really making sure that I am applying some rigor to the process.”

Real thinking

Perhaps it is over-optimistic to think that the more creative, free-spirited and self-confessed technophobes among those practicing qualitative research will find much excitement in XSight. But for anyone interested in reclaiming their office carpet for walking on, as they analyze 40 transcripts, this software can not only declutter the office, but potentially the mind too, and claim back some time for the real thinking. | Q

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IF WE CAN'T DO IT - IT CANNOT BE DONE



By Shaan Rotolo and Kerry Cole

qualitative research

A global consensus

Deciding to expand into new markets is easy. It's deciding how to get there successfully that can be problematic. One of the world's largest providers of IT services was ready to strengthen its presence among small and medium businesses, but needed to understand how the needs of those businesses differed from those of the larger corporations with which the IT provider was more closely identified. Which communication channels would be most effective? What mix of base features would the markets prefer?

What portfolio of services would encourage small and medium businesses to reconsider how they were currently addressing their IT needs? Which delivery models would provide the greatest value - both real and perceived - to customers?

The answers to those and a host of other questions would be critical to success in launching a suite of services in a highly competitive market, and the IT provider enlisted the help of our firm, Behavioral Insights, in answering them. The research team recognized that the real measure of value for the IT firm's research investment would be not only the quality of the information collected but also how well the information was used across the organization to achieve desired outcomes.

IT firm seeks company-wide acceptance of findings from international qualitative project

Editor's note: Shaan Rotolo is principal partner, and Kerry Cole is global research manager, with Behavioral Insights, a New York research firm. They can be reached at shaan@behavioralinsights.com and kerry@behavioralinsights.com.

Acceptance and utilization

One challenge that sometimes arises in doing international studies with large corporations is that of facilitating the acceptance and utilization of results between corporate headquarters and local client teams in diverse cultures. With that in mind, the team used a collaborative approach that often helps organizations to strengthen teamwork and productivity. In essence this process sought input and feedback from local as well as corporate representatives of the IT firm throughout the entire research process. The approach was the research team's solution to ensuring that local markets accepted and integrated the eventual findings.

Behavioral Insights conducted 456 in-depth, face-to-face interviews, targeting a hard-to-reach but important audience of CEOs, CFOs, IT executives and business executives across eight countries. The markets included

New York, San Francisco, Toronto, London, Munich, Berlin, Milan, Singapore, Tokyo and Sydney.

In keeping with the strategic plan for global acceptance of the research results, local staff were included at every step, from formulating questions and discussion guides to assessing responses. Bridging the gap between corporate staff and local managers not only increased internal communication and knowledge but also was important in eliminating the U.S.-centered approach that too often results when U.S.-based companies commission important international research.

Local teams, who ultimately are responsible for implementing the actions that grow out of the research findings, add essential cultural and market-specific perspectives that are available only through those who are intimately familiar with them. The IT company was careful, however, to pull

together people who could make decisions without additional approval, and who would raise important considerations without being sidetracked by less valuable conversations.

Additionally, the collaborative effort increases buy-in of the research across the organization, and decreases the likelihood that local teams will claim global research doesn't fit their markets. Instead, collaboration leads to actionable results that the entire organization can use to meet corporate requirements without sacrificing essential cultural nuances.

Streaming video

Another integral component of collaboration was streaming digital video recordings of the in-depth interviews that corporate and local team members could access 24 hours a day, regardless of which time zone was involved. This offered a number of advantages, not least of which was



Pricing models on a budget

When one of the world's largest providers of IT services was ready to expand its market share it knew pricing could make or break the launch. But a conjoint study across eight countries (Canada, Germany, Italy, Singapore, Japan, Australia, the United Kingdom and the United States) would be prohibitive in terms of both cost and time-to-market considerations. The approach used in this instance allowed the study to be completed much more quickly than would be possible with a conjoint study, without compromising the integrity of the data collected. Time was critical, and recruiting and fieldwork were completed in 13 short weeks.

To solve the logistical problems attendant with an international undertaking and still arrive at valid pricing conclusions, the research team used the Van Westendorp method on a carefully selected group of respondents. Properly administered, the Van Westendorp technique evaluates respondents' price expectations for a given product or service without asking directly what they would pay (an approach that has been shown to be unreliable).

Instead, respondents were asked four questions:

1. At what price would you consider this service to be a bargain (great value for money)?
2. At what price would it start to get expensive (but still worth considering)?

3. At what price would it be so cheap that quality would be doubted?

4. At what price is it so expensive that it would not be considered at all?

This technique was used to provide a broad sense of customers' expectations relating to pricing across diverse markets.

To control for drawbacks that have been associated with this approach, the team recruited respondents who had current knowledge of competitive pricing in the market. Only those who indicated high degrees of familiarity with pricing were selected for analysis.

Before beginning the Van Westendorp battery in interview sessions, researchers provided each respondent with a detailed service description based on product/service features and functionality. This allowed respondents not only to make meaningful pricing assessments but also to more easily compare the new offerings to those of competitors.

Finally, because perceptually-based pricing techniques such as Van Westendorp often assume no barriers to switching service providers, the research team explored in significant qualitative detail the barriers and facilitators related to switching.

The result of this approach? A valid assessment of what pricing the market would bear.

that it allowed more people to participate without incurring onerous additional travel expenses. Those who agreed to view at least three videos online and complete short questionnaires to help process what they'd seen were later invited to participate in online focus groups.

Attendance at traditional focus groups usually is skewed toward middle managers, in part because senior executives don't have time to travel to attend. More junior personnel may have the time, but not the budget or the authority, to participate. With video technology, personnel at all levels and all locations could get a sense of the atmosphere in which the research was conducted, as well as seeing and hearing firsthand what their colleagues and customers were thinking.

Throughout the video process, the research team was careful to maintain security and confidentiality. Sessions were never transmitted over a third-party network, and Behavioral Insights team members kept abreast of

rapidly changing legislation in the countries in which the videos were used. As an example, under Japanese law, respondents' faces could not be shown in streamed video sessions.

Valuable though videoconferencing has become, however, the research team recognized that it could not and should not be used to replace well-conducted focus groups or interviews in the qualitative research process. Instead, video technology was an adjunct to the interviews.

Online workshops

Three weeks after the fieldwork for this project was complete, the research team had prepared preliminary reports. A week later, they began inviting team members from across the IT company's global locations to online workshops to discuss the videos they had seen and the preliminary findings. Researchers gained top management support to encourage participation, but limited invitations to those who had seen the minimum number of videos and completed

questionnaires.

In interactive sessions, the corporate team shared local knowledge that prompted discussions of regional differences and how the global findings could be customized to accommodate those nuances. These discussions also led to higher-order action about how these differences could be leveraged company-wide.

The videos became the catalyst for putting ideas on the table, where they could be assessed from varying viewpoints. The research team was careful to caution participants against making broad generalizations from the relatively few videos they had seen, but also recognized that when such generalizations occurred they could be used to good advantage.

When participants' conclusions were at odds with those of the research team, the team took care to support their claims with evidence from the research. They also encouraged dissent and discussion, while consistently looking for the reasons that data didn't reflect the company's

expectations. The process ensured that the research remained as objective as possible and that it accurately reflected the IT firm's needs and desires. At the same time, it established an atmosphere of trust and understanding among all those involved.

Cross-pollination

The end result of the workshops was a cross-pollination of knowledge that brought greater corporate-wide understanding of the challenges each market would face in presenting the new service portfolio to its customers. At the same time, participants came away with heightened motivation to succeed and some workshop-stimulated ideas on how to proceed.

The success of any cross-cultural global qualitative research project depends on the extent to which everyone involved feels the process is one of internal dialogue and discovery, rather than external diagnosis and prescription. By uniting the diverse, yet complementary, views of marketing and organization science, the research team realigned varying IT company managers' styles and organizational policies into a cohesive entity capable of looking objectively at the data collected.

Removing cross-cultural barriers also helped remove any internal organizational barriers - barriers that too often hinder how research insight is disseminated and applied across the organization. Qualitative research, by definition, about people. The complex human systems involved in any undertaking or organization can be difficult to comprehend, but they are the key to the successful launch of an enduring, productive implementation.

The final component of the project was a senior executive workshop that tied the previous weeks' work into implications that were examined from a broader strategic level. That workshop, conducted a week after the corporate team workshops had been completed, led to a final report that provided the insights the company needed to translate research findings into actions that could impact the bottom line.

In the process, the researchers also learned some lessons. Their advice for future efforts includes:

- Understand the benefits and disadvantages of technology in research, and recognize that no one technology is appropriate for every organization.
- Before showing recorded qualitative sessions, caution viewers about jumping to hasty conclusions. Encourage viewers to consider attributes such as atmosphere, question order and types of respondents rather than making generalizations about the research before data collection and analysis is complete.
- In international research, seek feedback from local as well as corporate markets throughout the scope of the research project, and adopt a culturally sensitive methodology to increase acceptance and implementation.
- Encourage internal dialogue in the client organization and use workshops to help facilitate it. Work

to bridge the gap between local and corporate teams, and build open communication that will ultimately increase the likelihood of success.

- Maintain security and confidentiality when broadcasting anything over the Internet, and stay abreast of the laws regarding data security in each country the research is conducted in.

- Trust the data. Encourage dissent and look for reasons the data isn't what the client expected, but understand that it is often easier for clients to dismiss solid research findings than to examine and accept what the data indicates.

Rich process

Working with Behavioral Insights researchers, the IT firm discovered how to position its portfolio for maximum effect in multiple markets. At the same time, it discovered the rich process of internal creativity and communication that gives any research undertaking its fullest value. | Q



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Watch, listen and learn

How do you know when you have a new product opportunity? Observations can often suggest that new product opportunities are lurking in the collected data. The process of going from observation to insight is not an easy one. It requires a heavy dose of what Edward de Bono (1970) called lateral thinking, moving from rational calculation to imaginative leaps to the possible.

Consumers themselves are not always conscious of what new product innovations would actually address their own wants and needs. They often believe that the currently available product offerings are as good as anyone can find. When questioned directly about their wants and needs, consumers tend to offer complacent clichés - lower price, more per package, different colors - that hardly yield conceptual breakthroughs and revolutionary innovations.

This article describes the types of observations that should inspire researchers to think about the opportunities that may be revealed when we watch people in their roles as consumers. It suggests that people's behaviors may be better clues to what they want and need than their expressed opinions. Ten categories of observations or behavioral clues that should set innovators thinking are outlined here.

- *Observing a pattern of product usage reveals process steps.* When ethnographers pay close attention to consumers while the latter are using a product, the researchers can observe the stages through which respondents go from intention to satisfaction. The steps may begin when materials are assembled and homemakers change clothing as they start a household clean-up, and they end as homemakers admire the shiny results of their scrubbing. The steps consumers go through from beginning to end usually reveal clues to expectations, fears, doubts and wishes.

Using ethnography to spark new product ideas

Process steps in the laundry are exceptionally revealing. Before using their washing machines, consumers go through the task of sorting clothing according to anticipated problems and wishes. Whites are separated from colored garments because of fears about colors running and ruining the whites or because of expectations that white washables need extra attention with chlorine bleach. Some homemakers remove heavily-stained articles of clothing during the sorting process in order to treat them with additional products, such as stain removers or pre-



By Hy Mariampolski

Editor's note: This article is excerpted from the new book Ethnography for Marketers (Sage Publications) by Hy Mariampolski, managing director, QualiData Research Inc., New York. He can be reached at hy@qualidataresearch.com.



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soaks.

Paying attention to the process has certainly yielded more than a fair share of innovations, such as nonchlorine bleach. Continuing to seek possibilities in observations of process can take the category even further. QualiData ethnographers were surprised when a study of laundry practices in Turkey revealed that women, following Islamic custom, separated men's garments from those of women. This observation suggested innovations that could address the needs and expectations of consumers in this market, which were not being met by available brands.

- *Consumers make mistakes.* People tend to blame themselves, Don Norman (1990) has noted, when they make mistakes while using a product. They naively accuse themselves of lacking experience, not reading the directions carefully enough, or just not having enough skill with technology.

Mistakes usually occur when the product does not make itself instantly understandable, when users' stock of knowledge creates contradictory expectations, or when their mental images of the ways things are supposed to work are violated by product operation. These problems with

usability and a readable user interface do not happen only with computer programs, cell phones and VCRs. Consumers make mistakes when they use all kinds of products, and watching these usually provides fuel for new product adaptation and innovation.

Several years ago, when we observed consumers using insecticide baits, we were surprised to watch as they used insecticide sprays at the same time, a huge mistake that in effect deactivated the product. Baits are supposed to work by attracting several ants or roaches to feed in their interior space and then walk out to their nests and contaminate the entire colony with the poisons that adhere to them during their visit to the bait. This operational process confused many consumers whose expectations were for the insects to become trapped inside the bait or to have such a powerful attractant in the bait that many ants and roaches would want to feed within. They also expected that the critters would be dying and injured as they marched back to their nests. The solution was a more easily understandable process for arming the baits.

- *Consumers combine products in novel ways.* When commercially avail-

able products do not perform as expected or do not provide desired benefits, consumers adapt on their own by combining products. When smart ethnographers see this happening, they should sense an opportunity for line extensions and product innovations.

When we were watching consumers clean their counters and floors several years ago, we noticed something interesting: Homemakers were adding household bleach to their accustomed cleaning products. One woman combined liquid dish detergent with chlorine bleach to clean cutting boards and tabletops. When ethnographers probed for the respondents' goals and intentions, the response was not surprising, considering the context. Recent news reports had been filled with dire warnings about bacterial contamination of food preparation areas. Chicken infected with e. coli bacteria had recently sickened several people and homemakers were paying close attention to news reports recommending bleach as a way to reduce the possibility of contamination.

The deeper understanding that emerged from these observations made it clear that consumers were seeking antibacterial benefits. Until that point, antibacterial products were a relatively small niche, confined to infant care or associated with sick-room clean-up. A soap marketer had recently introduced an antibacterial product promising enhanced deodorant benefits. Our observations convinced the client that a broad spectrum of products promoting antibacterial outcomes could capture considerable consumer attention. Moreover, the client's brand equity and product formulation already were consistent with the sanitizing benefits consumers were seeking. They had only to remind shoppers that products currently available for cleaning countertops and floors had the antibacterial benefits they wanted.

- *Consumers use home remedies or cre-*

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ate products. If available products do not satisfy consumer needs, some creative homemakers invent their own solutions. They might have some extra facility with wire coat hangers, rubber bands, and folded paper; they are sometimes inventive with cooking ingredients or cleaning solvents. Regardless, they like to show off when ethnographers come to visit, and their products provide clues to imaginative marketers who can commercialize these inventions.

Home barbecuing is a category that seems to release inventiveness. Entire regions of the United States, not to mention the male half of the human species, appear to take unusual pride in their grilling skills. Ethnographers observing a home barbecue during a lazy summer weekend are usually treated to a host of native inventions: a favorite ingredient such as brown sugar, pickle juice, wine, or Worcestershire sauce in a marinade; special woods, such as mesquite, gathered in the backyard and added to the charcoal for smoking or enhanced flavor. In several homes, we watched men start their fires by placing their charcoal along with some strips of paper into an empty coffee can with holes punched into the bottom. This adaptation appealed to consumers who wished for a safer nonchemical means of starting the fire. Most of the observations reviewed here have been turned into viable and profitable product innovations.

• *Observing usage reveals benefits you did not know about.* The consumer's experience of product benefits is highly subjective, a psychological state shaped by factors as diverse as personal expectations, product features, brand image and life stage. Like all qualitative researchers, ethnographers are challenged to understand the consumer's personal experience of product usage and to shape innovations around those feelings and emotions that constitute benefits.

Prior to conducting research for the Moen Revolution shower head, we believed that the benefits con-

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sumers seek in the shower we're both functional – for example, cleanliness, thorough rinsing, hair and skin care – and psychological – a state of relaxation. Careful observation of showering and extended interviewing about associated feelings added to a deeper understanding of the psychological dimension. We had severely underestimated the emotional benefits sought in the shower. Soaking, interaction with water in isolation, and the state of nakedness we're relaxing to some and invigorating to others. Respondents we're observed praying, meditating and inhaling steam deeply as though they we're involved in aromatherapy. Despite confined circumstances, they lingered in the shower as though they we're involved in a purification ritual. The end result of our thinking about what we saw was an advanced showerhead design that appeals directly to the emotional benefits sought in the daily shower.

- *Observing usage reveals frustrations or complacency about results.* Consumers reveal themselves most acutely sometimes when there is a divergence between verbal expressions and body language or when what is visible to the ethnographer is contradicted by what the respondent says. In either case, we have clues to new product opportunities.

We have seen this repeatedly in observational studies of home cleaning. As a homemaker completes her scrubbing of the bath and shower area, stains and caked-on particles of

soap scum remain fixed on the tile surface. Her unhappy frown, slumped shoulders, and distracted glance disclose more than what she says: "It's OK; it's done." Putting up with unsatisfactory results suggests that new approaches to solving problems of daily living are warranted. The homemaker may feel that the effort has been committed and that products work as well as can be expected; she may not want to achieve some ideal of perfect cleanliness.

Nevertheless, the product innovator should not confuse complacency with delight. Just because complaints are not verbalized does not mean that the customer is satisfied.

- *Observing usage reveals a division of labor.* When the tasks associated with everyday life are divided by social category, we witness some underlying assumptions and attitudes toward those responsibilities. Particular tasks may be assigned to children instead of adults or to men rather than women. Some jobs may be reserved for a professional such as a plumber or dry cleaner; others may get assigned to someone expected to supply regular services within the household, such as the gardener or carpet cleaner. Whenever we witness this division of labor while visiting a site, the ethnographer's imagination should start exploring marketing opportunities.

When consumers expect that a problem can be solved only by an expert, they are betraying the belief

that current formulations do not have the requisite strength or tenacity. Following such observations, some brands have created "professional strength" line extensions. When a father assigns some cooking responsibilities to his son, it often means that they want to share a feeling of mutual accomplishment and shared success, to create common memories along with a meal.

- *Observations reveal a location for product use.* One of the pleasant surprises that greet ethnographers when they visit a home is discovering just where certain products "live" in the household. An indoor product may have moved outside or to the garage. Kitchen products end up in the bathroom and vice versa. Items destined for the playroom end up in the bedroom. Consumers simply defy the rigid confines that marketers often have in mind for product usage patterns. Observant research innovators should pay close attention to these shifts in location because they betray mindsets, expectations and unverbally needed needs that can lead to successful new products.

In a recent ethnography regarding paper products in the home, for example, we witnessed that large formal dinner napkins had migrated to the bathroom. Homemakers concerned about spreading germs were avoiding the communal cloth towels of yesteryear, yet paper guest towels were expensive and too inconvenient to purchase. Observations such as these offer rich opportunities for line extensions.

- *Consumers adapt packaging or shift containers before use.* Observations of the ways in which products are manipulated before being dispensed or applied are important indicators of new benefits and uses that consumers are seeking. When consumers adapt packaging formats and materials, designers and developers should be alerted to potential new product innovations.

As they prepare and store meals ahead of time for their highly active

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and mobile families, homemakers create different-size portions for the various members of their families. Some frozen-food manufacturers have appreciated the benefits of offering products that reflect consumer practices of portion control.

Similarly, it is interesting to observe how consumers reuse the various types of squeeze and spray bottles that arrive in their households. In the laundry, they may use an old mustard dispenser for dabbing on bleach in a manner that focuses the product on stains without splashing. They may adapt smaller packages for distributing the giant-size products they buy at warehouse superstores such as Costco, for example, using small plastic baggies to contain workable tabletop supplies of napkins. Astute marketers should always think about the potential for innovations in packaging and dispensing.

- *Consumers share wishes that they regard as unachievable.* Listening to consumers share wishes for the dis-


tant future while watching them use currently available products is rife with promise and opportunity. Somehow, the act of free association while engaged in product use releases imagination and grounded thinking. Consumer wishes may seem utopian and unachievable, but these ideas should point innovators in the right direction.

Watching people with diabetes use blood glucose monitoring devices gives the ethnographer insights into the swirl of emotions associated with the product. Concerns about a potentially debilitating chronic disease, desires to maintain dietary discipline and self-control, worries and inhibitions about the act of pricking your finger to draw blood, anxieties about the capabilities of technology to support health maintenance objectives – all collide as the product is being used. At times like this, it is not unusual to hear patients wishing for “bloodless” glucose monitoring devices or for devices that would operate passively and keep better

records. The moment of direct confrontation with a product is pregnant with possibility.

New possibilities

This article has reviewed a series of ethnographic moments that should be of particular interest to new product developers. When consumers are exhibiting a process of usage; when they make mistakes, combine products, or invent new ones on their own; when they reveal new benefits or complacency and apathy about results; when they divide up household responsibilities in curious ways or bring products to an unanticipated location; when they shift packaging or dream about possibilities while stuck in the present – all of these should be clues that alternative solutions, new possibilities and creative new products can satisfy consumer wants and needs. It takes insight and imagination to go beyond basic observations of behavior, but the effort can be amply rewarding. | Q



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How to be a better client

Have you ever thought about how you would rate if your suppliers graded you as a client? Ever speculate on what your suppliers are saying about your skill at managing projects and supplier relations? If you are a supplier, have you ever wanted to tell your client how they could improve as a client? More importantly, how do the answers to these questions impact your ability to maximize the value of your research projects?

An interesting phenomenon is taking place in the world of market research: A knowledge shift is occurring. I come to this realization as I finish a four-year term on the board of the Qualitative Research Consultants Association (QRCA), including a year as president of the QRCA. This experience has given me a much broader view of the industry, as has my attendance at conferences this year with five different market research associations.

Some industry trends that I learned about at these conferences got me thinking about client-supplier relations. Now more than ever before, many research suppliers have greater experience and knowledge about research and the research process than do many clients. This is a product of corporate downsizing that has seen the elimination of many experienced, senior research manager positions. This has spawned an environment where research suppliers are often in a situation where the buyer is less knowledgeable about research methodologies than the supplier.

If you buy or contract for research, especially qualitative research, please read on. This is for you, the research buyer or end user of the research. (If you are a supplier, I invite you to share this article with your clients.) As a client, you are continually making decisions about what supplier to use, whether they are meeting your needs and are a good fit for your organization, etc. Many articles have been written about what to look for in a qualitative research supplier. However, I have seen none written about how to improve the client-supplier relationship by being an even better client.

Why is it important to be the best client you can be? Simply because the better the business relationship between client and qualitative researcher (QR), the easier it will be to work together over time, as QRs will be better able to anticipate client needs and desires and maximize the value they can add to the client's

15 keys to a successful relationship with your qualitative researcher



By Diane M. Harris

Editor's note: Diane M. Harris is president of D.M. Harris Associates, a Butler, Pa., research firm. She can be reached at 724-283-6080 or at dmharris@zoominternet.net.



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enterprise. In addition, building a long-term, trusting relationship will provide more efficiency for the client, in terms of both time and money.

A client's actions or inactions can have a big impact on both the quality of the research product and client/QR relations. Making sure that a QR has everything they need from you as a client will optimize both the effectiveness of the research and the QR's ability to add maximum value



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Be a good client

With those thoughts in mind, I have asked some of my most experienced and respected colleagues, both within and outside of the QRCA, for their thoughts on what makes an ideal client. Through the compilation of their input as well as my own personal thoughts, the following are 15 tips on how to be a great client:

1. In the field of qualitative research there are consultants and there are moderators. It is important for you to know which you need and how your QRs view themselves. Consultants prefer to be involved in all stages of the project from design to presenting findings with actionable recommendations. They truly want to team up and consult with you to strengthen your research outcomes. Moderators are more interested in simply doing the interviewing and maybe writing a report of the findings. You will be more effective if you first decide which you need to hire. Ask potential QRs which category they fall under and, if they are capable of doing both, whether they prefer to act as a consultant for an entire project or only moderate.

2. Be clear about your research objectives and intended use of the findings and present them in writing when the RFP is given to the QR. It is extremely helpful to know ahead of time who is going to use this information, when and for what purpose. Do not be afraid to ask your end user (brand manager, product developer, etc.) how they intend to use the findings as this will help you identify and design the best research methodology. A great client will take the time to clarify and share with the QR the stated project objectives as well as the hidden or sidebar agendas which most projects always have, e.g., "While we're doing these groups on strategic positioning, the ad agency wants to show this new idea." This helps with time management during the interview to know in advance what the issues are that the client is paying to discover, versus the information someone in the company or team

wants "for free."

3. Once you have established the objectives and use of the research with your internal team then you are prepared to call QRs. If you are unsure of what or how to achieve your goal, consider calling one trusted qualitative research consultant to help you think through the following questions. Ask yourself and your end user these questions and put the answers in writing in your research request:

- Which type of research is most appropriate for the project: qualitative, quantitative or both?
- Who will be the respondents and in what incidence do they occur in the geographic area where the interviewing will take place?
- Where and how will the research be conducted?
- How many interviews will be minimally needed?
- What is the budget?
- When is the data needed? In most cases, the more time to plan, the better the results.
- What stimulus or background material will be needed? Provide the stimulus material well ahead of time. Providing the QR relevant background documents helps place the project in a broader context and allows them to play the more important role of consultant rather than moderator. Too many projects have had to be postponed because the creative, prototypes or concepts were not done on time.

4. Allow enough time to do a project right. We all know many projects happen on the spur of the moment. Even so, allowing enough time to plan, recruit and execute will save money and time in the long run. There will be fewer mistakes that need to be corrected and you'll be much less likely to lose important information. My years of experience in the research industry have shown me that haste can truly create waste.

5. Permit the QR access to the end user of the research. A skilled qualitative researcher will deliver more insights if they are able to first interview the end user and ascertain all the nuances of a project prior to writing

the discussion guide. This minimizes the risk of information not being uncovered and the risk of the QR saying later "If I had known _____ ahead of time we would have done things differently."

6. Respect that the QR may have more qualitative research knowledge and experience than you do. Take advantage of their knowledge and experience to benefit your project. This is especially true if they are a member of QRCA and have attended the annual QRCA conferences as they have sought out the latest thinking in the field of qualitative research which they will be able to bring to your business. Similarly, let the QR make suggestions about methodology prior to fielding the research.

7. Treat your QRs as business partners. Even though they don't have an office in the cubicle down the hall, most qualitative research consultants want to establish a working relationship that is built on trust and respect. The ideal client works with the QR on the project schedule, respects their opinion, and is honest with a QR about shortcomings or why they might have lost a given project. The respected client will coach QRs on the company's culture, helping them to look good to others in the company just as the QR is working to make the client look good by delivering excellent research.

8. Be flexible. If you've spent any time in market research you know things change in a minute. A researcher has to live life on their toes and be able to change in a moment's notice. Expect it of yourself and your QRs.

9. Be honest. It will benefit you and the research if you tell QRs what you know and don't know, and leave your ego behind. Remember qualitative researchers are skilled at reading people and can tell when you're faking it, so come clean if you feel overwhelmed. A professional consultant will respect and appreciate that honesty and help you even more. For example, if management wants you to do something you've never done before, having that infor-

mation will help the QR know at what level to start their work for you.

10. Be reasonable and fair. Not every project goes smoothly and when you least expect it, things will go wrong. They are often out of anyone's individual control, e.g., respondents lying about their usage habits just to get in the group. Great clients work with the situation and reveal their true character in disaster man-

agement. They recognize the pitfalls of the industry and strive for perfection, but at the same time are realists. Rather than trashing a QR, work through problems so your relationship and understanding of how each other works will deepen, thus building a reliable team for your business.

11. Give feedback voluntarily. Give it constructively and have the motivation to help the QR grow as an individual. It probably is part of your



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job to have dependable research QRs at your fingertips, so why not spend time developing those with whom you feel a measure of comfort? Most clients get formal performance evaluations from their superiors on an annual basis so they know where they stand and can set goals for their future growth. Most qualitative researchers work alone or in a small group. There are few opportunities to formally obtain feedback. Recognize the need for these independent QRs to know where they stand with you, to hear constructively whether or not there are opportunities for them with your business in the future, and what they need to do to win your business.

12. Keep the passion for excellence on the front burner. Weave this passion through everything you do and do not settle for "good enough." At the same time, recognize we're all human, so expect growth, not perfection. The research will be better, and you and your QR relationship will grow because of it.

13. Pay out-of-pocket costs up

front. This is an increasingly difficult problem for QRs as incentives, especially for projects with professionals like physicians and executives, have gotten very expensive. It is important to recognize that most qualitative researchers are small, independent business owners with limited cash flow for up-front project costs, i.e., incentives, travel, facility rental and recruiting. Most, if not all, of these costs are required to be paid before the interviews actually take place. Some excellent qualitative research consultants have had to take out second mortgages to establish a line of credit to front these costs during very busy times amid exceptionally slow payment by clients. Therefore, a responsible company will recognize it is their responsibility, not the QR's, to advance payments for these costs. Please be an advocate within your company for the small suppliers.

14. Pay on time. If you're a large company, your accounts payable department may not know the qualitative research supplier is a very small

business and needs special consideration when being paid. Holding payment 31 days or longer is unacceptable and in the long run the client will incur more costs because QRs may build in carrying charges.

15. Last, but definitely not least, keep your sense of humor. The business of market research can be unpredictable and having a sense of humor may be your strongest asset.

Strengthen relationships

So what's your grade as a client? I hope you've found this perspective useful and that it will help you to strengthen your business relationship(s) with your qualitative research supplier(s). The bottom line is that the results of your research projects will be better for it. I would like to thank you on behalf of all independent qualitative researchers (at least 3,000 strong) for the opportunity to help you maximize the value of your research resources by helping supplier relations be the best they can be. | Q

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Find out if success is in the cards

When developing and optimizing concept statements for quantitative screening, a number of alternative statements typically are written internally by the client, its advertising agency or a marketing or new products consulting firm. These approaches are then exposed to consumers for their reactions and suggestions. Those that seem of greatest interest are selected, optimized and tested. This is an efficient way to screen ideas: it yields definitive “yes” or “no” responses as well as getting at the “why” behind responses. Such exposure is usually done through a series of focus groups or one-on-one interviews. This approach helps to validate the new ideas or concepts and find ways to improve upon them, so that only the “best” concepts move on to the quantitative stage of testing.

As a qualitative research consultant I am often asked by clients – that is, companies that will be manufacturing the product or offering the service – to help in this development and optimization process. Too often, I find that a number of concepts have already been written so that consumers in the study are being asked to respond to statements which are typically too long, written with too much detail and are too ad-like in style.

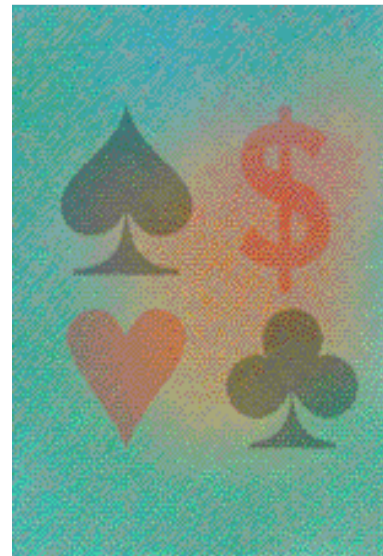
A case in point is a study for which I was asked to conduct focus groups for a new toothbrush. Ten individual concept statements (one was an alternative version) had been developed by a marketing firm. Each had a headline that introduced the product by mentioning the manufacturer with a catchy-yet-descriptive name for the toothbrush, and which was

modified by a descriptor such as “the first,” “breakthrough,” “revolutionary” or “next generation.” A line below summarized the benefits of the particular brush, and was followed by the body copy, which consisted of two paragraphs: the first stating the particular problem the new toothbrush would overcome, the second describing the brush and how it works. Each concept statement was accompanied by a detailed drawing of the proposed

new brush.

Nine fully-developed statements is a lot for consumers to digest, particularly within the confines of the standard two-hour group! But even if we were to conduct longer sessions, as many of our European colleagues do, such statements, packed with detailed and complex ideas, are overwhelming. Consumers may be able to express general likes and dislikes about the ideas and the language and can help us to understand and (perhaps) modi-

A qualitative approach to consumer-based concept development



By Judith Lerner

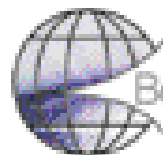
Editor's note: Judith Lerner is principal, Consumer Insights for Marketing, a New York research firm. She can be reached at 212-989-8912 or at judith.lerner@post.harvard.edu.



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fy the statement for optimum appeal. However, if each concept is too dense, anything more than immediate, superficial reactions is impossible. Most consumers lack the energy and motivation to respond with the necessary detail that we as marketers and researchers require. Even if the number of concept statements is reduced, such methodology invites consumers to be reactive – they can express what they really like or dislike but not what they really want. Further, there is the danger of locking them into what is being offered by a particular concept.

In their own language

Over the years, I have developed and used with different clients a means to build concept statements with consumers to get at what is truly important to them and be able to express it in their own language. This approach is completely exploratory. Prior to the groups, my client decides on a list of attributes and benefits (as words or phrases) that have been determined from one or more sources: trend analysis, prior market and consumer research, R&D capabilities, internal brainstorming. Each word or phrase is handwritten on a white card and each is exposed individually to the group. Based on the groups' responses, the cards are sorted for relevance, appeal and similarity. Participants are encour-

aged to modify what is written on the cards as well as add their own desired attributes and benefits to include in the sort. That the original words or phrases are handwritten encourages spontaneity and creativity as participants see the process as fluid and experimental. In the course of this exercise, the underlying emotional, rather than only rational, reasons for the sort (i.e., why a particular attribute is consigned to the reject/not relevant pile or why a particular benefit makes it to the accept/highly desirable pile) can be probed. A second sort might further refine the "accept" pile and a ranking of the selected words and phrases reveals what is most important and appealing.

The process is constructive, as each succeeding group builds upon the sorting outcome of the previous one. Attributes and benefits that did not do well in one group can be eliminated, remain in the mix for another try, or be exposed in their consumer-modified form; those in the backroom can add additional words and phrases as ideas are sparked by the responses of the group participants.

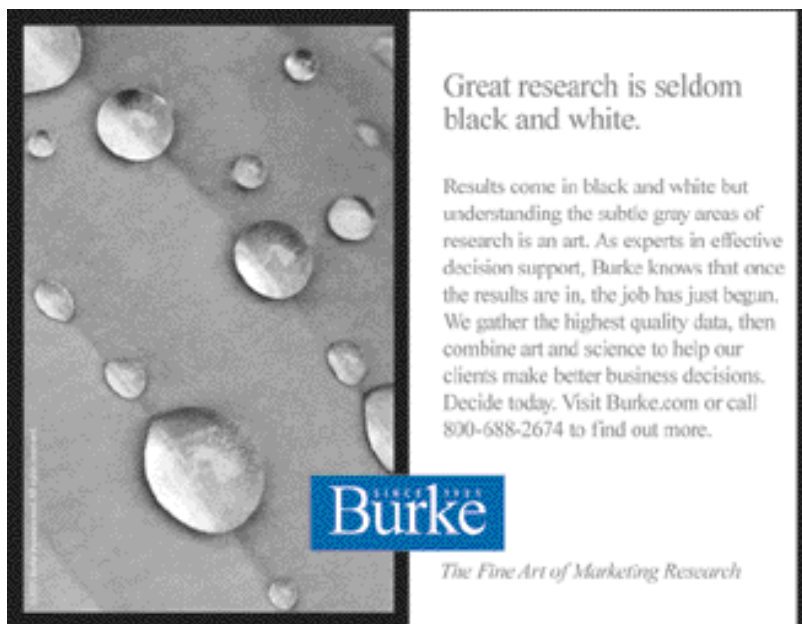
The outcome is a series of ideas for concepts or positionings in consumers' own language which ensures that the statements are understood and are meaningful. At the end of each session, a series of rudimentary concept state-

ments can be assembled by physically putting together some of the winning elements (e.g., "[Brand or product name] is the one [category to which it belongs or type of product] that offers [consumer end benefit]" along with other language to be used in the body of the concept). The concept or concepts that emerge from this process can be made more concrete, tweaked and tested, with the knowledge that the inherent ideas originated with consumers.

Staying in the oral care arena, for the development of a whitening mouth rinse, users of tooth whiteners and mouth rinses built a whitening mouth rinse concept through a series of attribute/benefit statements. Following a discussion about their attitudes towards tooth whitening and usage of whitening products, these consumers were shown each statement one at a time, with exposure of each card grouped according to relevant categories (e.g., "sensory," "whitening," "cosmetic/therapeutic," "reassurance"). The statements were rotated within each category to prevent order bias but the categories themselves were presented in the same order to each focus group. After seeing the individual statements in each category, consumers chose the statements that appealed most and ranked them; when they had selected and ranked the statements in all the categories, they selected from the different categories those statements that fit best with each other. This yielded some embryonic new-product statements from which my client was able to develop several concepts for further screening. The process also revealed those attributes and benefits, along with specific wording, that resonated most with the potential consumers of the product.

Used for existing products as well

While the example just given was for a product that did not yet exist, this same concept-building methodology can be used for existing products that need to be positioned or repositioned. A European candy manufacturer wished to introduce to the U.S. market a breath freshener that, because of its flavor and packaging, had a feminine



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aspect, and the company felt it could not use the European positioning. First, focus groups were conducted among the target (women who typically use small hard candies or breath mints) to explore attitudes and usage towards the category and to elicit reactions to a description of the product, its packaging, and, finally, to the product itself. Based on these responses, a series of descriptors/attributes and benefits were developed for a second wave of research, the concept-building phase.

Women with a similar profile were given the product to use for a week while keeping a diary about their experiences. In a series of individual interviews, each woman discussed her reactions to the product's appearance, packaging, taste and related issues. Those who rated it highly were asked to sort the statements (arranged in such clusters as taste, packaging, overall experience/uniqueness, and usage occasion) by appeal and product fit, and to then rank order the selected statements. In this way, each consumer built her own product positioning based on her experiences and perceptions. As a result of this consumer input, my client was able to develop alternative positionings for this breath mint.

Real influence

When we invite consumers to give us their time to participate in a research program, we tell them that this is a way for them to have a real influence on the products and services they want and use. Using the method described above to develop and refine concepts truly allows it to happen. Further, consumers enjoy the exercise for its creativity and because they immediately see that they are directly influencing product development and communications. For marketers, this method provides insight into the psychological bases of the category and its associated benefits, as well as ensuring that the concept or positioning will be meaningful to consumers - that is, it will describe a product or service that they want in language that they understand. | Q



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The metamorphosis of a qualitative researcher

Like many in the industry, I have shifted responsibilities from quantitative to primarily qualitative work. As I transform into the role of a qualitative research consultant (QRC) at M/A/R/C Research, I begin this path by confirming the notion that I have a knack for qualitative research.

Take a look at the definition of the word:

knack *n* : 1. A clever, expedient way of doing something. 2. A specific talent for something, especially one difficult to explain or teach. 3. A special skill, talent, or aptitude.

Some of those descriptors - “clever,” “specific” and “special” - describe the very nature of qualitative techniques. Interviews with a variety of qualitative experts provided rich insight to this notion and, ultimately, a list of primary characteristics of those who possess the qualitative knack. (Note: The term QRC is used to cover the full spectrum of qualitative work, not just interviewing and moderating.)

With qualitative research on an upswing in the research industry (based on U.S. market research spending, the segment grew by 3 percent and 6 percent in 2003 and 2004, respectively, according to *Inside Research*, May 2005), companies are finding more qualitative projects on the table and, consequently, are seeking expertise in qualitative design, interviewing/moderating, and analysis. The typical research department is more likely to have trained, in-house moderators than ever before. According to RIVA

Part I: Do you have the knack?

Training Institute’s Executive Director H. Grace Fuller, seven of eight students in a typical training session represent corporations versus independent moderators, a reversal of the proportion 20 years ago.

Based on my qualitative experience at M/A/R/C thus far, the company feels I am cut out for a specialized qualitative role. I lean on the experts in the field to help me determine if this is my correct path, and by sharing this information, perhaps I can help others determine if they also have the knack.

It’s about people

When describing the characteristics of a good QRC, most are linked to an interest in people. Accordingly, if you are a “people person” you also have a deep respect for others. Fuller shares the RIVA philosophy: having a deep respect for people is the basis for every interview. If you genuinely possess this characteristic, respondents will open up to you and reveal their true feelings and opinions.



By Kelly Heatly

Editor’s note: Kelly Heatly is research manager, M/A/R/C Research, Irving, Texas. She can be reached at 972-983-0452 or at kelly.heatly@marcresearch.com. This article is the first of a series that will track Heatly’s progress as she enters the world of qualitative research.

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Other QRC-endorsed characteristics of moderators stemming from a deep interest in and respect for people include the following:

Intense curiosity

Someone with a knack for qualitative research wants to see beyond the statistics: why people say what they say and do what they do. Even those experienced in quantitative research discover the knack and gravitate toward qualitative research due to strong curiosity about the people behind the data, the depth of their responses. Judith Langer, senior vice president, GfK/NOP Worldwide and author of *Behind the Mirrored Window*, describes her early career in quantitative research: “I felt like a misfit. The numbers didn’t ‘talk’ to me. I often felt frustration. Life doesn’t seem to fit into such easy boxes.” This intense curiosity drew her to interviewing and moderating, where she fulfilled a “strong need and drive to get into other people’s skins and ask, ‘What is it like to be you?’”

Unconditional positive regard (UPR)

Renowned psychologist Carl Rogers’ UPR concept is commonly applied to qualitative research and describes an interviewer’s objective, non-judgmental reaction to the respondent, regardless of personal opinions. Jeff Walkowski, principal of QualCore.com and president of the Qualitative Research Consultants Association, explains the importance of UPR when interviewing: “We may not like what we’re hearing, but we need to respect the respondent. You can’t bristle.” Conversely, you can’t reveal a “spark in your eye” when you hear something favorable. “Everyone is equal. Put on your poker face. You need to keep your ego outside,” Walkowski says.

Patience

Qualitative interviews use patience when drawing thoughts and opinions from respondents, especially the non-talkers and the non-stop talkers. However, the turnkey qualitative process requires patience throughout. Walkowski believes you need

“patience all around” – with respondents, with clients, and with yourself. Given the complexities of collecting qualitative data and the “messy” nature of the data itself, a patient approach to design and analysis is necessary to nail down the client’s objectives.

Good communication

Being interested in people goes hand in hand with having good communication skills, essential to the interviewing process. QRCs are good at two-way communication – asking questions and listening – not just with respondents but with clients. Written communication is also a key characteristic in the reporting and analysis phase, given the complex nature of qualitative information.

Flexible

In addition to possessing “people” qualities, those with a qualitative knack can not only handle the lack of consistency across interviews and projects but they also thrive on variety and discovery of the unknown. Specifically, they are flexible and think quickly on their feet.

Qualitative work often ebbs and flows, resulting in a hectic schedule with sporadic bursts of travel followed by days behind a desk. Undoubtedly, QRCs often find themselves working odd hours away from home. Langer describes qualitative work as a “vagabond lifestyle” despite the trend toward online and telephone focus groups. Those with the qualitative knack accept this lack of routine and have the stamina to accommodate a non-traditional, ever-changing schedule.

Think on your feet

Due to the complexity of people, each interview or group has a unique dynamic and outcome. Therefore, interviews are comfortable facing the unknown aspect of each interview and can adjust accordingly to meet the research objectives. Walkowski points out that interviews may be forced to try something they have never done before, which requires tremendous creativity and confidence. Confidence makes it possible for a QRC to be

comfortable working within a loosely defined process and changing a plan on a moment’s notice.

Proactive consultant

While all of the above characteristics are somewhat unique to the qualitative segment, QRCs are still required to be good consultants, regardless of research methodology. Carol Stuckhardt, director of custom research at Hearst Publishing, relies on the QRC to listen to the client’s objectives and provide a special “angle or viewpoint” that will make the research better. In addition, a good QRC should effectively manage client expectations throughout the process.

Psychologist-journalist

When asked to compare the characteristics of a QRC to those of other fields, the various experts I interviewed mentioned a psychologist and a journalist, the former more interpersonal than the latter yet sharing the common goal of gathering in-depth information from people.

Dr. Jean-Claude Wakim, clinical psychologist and assistant professor at University of Texas Southwestern Medical Center, describes a good group therapist as having three basic skills:

Active listening: “People don’t always say what they mean, so you must hear every word and decipher what they say,” Wakim says.

Reflection: Say what was understood then confirm the meaning. In other words, the psychologist repeats the message in his/her own words then clarifies the content of the message with the respondent.

Directing the traffic: In group counseling, the psychologist must clarify one person’s statement before moving to the next, occasionally interrupting a gregarious person or encouraging a shy one to talk.

Bob Lederer, founder of RFL Communications, Inc., and publisher of research industry newsletters, shared the primary characteristics that make up a good journalist, echoing the same qualities that make up a good QRC:

Intense curiosity: “You have to dig and be curious and never be totally

satisfied with what you came up with,” Lederer says.

The ability to think on your feet in an interview: In pursuit of the best story, “You must be quick on your feet in all ways and ready to switch gears very quickly.”

Creativity contained within objectivity: Lederer believes good journalists use their own opinions to breed creativity yet know how to repress those same opinions and remain objective during the interview process and in the final summary.

Ingenuity: Good journalists find the respondent’s hot buttons in order to extract the information necessary for an interesting story.

Are the characteristics and skills of a psychologist and a journalist any different from those of a professional interviewer or moderator? Certainly, a qualitative interviewer can apply the same characteristics and skills despite differences in interview objectives.

Skills can be learned

Based on the above characteristics, I

feel that, overall, I do have the qualitative knack, though some characteristics are stronger than others.

Fortunately, those in my situation who feel they are lacking key characteristics can acquire specific skills through learning. According to RIVA’s H.

Grace Fuller, once you determine you have a deep interest in and respect toward people, you can then be taught the skills that make up a good QRC. Fuller explains that it is critical to “put knowledge skills into body skills.”

Knowledge skills are learned “from a book” and through experience while body skills are acquired hands-on through practice. She uses an analogy: “You can learn the theory of music without actually knowing how to play the violin. This takes practice.”

Similarly, Wakim emphasizes the difficulty of teaching psychology students to master active listening, reflection and clarification, which, in his opinion, can only be effectively learned through two to four years of supervised practice, a “learn by doing” approach.

Know your knack, find your niche

Convinced that I do have the qualitative knack, based on the characteristics above, I draw from a solid foundation of experience from graduate school studies at University of Texas at Arlington, individual depth interviewing at M/A/R/C, and observing my colleagues. As I strengthen specific qualitative skills through learning and formal training, I know I can become a successful qualitative researcher by finding a niche role: research design, interviewing/moderating, analysis, reporting, or all or the above.

So here I am at the onset of my journey from quantitative to qualitative research. I’m going to take some advice from RIVA and use courses to help reinforce the experiences, learn new skills, and unlearn bad habits. I’ll keep you posted as to my progress, so you can witness the metamorphosis and gain insight prior to following your own path, should you decide that you, too, have the knack. | Q



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Perceptions and realities

There are few things more frustrating to the ethnographic market researcher than watching reports from ethnographic fieldwork sit on the shelf while development teams and executives work from assumptions without the benefit of understanding users. This is, in many respects, a product of how we learn to conduct and present research. Conducting ethnographic investigation for business means adapting to the expectations and styles of corporate culture.

Video has been used for many years to analyze and report data but has frequently taken a backseat to the lengthy, written report. If we are to see our research implemented and more extensive research employed, then video should take center stage. Video transforms how our findings are viewed and implemented. While video cannot and should not eliminate the written report, it should have a greater role in the tool kit of the researcher working in the corporate environment.

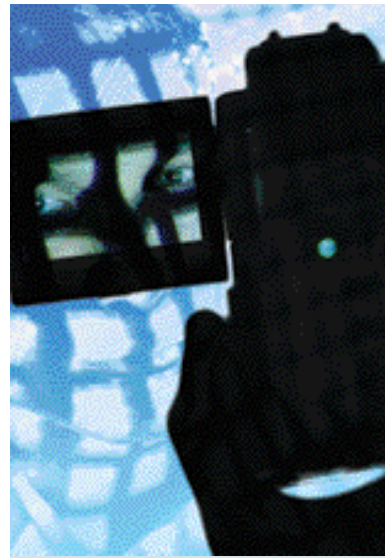
Whether we conduct fieldwork for clients as a consultant or as professionals inside an organization, we use a range of different strategies in an effort to effectively communicate our findings, or to persuade developers, executives and others to take into account the perceptions, motivations and needs of consumers when making decisions about products or business directions. Many of these strategies develop out of trial-and-error encounters as we learn how to make ourselves heard and understood.

Sadly, our work is often ignored as key stakeholders remain ensconced in their offices, never to change their perceptions or convictions. Equally common, the people we most need to persuade with consumer insights are those who are the most skeptical of our methods and findings. As such, the question becomes: How do we persuade them of the necessity of understanding the consumer?

We can start by taking our own advice and recognizing that lengthy reports produce indifference, rejection

and sometimes outright hostility from our employers. In our media-rich culture, the convention most people are used to for persuasion about contested issues and the reporting of human experience is not print. Our clients don't read anthropology journals, they often don't even read the editorial page - they watch TV. When they do read, they scan. And the executive summary on your latest field study report is never going to give people the richness of detail or direct experience

Thoughts on the role of video and ethnography in marketing research



By Gavin Johnston

Editor's note: Gavin Johnston is lead ethnographer at Ethnographic Research, Inc., Kansas City, Mo. He can be reached at 816-931-7772 or at gavin@ethnographic-research.com.

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with users that you need them to have to change the direction of their project or their business.

Of course, video ethnography has some obvious advantages and disadvantages. While unethical editing can easily skew data and partially control the transferred “reality” of events, primary experience with research participants on video can be far more persuasive than summarized bullet points. Unlike a paper transcript, video conveys emotions such as anger, disappointment, uncertainty and enthusiasm clearly. It often presents user pain points more objectively in the eyes of the clients. Users are given a human face. And our client’s decisions are shown to impact real people in tangible ways. The effort required to sit and watch a 10-minute video on the corporate intranet is less than that required to read and understand a large ethnographic report. Captivate in the beginning and they will be considerably more likely to turn their attention to the final text.

If video manages to carry the “objective observer” narrative voice of a documentary, our own objectivity and credibility as researchers will be preserved. Stakeholders can walk out of a video presentation and use fact and example to argue with their co-workers about user needs and behavioral processes. Video presentations inject specific people and their

experiences into sometimes hopelessly generalized discussions about “what users want,” and “how users work.”

In past work conducted for Fortune 500 companies, video presentations drove people to delve into the larger written reports. Without video, the reports were typically neglected. Simply, most corporate employees will not print out and read anything of length, regardless of the quality, levels of insight or significance.

Obviously, we never want our video summary of findings to turn into entertainment, or our attempts to create a compelling presentation of findings to overshadow the findings themselves. But if the screening of our mini documentaries helps push a development group or a strategy in a more user-informed direction, that’s a good thing.

Risks: art vs. science

The use of video and film in user business-related ethnographic data collection should lead the way in understanding and developing more complete pictures of user-centered design, customer-focused products and services, and customer behavioral patterns. Unfortunately, the methodology has sometimes been disregarded as too expensive, too subjective, or not reflecting “real science.”

It is not uncommon for a

researcher using film in data collection to run into people concerned with the validity of the method. Sometimes the concerns revolve around whether film and video are art or science. Because of its interpretive, creative, impressionistic and emotional attributes, art is sometimes assumed to be in direct conflict with an objective, value-free “science” – apparently creating an unavoidable conflict between the goals of film as art and user research as science.

Consequently, people – academics and professionals alike – assume limited possibilities for film. Film as a serious analytical resource has remained fairly marginal.

Film is sometimes seen as a humanistic pastime, not significant scientific work. It is meant to appeal to the audience’s emotional pliability. Ultimately, the producer of the final visual document is seen as selectively building subjectively constituted data and constructing a piece that reflects his/her interpretation rather than “the facts.” However, the same can be said for any written document, particularly when behavioral research methods are applied to data collection for a specific task or client need. A logocentric culture prevents researchers from benefiting from the full breadth of insight and information available, treating video as if it has less validity than the written word. However, written reports often have pictures, films often use written narratives, subtitles or intertitles. They always have accompanying written material. The reality is that while the film-focused researcher does indeed run the risk of compromising the complex realities of a particular behavior or series of behaviors, the risk is no greater than that of the researcher relying primarily on the written word.

Typically, film is accepted most openly is when it is considered to fit the documentary archetype. This stems from the widely held belief that film is a mirror for the world. The argument is that the camera is a device for scientifically recording data about human behavior that is more objective than other types of information because of the mechanical nature



The advertisement features a stylized, wireframe-like face on the left side, composed of a grid of points and lines, with a glowing effect. To the right of the face is the Esearch.com logo, which consists of a stylized 'E' inside a circle. Below the logo, the text reads: "search.com ONLINE" in a bold, sans-serif font. Underneath "ONLINE" is a vertical list of dots, with the words "sample", "panels", and "research" interspersed. At the bottom of the advertisement, there is a block of text: "Since 1995, researchers have called on Esearch.com for their online panel needs. Esearch.com, Inc. online fielding support for research. email: esearch@esearch.com http://www.esearch.com 310.265.4608".

of the collection device. While this may be true, it probably is not. However, given the context of the work (time limitations and constraints imposed by the nature of contractual research), the footage supplied by the camera may be as close as we can get to a check of objectivity. The reality of research purchased by a company is such that it assumes, even demands, a final product that is easily used, applies to a wide range of internal needs, and can be readily disseminated.

For some, manipulation of the footage (editing it into a film, altering, etc.) destroys its “scientific value.” The model is that teams go into the field to film material, the scientist studies the footage, and the filmmaker transforms it into art. In actuality, this fantasy is never realized. The footage is indeed dissected and analyzed by the researcher, typically transformed into a product the client will readily consume, but by its very nature qualitative research always has a degree of subjectivity. In fact, any and all research, be it in the field and interpretive or in the laboratory and highly controlled, involves degrees of subjectivity and personal biasing. This hardly invalidates the work or the means by which data are captured and displayed. Validity and reliability are not necessarily one and the same.

If researchers are supposed to make films intelligible to client audiences, they must learn what common sense, such as it is, dictates as constituting a good documentary film; that is, they should emulate the aesthetic conventions of documentary realism. Pieces of the puzzle are, of course, missing from any documentary film, but the most important themes and primary informational pieces remain for consumption by a wide range of viewers. The pieces selected for a final edit do indeed play to the emotions of the client, but without that emotional impact clients are likely to forgo the deeper issues entirely and be unwilling or unable to sift through the informational tome so often presented by researchers. By communicating customer needs, reactions, behaviors, etc., film spurs viewers to delve deep-

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er into the research findings and examine the totality of the research in greater detail. Film can be used to access a level of emotional response and personal identification or conflict which is difficult within the lexical constraints of writing. By a series of movements in a sequence, films can communicate in concrete and specific terms what in written words would be abstract expressions.

Another argument against video documentation as a primary means of disseminating findings is that because prior consent is always sought, there is always some degree of engagement by the participant with the camera and therefore the findings are inaccurate. However, the very fact that participants are recruited for any study by definition means that there is some degree of awareness and engagement.

Consequently, whether the awareness and engagement take place with the researcher exclusively or with the researcher and camera together, the authenticity of an activity, context or behavior should not be in dispute. After all, typically, the camera is soon forgotten, but the person asking questions and watching over the shoulder remains.

The case of cell phones, youth and Japan

A company had contracted with the consulting firm for whom I was working at the time in the hope of gaining a better understanding of how portable information devices (such as PDAs) and Internet-ready cellular phones were used in the context of daily life. It was interested in uncovering what

characteristics other than image quality, sound quality and functionality were determinate in the decision to purchase a PDA or cellular phone in urban centers of Japan, and why those “peripheral” issues were important. The term “peripheral” is the term used by executives to describe how they viewed the work – they were skeptical of the notion that culture impacts perceptions and uses of technology. So, while the team was ensured work, there was little guarantee that the findings would be implemented. In addition, the researchers were given half the time to conduct the research that they had originally requested. Gaining the attention and interest of primary decision makers in order to conduct further, more in-depth research at a later date became almost as important as the findings. Without continued research, the researchers feared that the company would act without consideration to the needs and cultural patterns of the population.

The team was asked to identify some of the behavioral and cultural motivators in the purchasing decisions of young (16–30 years old) Japanese from middle-income homes. The research took place in several locations in Japan to provide a range of cultural practices. However, because the researchers (two ethnographers and one social psychologist) were out of touch most of the time but needed at the end of the project to build a single, cohesive series of conclusions, they needed to capture the participant observation sessions on video for later shared analysis and review. Added to this was the fact that only two of the

researchers spoke Japanese well enough to effectively communicate. The other had to rely on interpreters or the language skills of the informant. The researchers decided it was imperative to capture on video exactly what was said for later analysis and translation.

Because of time constraints and the limited language skills of the researchers, the goal of the research centered greatly on material culture, display and overt patterns of interaction. Consequently, activities, objects, spaces and moments of interaction needed to be captured on video so that the researchers could return to the tapes later to catalogue patterns. Without the video footage, much of the information would have been overlooked or misinterpreted – video allowed the team to accurately assess their assumptions, catalogue use patterns and artifacts, and check for validity.

By returning to the video over a two-week period, the researchers were able to determine with some accuracy what designs were preferred and why, what levels of functionality were important, what was most significant in terms of brand and image, and what patterns of interaction were taking place. It also allowed them to demonstrate what they did not know and thus get buy-in to conduct more extensive research. The final video presented to the company ensured that business planners and designers would be sensitive to cultural aspects of products to be used in Japan.

Clear understanding

Video documentation both for client presentations and for data analysis is a vital tool for conducting ethnographic research in the business environment. There are obviously significant issues that must be dealt with openly and honestly, but those challenges can be met and dealt with if we have a clear understanding of the benefits and risks along with the processes involved in capturing and analyzing the footage we shoot. If not, ethnographers in the business environment run the risk of being ignored and ultimately forgotten. | Q

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Getting emotional

A major consumer products company was launching an effort to revitalize a weakening brand in the female health and beauty aids category. For this particular case, our client wanted to better understand customers' wants and needs for the category as a whole, and specifically, it hoped to uncover both performance needs (i.e., functional needs) and emotional needs related to its product. The key was not only to elicit customers' functional and emotional needs, but also to understand how the two types of needs were linked in customers' minds.

An adaptation of our firm's VOCALYST methodology was used to draw out and refine this information. The three-month study produced a host of data, including a detailed needs hierarchy, linkages, and individual brand "emotional profiles." Our client finished the project with a clear roadmap for the specific product, positioning and advertising changes necessary to revitalize the brand.

While we are unable to cite actual project data for confidentiality reasons and we have disguised the data using body wash as a substitute female health and beauty aid product, the case study that follows is an accurate representation of the project objectives, approach and insights associated with the actual client study.

Consumers weren't interested

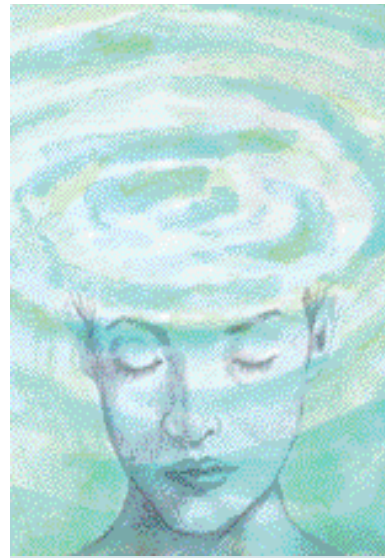
Our client was faced with the challenge of revitalizing a stagnant brand and differentiating its product within the increasingly crowded body wash market. Store shelves displayed a dizzying array of products, each of which was offered in multiple scents, varieties and packages.

Our client's brand had a long-standing presence in the body wash category but had experienced a gradual drop in market share. The brand was positioned towards women and had recently been redesigned with more feminine scents, updated pack-

aging and a new advertising campaign. Despite these efforts, however, the brand remained stagnant. Female consumers just didn't seem interested. What was the problem?

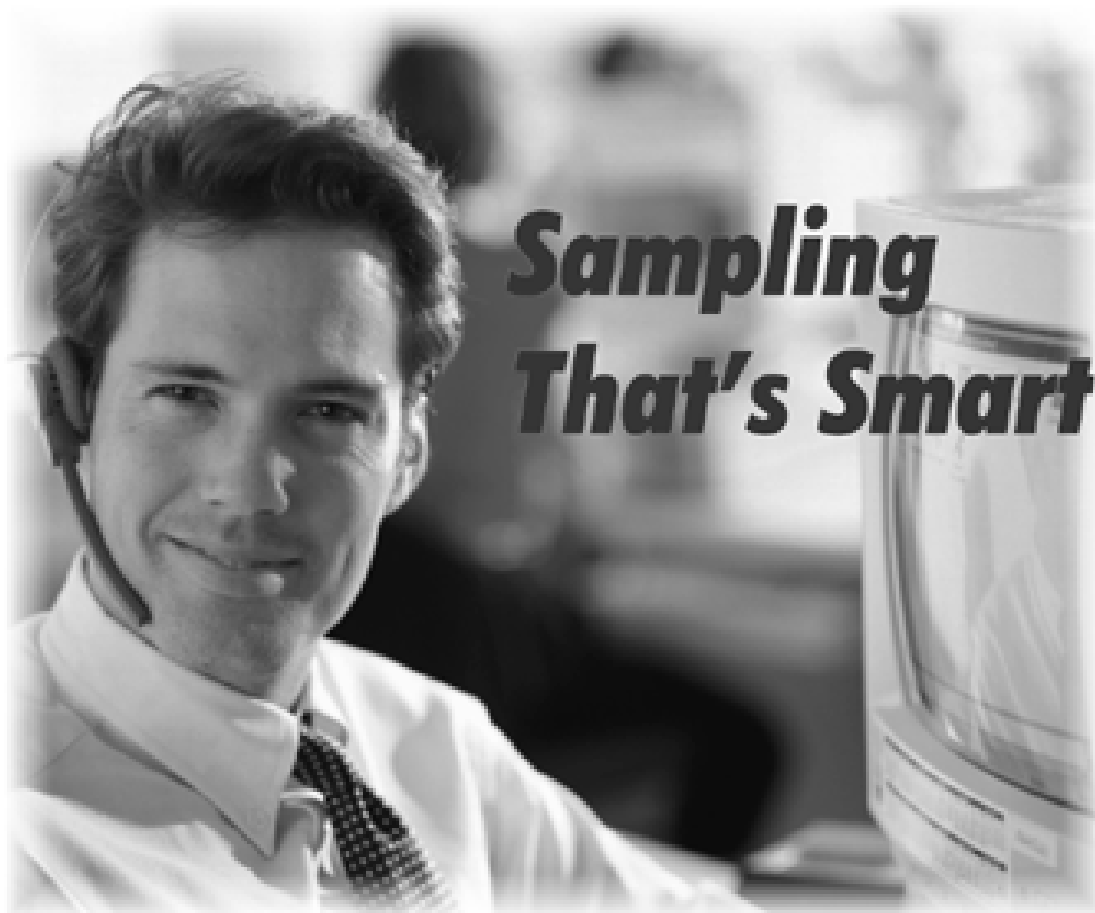
Executives suspected the issue might lay not with the functional aspects of the product - e.g., its performance, scent and packaging - but rather with its emotional component. Put another way, no matter how well-formulated or packaged a product might be, if it wasn't positioned to push the right emotional buttons, then customers were likely to pass it

Did the product stop pushing consumers' emotional buttons?



By Gerry Katz
and Elizabeth Lajoie

Editor's note: Gerry Katz is executive vice president, and Elizabeth Lajoie is a former project director, at Applied Marketing Science, Inc., a Waltham, Mass., research firm. Katz can be reached at gkatz@ams-inc.com.



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To help uncover the root of the problem, our client decided to launch a modified VOCALYST study. The VOCALYST method, which was developed at the MIT Sloan School of Management, was selected to provide a compendium of customers' wants and needs regarding the entire product category. Additionally, since the method was designed to express those wants and needs in the customers' own words, it would provide a common language for our client's R&D, advertising and product management functions to use in their discussions. And perhaps most important, the process would help uncover the linkages between customers' emotional and functional product needs.

Why emotional needs?

Market research has long confirmed that customers buy the products and services that best meet their needs. Thus, a detailed understanding of those needs is critical to a product's success. For example, a deodorant needs to "stop sweat" and "eliminate odor," just as a shampoo needs to "make lots of rich lather" and "leave hair shiny." These are functional needs that, in many ways, define both the product category itself and the must-have features of any successful product offering within that category.

For many products, however, marketplace success requires more than just delivering on functional needs. In order to be successful, products often need to meet customers' emotional needs as well.

Emotional needs describe how a particular product makes a customer feel, and are often the basis for product positioning, advertising and other kinds of marketing messaging. For example, "makes me feel comfortable around other people" and "helps me feel confident" are two basic emotional needs that a beauty aid may have to meet. For many consumer products, customers' emotional needs – and how the product is positioned to deliver on those needs – can be just as important as what the product actually does functionally. Equally important, understanding the connections and

linkages between customers' emotional needs and the product's functional characteristics can help marketers create a compelling product and effective marketing and advertising strategies.

While personal care products like soap, shampoo and cosmetics are a natural fit for emotional messages, food, cleaning agents, health and wellness aids and a host of other consumer products and services can also benefit from identifying and meeting customers' emotional needs. And while emotional messaging is arguably most important for consumer products and other categories where there is little product differentiation, many commercial and B2B categories are also strongly influenced by emotional needs. For instance, in one medical supply category we investigated, we learned that "maintaining a professional appearance" was a strong motivator among physicians. Rare is the product to which customers do not have some emotional, albeit possibly hidden, connection.

Outlined goals

Before starting the study, the project team outlined the study's goals, which included:

- Helping our client better understand customers' functional and emotional needs surrounding the product category.
- Determining the relative strengths and weaknesses of our client's product in relation to these needs.
- Identifying the distinct linkages between emotional and functional needs (for example, which functional benefits were connected to which emotional needs).
- Creating an emotional "profile" for our client's product versus competitive brands.
- Recommending specific product, positioning, packaging and advertising changes, as necessary.

With the goals clearly defined, work was ready to start. As with any voice-of-the-customer study, the project began with collecting and identifying customer wants and needs. Interviews were conducted with female respondents in various geographic locations who had used, or were at least familiar

with, our client's product. In addition to probing for product likes, dislikes and benefits, the interviews focused on identifying feelings associated with the product and its use. Actual product samples and a selection of advertisements were used throughout the interviews as a conversation aid.

Prior to the start of each interview, respondents were asked to fill out a brief survey designed to start them thinking about emotions, feelings and the related emotional vocabulary. Interview dialog included projective techniques to identify the complete set of emotional needs associated with the product category. For example, respondents were asked to imagine certain work, social or personal situations and to describe how they would feel in each.

Additionally, the interviews incorporated extensive probing to uncover the underlying emotions driving respondents' functional product needs. For example, probing beyond a simple "I want to be clean" statement illustrated that respondents had a need to feel comfortable around and be accepted by others. Finally, respondents were asked to describe different brands' typical users, or to equate different brands to car models or animals. This information helped develop personality profiles for each brand.

Interviews were conducted in focus group facilities with one-way mirrors so that others would be able to watch the proceedings. Each interview was audiotaped, transcribed verbatim, and then carefully read in order to identify and extract specific wants and needs. Emerging needs were classified as functional or emotional, and the original collection of needs was analyzed to eliminate duplicates and other statements that were not true underlying needs but rather target values or solutions to needs. The result was a list of 31 emotional and 53 functional needs that formed the basis for the card-sorting process.

In the card-sorting process, each respondent was given two decks of cards, with one need statement on each card. White cards were printed with functional needs statements and pink cards were printed with emo-

tional needs statements. Respondents first sorted the white cards containing functional needs into piles or bundles that “went together in their minds.” Once this affinization exercise was complete, respondents indicated the importance of each bundle and evaluated how well various product brands met the needs represented in each. Finally, they matched each pink card, containing an emotional need, to the pile of functional needs that, in their mind, had the strongest connection to that emotional need.

Clear picture

Subsequent cluster analysis of the card-sorting data painted a clear picture of the needs hierarchy and the linkages between customers’ functional and emotional needs. Equally important, the analysis identified the respective strengths and weaknesses of existing products across a broad range of parameters. We successfully illustrated which features and emotional needs were important to customers and mapped how well different prod-

uct brands performed on each dimension of customer needs. Finally, customer perceptions of a brand’s functional performance were matched with the emotional needs most closely related to that brand’s functional strengths to create individual emotional profiles for each brand.

In those cases where our client’s product performed relatively well on a functional need, our recommendations focused on changing related emotional messaging, since functional product changes were unlikely to have a strong effect. Conversely, for functional needs areas with a large performance gap, our recommendations focused on both product and emotional message changes.

Armed with this information, the company’s product team clearly identified those areas where actual product changes were needed. In addition, the team pinpointed areas where its product was emotionally lacking, and where it could develop new advertising and positioning strategies that addressed the product’s particular

weaknesses. With the VOCALYST study results in hand, our client was in a strong position to revitalize its product.

A better understanding

Some key lessons from this project:

- Customers clearly link specific emotional needs to concrete product functions. Understanding these linkages can lead to better-positioned, stronger brands.
- A product can be a functional performance “superstar,” but still lack the right emotional messaging. Both pieces are important for long-term product success.
- Finally, understanding how customers see your product or brand’s emotional profile is critical. In this particular case, emotional mapping of individual brands allowed our client to gain a better understanding of how customers perceived the product space. Sometimes, what companies think customers perceive is quite different from what customers actually perceive in the marketplace. | Q

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ducted for NRF by BIGresearch from October 5-12, 2005. The consumer poll has a margin of error of plus or minus 1.0 percent. For more information visit www.nrf.com.

Men, longtime Internet users most likely to use RSS

Users of RSS (really simple syndication, a format designed for sharing headlines and other Web content) are significantly more engaged in online news than non-users, visiting an average of 10.6 news sites compared with 3.4 news sites for non-users, according to findings from New York-based Nielsen//NetRatings. "Convenience is the primary reason respondents gave for using RSS feeds," says Jon Gibs, senior research manager, Nielsen//NetRatings. "Once the technology has been adopted, users can easily add new content. This allows news-hungry Web visitors to sample a wide variety of news sources."

Not only do RSS users visit more news Web sites than non-users, they also visit those sites more frequently. RSS users visited the top 20 news Web sites nearly three times as often as non-users and all other news Web sites four times as often. This means that sites outside of the top 20 properties may be among the greatest beneficiaries of RSS.

Notably, 83 percent of survey respondents who were identified by clickstream data as RSS users were unaware that they were using RSS technology. This can be explained by sites such as MyYahoo!, where users can customize content without knowing anything about the RSS feeds that make that customizing possible.

Among RSS users who understood the technology, 78 percent were male, and 48 percent were longtime Internet users who have been going online since at least 1994. Among unaware RSS users, 54 percent were male and 36 percent were longtime Internet users. "Men tend to be early and aggressive technology adopters,

but it may come as a surprise that the youngest Internet users were not the most RSS savvy. RSS users are particularly focused on breaking news, and trend toward an older demographic," Gibs says. For more information visit www.nielsen-netratings.com.

Portrait of a satellite radio listener

Much has recently been written about the prospects for satellite radio. Most of it is spin by owners of the networks or Wall Street analysts using future projections. However, an analysis of the most recent Simultaneous Media Survey (SIMM VI) by BIGresearch, Worthington, Ohio, defines listeners of satellite radio from a consumption standpoint.

Here are some numbers on the consumption power of a small (4.3 percent of 18+ population, approximately 9.5 million) but lucrative group of consumers:

Gender: male - 56.1 percent; female - 43.9 percent.

Average age: 42.7 (66 percent are between the ages of 25-54).

Average household income: \$77,329.

Top pet: dog (68.5 percent).

Top-five leisure activities: watch TV (68.3 percent); listen to music (66.4 percent); surf the Net (65.0 percent); dining out (63.8 percent); read books (59.9 percent).

Satellite radio listeners are also more likely to go to the movies, play team sports, golf, tennis, tailgate, snow ski, or participate in boating, sailing or swimming.

They are a pharmaceutical company's dream. Satellite radio listeners suffer from the following health conditions more than the general population: acid reflux, allergies, arthritis, depression, headaches/migraines, heartburn/indigestion, heart disease, insomnia, excess weight.

They are influential consumers who give advice to others about purchasing products or services - 40.5 percent regularly do so. When it comes to shopping they buy their groceries at Wal-Mart; their undergarments are Hanes, Fruit of the Loom

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Once they are recharged they go online and their top three ISPs are Comcast, AOL and SBC/Yahoo. While online they prefer to search using Google or Yahoo!. But they don't just search - 40.5 percent regularly shop online and they shop at eBay, Amazon or Newegg most.

In the next six months they'll stay just as busy as ever with above-market purchase intentions for: cars/trucks, computers, furniture, home appliances, houses, jewelry, major home improvement, RV/boat, stereo equipment, TVs, DVDs, digital camera, and vacation travel.

If you see a satellite radio listener driving around town (probably on their way to buy something) they'll likely be behind the wheel of a Chevy, Ford, Dodge, Toyota, Acura or GMC. And for those satellite radio listeners who haven't already spent enough and are planning on buying a car/truck, here's the five top brands they are looking to buy: Ford, Chevy, Lexus, Toyota, Dodge. For more information visit www.bigresearch.com.

Study compares and contrasts Wal-Mart and Target shoppers

Scarborough Research, New York, has released an analysis of exclusive shoppers of retail behemoths Wal-Mart and Target. The analysis reveals that these retailers are attracting distinct customer bases, and the household

shopping patterns of the Wal-Mart-exclusive shopper are much different than those of the Target-exclusive shopper. (Exclusive Wal-Mart shoppers are those adults who shopped at Wal-Mart and not Target during the past three months. Exclusive Target shoppers are those adults who shopped at Target and not Wal-Mart during the past three months.)

Wal-Mart, branded for its low prices, is attracting a consumer set that concentrates much of its household shopping at Wal-Mart. Scarborough analyzed 24 retailers (retailers included in this analysis are those with a 5 percent or higher incidence of past-three-month shoppers across Scarborough's 75 local markets) in addition to Wal-Mart and Target and found that Wal-Mart-exclusive shoppers are less likely than average to have shopped at all but four on the list. Those retailers that are more popular than average among Wal-Mart-exclusive shoppers are other discount stores including Dollar General, Family Dollar, Big Lots and K-Mart.

Target is known for featuring merchandise from designers who are also popular among the couture set. Isaac Mizrahi and Simply Shabby Chic are a few of the luxury brands that have lines at Target. Consequently, Target-exclusive shoppers are especially likely to have shopped at relatively upscale stores such as Nordstrom and Macy's. These consumers also are avid shoppers in general. Of the 24 retail outlets measured by Scarborough in the analysis, Target-exclusive shoppers are more likely than average to shop at 15

of them.

The different shopping patterns of Wal-Mart and Target customers can be attributed to demographics, lifestyles and geographic location. Target-exclusive shoppers are 62 percent more likely than all consumers to have an annual household income of \$100,000+. This level of income fuels the ability to shop at upscale retailers such as Nordstrom. In contrast, Wal-Mart-exclusive shoppers are 34 percent less likely than all consumers to be in this income bracket. Wal-Mart-exclusive shoppers are 10 percent more likely than all consumers to be ages 50+. Target-exclusive shoppers, on the other hand, are 7 percent less likely to be in this age bracket.

"Geographic location also drives shopping habits, and understanding local demographics and lifestyles is essential to properly targeting shoppers," says Alisa Joseph, vice president, advertiser marketing services, Scarborough Research. "Given that Target attracts an upscale crowd, these stores are more likely to be in regions with a similar shopping base, and therefore high-end retailers are more likely to be present as well."

Both together and separately, Target and Wal-Mart have massive market penetration in the U.S. and they indeed share many shoppers. The Scarborough analysis finds that 83 percent of U.S. adults shopped at Wal-Mart, Target or both during the past three months. Thirty-one percent of consumers are Wal-Mart-exclusive shoppers, meaning they shopped at a



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Wal-Mart but not Target during the past three months, and 12 percent of consumers are Target-exclusive shoppers.

As one would expect, the 40 percent of consumers who shopped at both Wal-Mart and Target during the past three months are generally avid shoppers all around. They are more likely than average to have shopped at 23 of the 24 department store brands analyzed by Scarborough for this report. As compared to all consumers, these dual Wal-Mart/Target shoppers are especially likely to have shopped at Mervyn's, Burlington Coat Factory, Dillards, Kohl's and Pier One. For more information visit www.scarborough.com.

More women taking up woodworking

A study by Minneapolis-based Rockler Woodworking and Hardware, a supplier of specialty hardware, tools and other woodworking products, found that a growing number of women are tackling woodworking by building custom cabinets, book shelves and tables. "There are close to four million American women woodworkers today," says LiLi Rockler Jackson, Rockler Companies spokesperson, "It's a trend that is quickly rising as more and more single women become

homeowners. Our own research shows that the majority of women who started woodworking in the past three years say they want to create something with their own hands for their own home. Women are drawn to working with wood because it's a creative outlet that provides a gratifying sense of accomplishment."

"I'm making something original I can't buy anywhere else," explained one respondent. "I woodwork to create items designed to fit my needs and personal style," said another woman. "I challenge myself by creating a functional design and then being smart enough and skilled enough to build it," said yet another.

According to cable television host JoAnne Liebler, the sense of accomplishment experienced by women woodworkers is much of what's fueling this phenomenon. "Women are realizing they can use power tools and build something amazing," Liebler says. "They see me handling a circular saw and they think, 'Hey, if she can do it, I can do it, too.' The fear factor has been replaced with a sense of empowerment."

Rockler Companies' marketing research suggests that nearly one-third undertake the pastime to create furniture. And while most women woodworkers create a wide variety of items, of those interviewed 21 percent create

craft items such as picture frames; 19 percent build storage items such as custom cabinets or shelving; 17 percent complete home improvement projects such as adding custom crown molding to a room; and 9 percent make children's items such as dollhouses and wooden toys.

While a growing number of women are just starting out as woodworkers, the research suggests woodworking is a lifestyle, not just a hobby. In fact, more than 33 percent of those interviewed have been woodworking for more than five years. Research participants also indicated that, while nearly 24 percent of women who participated in the research said they first started woodworking as a way to improve their homes, they also found that they greatly enjoyed working with wood and power tools.

Thirty-eight percent do woodworking at least once a week; 58 percent do woodworking at home in rooms or shops dedicated to woodworking; 71 percent own their own tools; and the majority - 42 percent - have spent more than \$1,000 to date.

Rockler Companies first noticed a growing trend of women participating in woodworking nearly four years ago when it launched womeninwoodworking.com. Since then, female visitors to the site have jumped 27 percent. "Our retail sales also showed the growth of the female market. Women were coming to our stores asking for advice on how to build cabinets or tables," says Ann Rockler Jackson, the company's CEO. "We realized that women woodworkers approach the craft differently than men. Women sometimes hesitate to ask how or why in a mixed group or in a workshop, but jump right in asking questions when talking with other women woodworkers."

The increase in women woodworkers visiting Rockler's stores and Web site corresponds to a national phenomenon. According to the National Association of Realtors, single women are the fastest-growing group of home buyers and make up the second largest group of home buyers after couples. According to the association, the number of single female homeowners has

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doubled in the past 15 years.

“We believe this trend has been pushed by the popularity of do-it-yourself programs,” says LiLi Rockler Jackson. “Women are seeing other women using power tools to make attractive and functional new home furnishings. Suddenly, the intimidation factor that held many women back disappears. In fact, nearly 47 percent of those interviewed stated that they most often work with portable power tools, like sanders, routers, drill drivers, and jigsaws. Thanks to do-it-yourself programs, ‘no way’ has been replaced with a can-do attitude that has helped to drive this trend.” For more information visit www.rockler.com.

Sex gets men’s attention in ads, but at a price

In what will surely come as no surprise, sex in print advertisements improves the ad effectiveness for men, including ad-like, product-like, and purchase intent, while it decreases ad effectiveness for women. For

both men and women, sexual ads make it less likely that they will recall correctly which brand an ad was promoting. These are the top findings of a study conducted by market research company MediaAnalyzer Inc., Somerville, Mass. The online test combined a questionnaire and a visual test using MediaAnalyzer’s Web-based eye tracking method, AttentionTracking.

Some of the conclusions: Sexual ads have a strong, polarizing effect on the visual behavior of men and women. Men spend a high amount of attention on the sexual imagery (e.g., female breasts, legs and exposed skin). While this does increase ad liking and product liking, and transfers to purchase intent, it draws men’s attention from other elements such as the brand logo – one of the reasons why their brand recall is worse than women’s.

Women, on the other hand, avoided looking at sexual imagery or even exposed skin. “You can increase purchase intent using sex

when advertising to men. But you pay a price; brand recall suffers. That means using sex in ads only makes sense for companies with a well-established brand, or those where branding plays no role,” says Karsten Weide, president and CEO, MediaAnalyzer Inc.

The study also found that sexual ads polarize the sexes in general: While men like ads with sexual themes and do not think they have negative effects on society, women feel the opposite way. Most women believe there is too much sex in advertising (58 percent) and more than 40 percent of all women feel that sexual ads signify and promote a general deterioration of moral and social values, and pose a threat to the proper upbringing of children, respectively.

The study tested 10 current U.S. print ads – five of them included sexual imagery and five did not – with 400 U.S. respondents split evenly between men and women. For more information visit www.mediaanalyzer.com.

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Product and Service Update

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application and uses a Web-based architecture to facilitate collaboration and sharing of research data and analysis. For more information visit www.marketsight.com.

Newsletter examines return on marketing

ROMI Update, a new e-newsletter published by Evansville, Ind., research firm the ARS Group, is now available to executives interested in issues and trends related to improving return on marketing investment (ROMI). In response to the Sarbanes-Oxley Act, U.S. public companies are looking at areas where large amounts of money are being spent, with an eye towards higher levels of accountability through the strengthening of process management and controls. Marketing expenditures are squarely in the headlights and an industry movement called return on marketing investment is emerging. For a complimentary subscription contact Jean Walker at 812-425-4562 or at jjwalker@ars-group.com.

Free survey creation software for Your2Cents clients

Users of the Your2Cents Online Opinion Panel from Dallas-based Common Knowledge Research Services now receive free survey creation software. The Your2Cents Survey Creator requires little or no training and is accessed over the Internet. The tool, which can also be licensed for use with other lists and panels, features a survey editor that accommodates complex survey designs. It also offers real-time quota management and a real-time graphical reporting tool as well as fully-labeled exports to programs including Excel and SPSS. For more information visit www.your2cents.com/info.

ESRI updates Community Coder

Redlands, Calif.-based ESRI has

released Community Coder 9.1, its customer profiling and data appending software that assigns information and location data to customer records, either individually or in batch mode. Companies, agencies and organizations can use Community Coder to develop an accurate picture of current customers and prospects. Version 9.1 is the first release of Community Coder to integrate with ArcGIS. New features and functionalities in Community Coder 9.1 include: ESRI's 2005/2010 demographic updates and forecasts; street geocoding data from Group 1 (vintage March 2005) with an optional upgrade to Tele Atlas street geocoding data (vintage March 2005); the ability to access Community Coder project files through ModelBuilder in ArcGIS 9.1 Business Analyst; the ability to output standardized addresses; new input file options including shapefile and personal geodatabase; and new output file types including XML. For more information visit www.esribis.com.

Remark Office OMR v6.0 now out

Principia Products, Malvern, Pa., has released Remark Office OMR v6.0, its data entry and data processing software package. The optical mark recognition system allows a user to scan almost any plain paper OMR form, without the need for registration marks or special inks. The data from filled-in bubbles or checkboxes is recognized and placed into a spreadsheet where it can be exported into over 35 different formats or analyzed in Remark Quick Stats, the software's built-in analysis component. The user can design and change forms according to need using any word processing or design program.

Through a scanner's Twain driver the software can read data from the scanner directly or it can read TIFF, PCX, and PDF image files. Enhancements include respondent ID tracking, a new

user interface, improved recognition algorithms, and the ability to add page identifiers. The software also works alongside Remark Web Survey to convert forms to HTML and integrate paper and Web-based surveys. Remark Office OMR includes Remark Quick Stats, an analysis component, which tabulates surveys and generates reports and graphs. A new Survey Wizard is also included, with support for question groups and comparison of demographic groups. A free demo and more information can be found at www.principiaproducts.com.

Harris service helps migrate tracking studies to Web

Rochester, N.Y.-based Harris Interactive and the Harris Interactive Service Bureau are now offering research firms SynTrack Online, a technical and consultative framework built on Harris Interactive capabilities for use in migrating syndicated and tracking studies to the online platform. SynTrack Online is designed to: preserve trended data; ensure representativeness through sampling and advanced weighting techniques; accommodate mixed-mode studies; and improve studies that rely on low-incidence populations. For more information visit www.hisbonline.com.

Briefly

Romania-based Ipsos Interactive Services Europe (IIS Europe) has expanded its European Online Panel to five Eastern European countries: Romania, Russia, Hungary, Poland and the Czech Republic. Recruitment has begun for an initial 10,000 panelists in each country. For more information visit www.ipsos-interactive.com.

City Focus Research, London, is now offering FocusVision's VideoMarker at its facility. VideoMarker is a software-based

video recording, editing and storage system. For more information visit www.cityfocusresearch.com.

Seattle research firm QuestionPro has added functionality to its online survey service. The Market Research Toolset extends the existing data collection and analytics services by adding three new capabilities: online panel management, action-oriented analytics and decision support systems. For more information visit www.questionpro.com.

Saskatoon-based Interactive Tracking Systems Inc. has enhanced its online survey reporting for both CATI and Web surveys, adding improved data filtering and reporting and download options including the ability to import charts into Word or PowerPoint. For more information visit www.itracks.com.

WestGroup Research, Phoenix, has moved into expanded facilities, adding focus group suites featuring digital recording systems, wireless and wired Internet access and Web-based remote monitoring of groups. The new location also includes a multipurpose room seating up to 100 and a 60-station CATI center. For more information visit www.westgroupresearch.com.

Synovate has launched Synovate24, an automated overnight research tool designed to enable Australian automotive manufacturers and dealers to enhance their customers' experiences when purchasing a wide range of dealer services. The product was developed with international industry input and is based on the NADA24 program run by the National Automobile Dealers Association (NADA) in the U.S. For more information visit www.synovate.com.

New York research firms Millward Brown and Dynamic

Logic are now offering DigitalLink, a new online copy testing tool. It will focus on the components necessary to evaluate online creative - ability to capture attention, deliver a compelling message and generate a desired response (click-through to brand consideration). For more information visit www.millwardbrown.com.

Germany-based GfK-Nürnberg e.V. has launched GfK Academy, offering continued professional development and training for managers. The GfK Academy gives managers working in the areas of marketing, market research and market-oriented corporate planning the opportunity to consider issues relating to knowledge-based market and marketing management under the direction of international experts. For more information visit www.gfk.com.

ACNielsen India is equipping a

field force in India with handheld terminals for data collection across the country. ACNielsen's handheld terminal is a personal digital assistant embedded with proprietary software applications designed to capture retail sales data used by the country's marketing community. Data from 750 individual terminals will be transmitted from over 200 locations across the nation to ACNielsen's processing hub at Baroda. For more information visit www.acnielsen.co.in.

Toronto research firm Ipsos ASI is now offering Ad*Graph Express, an ad campaign tracking tool. Ad*Graph Express costs \$9,500 for 1,000 interviews conducted nationally, and results are delivered within one week. Ad*Graph Express is aimed at companies that want to know how their ad(s) are doing, to assess several different executions within a campaign to see which is working best, and to assess if the ad is wearing out. For more information visit www.ipsos.ca/asi.

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Research Industry News

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Awards/rankings

Shugoll Research, Bethesda, Md., was named one of the Ten Best Companies Supporting the Arts in America by the Business Committee for the Arts and *Forbes*. Shugoll Research is the creator and sponsor of ArtSpeak!, a nine-year-old program designed to excite students about the arts and create an interest in attending live performances. ArtSpeak! brings artists into schools where they talk about their career, answer questions, sign autographs and perform.

U.K. research software firm **Pulse Train** has won the 2005 MRS/ASC Joint Award for Technology Effectiveness. The award, given by the Market Research Society and the Association for Survey Computing, is for outstanding innovation in the application of software or technology to market, opinion and social research. Pulse Train won for its mixed- and multi-mode interviewing system, Bellview Fusion. Its entry was based on Bellview Fusion's implementation at the National Opinion Research Center (NORC) at the University of Chicago, where it is being used as a component in the U.S. National Immunization Survey, a study that provides details of vaccination coverage among pre-school children across 50 U.S. states and 28 large urban areas.

Cultural Access Group, a Los Angeles research firm, and **Interviewing Service of America**, Van Nuys, Calif., have been awarded the first-ever 3AF (Asian American Advertising Foundation) Research Partner of the Year for their work on the Asian American Market Report. Covering six of the major Asian nationalities, as well as African-Americans, Hispanics and non-Hispanic whites, the Asian American Market Report provides demographic, cultural, behavioral and media insights.

New accounts/projects

Media companies **Global News** and **CanWest News Service** have selected Toronto research firm **Ipsos Reid** as their pollster of record.

New companies/new divisions/relocations/expansions

The MVL Group, a Jupiter, Fla., research firm, has created a new company, **Carbonview Research Inc.**, which will focus on online research.

Consumer Pulse has moved its Charlotte data collection facility to Eastridge Mall, 246 N. New Hope Rd., #118, Gastonia, N.C., 28054. Phone 704-854-8320. E-mail charlotte@consumerpulse.com. The facility is managed by Daniel Bashaw.

Mary Jo Martin, formerly vice president of research and database marketing at **The Quest Business Agency** in Houston, has formed **Knowledge-Based Marketing, LLC**, a Houston-based firm providing market research and consulting services. She can be reached at maryjom@kbasedmkt.com or at 713-344-0152.

The **Ipsos Group** has opened a new office in the Seattle area at 10900 N.E. 8th St., in Bellevue, Wash.

Company earnings reports

In results for the third quarter ended September 30, 2005, **Arbitron Inc.**, New York, reported revenue of \$85.6 million, an increase of 4.5 percent over revenue of \$82.0 million during the third quarter of 2004. A planned increase in expenses for the Houston Portable People Meter market demonstration and for the rollout of the Project Apollo pilot contributed to an increase in costs and expenses for the third quarter of 11.8 percent, from \$47.1 million in 2004 to \$52.7 million in 2005. Earnings before interest and income tax expense (EBIT) for the quarter were \$33.1 million, a decrease of 1.8 percent compared to EBIT of \$33.7 million during the third quarter last year.

Income tax expense for the third

quarter 2005 increased by \$4.1 million over the same period last year due in part to a third-quarter 2004 reversal of certain reserves for tax contingencies and a third-quarter 2004 reduction in the valuation allowance on certain deferred tax assets which together amounted to a benefit of \$4.2 million in the third quarter of 2004.

Net income for the third quarter decreased by 13.7 percent from \$24.2 million in 2004 to \$20.9 million in 2005. Net income per share for the third quarter 2005 decreased to \$0.66 (diluted), compared with \$0.77 (diluted) during the comparable period last year.

For the nine months ended September 30, 2005, revenue was \$234.6 million, an increase of 4.9 percent over the \$223.6 million in the same period last year. EBIT was \$84.4 million, compared to \$81.5 million in 2004. Net income for the nine months was \$56.1 million or \$1.77 per share (diluted), compared with \$50.9 million or \$1.62 per share (diluted) during the comparable period last year.

Oslo-based **Future Information Research Management (FIRM)** reported revenue increased in the third quarter 2005 by 35 percent compared to the same quarter in the previous year. FIRM reported revenue of \$3.69 million in Q3 2005 compared to \$2.73 million in Q3 2004. The company's EBITDA result was \$93,000 for the quarter, compared to \$85,000 in Q3 2004. Pre-tax profit was \$31,000 in Q3 2005, compared to \$182,000 in the same quarter last year. Accumulated revenues for the first nine months of 2005 were \$11.0 million, a growth of 30 percent compared to same period in 2004, and EBITDA year-to-date was \$84,000 as of September 30, 2005.

IMS Health, Fairfield, Conn., announced third-quarter 2005 revenues of \$432.8 million, up 13 percent (12 percent constant dollar), compared with revenues of \$384.2 million for the third quarter of 2004.

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Third-quarter diluted earnings per share on an SEC-reported basis were \$0.30, up 7 percent, compared with \$0.28 in the prior year. Third-quarter adjusted diluted earnings per share were \$0.34, compared with \$0.30 per share in the same period of 2004, an increase of 13 percent. Net income on an SEC-reported basis was \$71.1 million, up 8 percent compared with net income of \$65.6 million in the year-earlier quarter. On an adjusted basis, net income for the third quarter of 2005 was \$80.6 million, up 14 percent, compared with net income of \$70.7 million in the prior year.

Operating income in the third quarter was \$102.2 million on an SEC-reported basis and \$110.7 million on an adjusted basis, compared with operating income of \$102.9 million on both an SEC-reported and adjusted basis in the year-earlier period. Adjusted operating income excludes a charge of \$8.5 million for costs associated with the proposed merger of IMS and VNU N.V. Operating income was down 1 percent on an SEC-reported basis and rose 8 percent on an adjusted basis (7 percent constant dollar).

Adjusted results for the third quarter of 2005 exclude the merger-related costs mentioned above, certain net pre-tax income items totaling \$0.7 million, and certain net tax provisions of \$1.6 million. Adjusted results for the 2004 third quarter exclude certain net pre-tax expense items totaling approximately \$1.7 million, as well as certain net tax provisions of approximately \$3.3 million.

For the first nine months of 2005, revenues were \$1,277.1 million, up 13 percent (11 percent constant dollar) over the prior year period. Diluted earnings per share on an SEC-reported basis for the 2005 first nine months was \$0.84, compared with \$0.89 in the year-earlier period, down 6 percent, primarily due to the tax recorded in the first nine months of 2005 on cash IMS is repatriating under the American

Jobs Creation Act of 2004 (AJCA). Adjusted diluted earnings per share for the first nine months of this year were \$0.98, a 17 percent increase over the \$0.84 reported in the prior-year period. On an SEC-reported basis, net income for the first nine months of this year was \$194.7 million, compared with \$211.8 million for the year-ago period, an 8 percent decrease. On an adjusted basis, net income for the 2005 first nine months was \$226.5 million, up 12 percent, compared with adjusted net income of \$201.6 million for the comparable period last year.

Operating income for the first nine months of 2005 was \$302.4 million on an SEC-reported basis and \$318.3 million on an adjusted basis, compared with \$301.6 million on both an SEC-reported and adjusted basis in the year-earlier period.

Adjusted operating income for the 2005 first nine months excludes a charge of \$15.9 million for costs associated with the proposed IMS and VNU merger. Operating income growth in the 2005 first nine months was flat on an SEC-reported basis and up 6 percent on an adjusted basis (4 percent constant dollar) from the same period last year.

Adjusted results for the first nine months of 2005 exclude the merger-related costs mentioned above and certain net pre-tax income items totaling approximately \$15.1 million, as well as certain net tax provisions of approximately \$31.1 million, primarily related to the \$39.5 million tax expense recorded in the first nine months of 2005 on cash repatriated under the AJCA. Adjusted results for the first nine months of 2004 exclude certain net pre-tax income items of approximately \$9.6 million and certain net tax benefits of approximately \$0.7 million.

Opinion Research Corporation, Princeton, N.J., announced third-quarter revenues of \$48.7 million versus \$48.9 million in

the prior year's third quarter. Social research revenues were \$34.1 million versus \$32.7 million in last year's third quarter. Market research revenues totaled \$12.9 million versus \$13.0 million in the prior year's third quarter. Teleservices revenues were \$1.8 million versus \$3.2 million in last year's third quarter.

The company reported a net loss for the quarter of (\$4.65 million). This includes an impairment provision for the remaining goodwill in the teleservices segment, a previously announced write-off of expenses incurred in a postponed equity offering and a tax accrual adjustment due to a change in the estimated annual tax rate, which together reduced net income by approximately \$5 million. Net loss per diluted common share was (\$2.58). The above items and the impact from the previously announced repurchase of the LLR interests reduced earnings per diluted common share by \$2.64. Net income and diluted earnings per share for the third quarter of 2004 were \$1.0 million and \$0.15 respectively.

For the first nine months of 2005, revenues were \$149.4 million compared to \$146.3 million in the first nine months of 2004. The company reported a net loss for the nine months of (\$3.2 million). This includes the goodwill impairment provision, a first quarter refinancing charge and the write-off of the equity offering expenses which together reduced net income by approximately \$5.3 million. Net loss per diluted common share was (\$2.12). The above items and the impact from the repurchase of the LLR interests reduced earnings per diluted common share by \$2.45. Net income and diluted earnings per share for the first nine months of 2004 were \$1.7 million and \$0.26 respectively. Last year's nine months was impacted by a refinancing charge that reduced net income by \$1.5 million and diluted earnings per share by \$0.24.

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Names of Note

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Marc Litvinoff has been named president of New York research firm *FIND/SVP, Inc.*

U.K. retail research firm *ESA* has named **Jacqueline White** to its projects team as senior executive and promoted **James Lovett** to project executive.

Greenfield Online, Wilton, Conn., has made changes to its senior management team and board of directors.

Dean Wiltse, formerly president and chief executive officer, has left the company and has tendered his resignation as a director. **Albert Angrisani** has been appointed president and chief executive officer and elected to the board of directors. Angrisani will also serve as chairman of a newly formed special operations committee of the board. The committee will work with operating management to review the compa-

ny's strategy and resources. Concurrently, the board has disbanded its mergers and acquisitions committee. In addition, the company named **Joseph A. Ripp** to the board of directors. Ripp, an independent director, has also joined the audit, compensation, governance and nominating, and special operations committees of the board.

Paul Weener has retired as CEO of *Diagnostics Plus*, State College, Pa.



Weener

Weener, who founded the firm in 1987, will continue in a part-time role working on strategic direction,

planning and business development efforts. The firm also announced four promotions: **Michelle Hostetler** to vice president of research and operations; **Noret Flood** to director of field services and technology; **Trish Evanitsky** to director of employee research; and **Michael Hostetler** to director of business-to-business research. In addition, **Caitlin Stanley** has been named research associate.

Arbitron Inc., New York, has promoted **Brad Kelly** to vice president of group sales.

New York research firm *Ipsos Insight* has named **Catherine LoPresti** to its consumer products research division as qualitative research consultant.

Ronda Hodges and **Carla Penel** have joined *M/A/R/C Research*, Irving, Texas, as research manager.

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Trade Talk

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plastic interior that the twentysomethings said was needed to withstand the wear and tear of carting their surfing, biking and camping supplies around.

The more I heard about the car, the more I was interested, even though I'm well out of the target audience's age range and the only surfing I do involves a TV remote. Sure enough, Ucmakli mentioned toward the end of his presentation that Honda happily found that the vehicle captured the interest of a segment of older drivers as well.

Another standout talk came from Richard Kelly, vice president of global market research at GE Consumer Finance, who offered tips on raising the profile of the corporate research function.

Prior to his arrival at the firm in 1999, there was no research function. Now the company invests \$10 million per year in research, conducting 500 focus groups and 150,000 consumer interviews. Kelly seems to have brought an almost entrepreneurial approach to his job. He is fortunate that his company supports some of his risk-taking (which really isn't risk-taking at all, but I often get the sense that companies view any kind of spending without an immediate return as risk-taking), but his efforts have clearly paid off so it's hard to argue with his methods. For example, the two-page newsletter he developed for company executives summarizing results of a global brand-tracking study has been well-received.

The newsletter is one example of his belief that, when communicating research results, you must adapt your approach to your audience. Some people want lots of data, others want a quick summary. Some learn best from detailed charts, others appreciate simple visual explanations. The bottom

line is, the more they can understand the results, the more worth they will assign to the process that obtained them.

That ability to package research findings to suit the needs of specific internal audiences is just one example of the capabilities he outlined. A researcher needs technical skills (these are a given), consultative skills (interpersonal and communication skills that help you adapt and flex to the styles of other managers), and interest in and knowledge of business growth (being able to measure and communicate research ROI).

Market segmentation

Keith Rozolis, vice president of strategic marketing and planning at ABC Supply Co., Inc., a Beloit, Wisc., seller of roofing and siding supplies, delivered a textbook example of the value of market segmentation. At the time of his arrival at the firm in 1999, Rozolis said, ABC was an entrepreneurial firm that was growing chiefly by acquisitions. (It started with three stores in 1982 and now has 280 in 44 states.) Taking cues from the service-profit chain model, the company began a five-year research process in 2000 to talk to and learn from the contractors who are its primary cus-

tomers.

With the help of research partner Maritz Research, ABC has identified four customer segments and each segment's wants and needs. Armed with that information, it has been able to, for example, avoid large expenditures on technology, after the research found only a fraction of its market sought an online price- and inventory-checking system. Research showed that the company had a wider range of customers than it thought, which paved the way for the introduction of new product and service lines such as windows and doors, which garnered greater share-of-wallet from existing customers while attracting new ones.

From 2000 to 2004, total sales went from \$1.2 billion to \$2 billion. Those results and the role of research in achieving them certainly haven't gone unnoticed within the company. Like Kelly, Rozolis stressed the power and value of finding ways to distribute research data to every level of the organization. But along with the data, don't forget to provide the insights and analysis, he said. That's what makes the numbers come alive and helps make a passive recipient into an active participant in the research process. | Q

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The Sox lost but research won

Red Sox Nation, feel free to blame me. While in Boston in September for the American Marketing Association's (AMA) annual marketing research conference, I took in a Sox game to get my semi-annual Fen way fix. The team looked sluggish in a loss to Toronto and I'm pretty certain, based on my proven ability to curse Minnesota's Twins, Vikings and Gophers teams by attending their games, that my presence in the stadium was their downfall.

Thankfully for the AMA, my jinxing abilities do not extend to research industry events. Attendance was up, way up, this year: at 785 attendees - 145 more than in 2004 - it was the highest ever. I'm not sure what the increase indicates, though I hope it's a sign that businesses are feeling a little more flush and that their interest in using research is growing.

Those who came seeking examples of companies that are already aware of the power of research had plenty to choose from. Jon Luther, CEO of Dunkin' Brands Inc., provided a nice follow-up to a presen-

tation that his firm's vice president of consumer insights delivered at last year's Marketing Research Association conference. In 2004, Dunkin's Regina Lewis spoke on research's role in developing a new line of lattes and cappuccinos. I recall her being hopeful that the success of that project would spur the company to see the value of research and continue down the consumer-centric path. Well, the very presence of the CEO behind the podium at a research conference a year later is proof that her hopes were realized.

Dunkin' seems to have embraced research in all its forms, using a number of methods for a number of purposes. For example, research was helpful in convincing a very hesitant Tropicana to co-brand with Dunkin' on a product that became the Tropicana Orange Coolatta. And to develop its Turbo Ice drinks, which were aimed at youthful coffee drinkers, Luther said the company asked kids to spend a few days recording their thoughts about coffee - whenever and wherever those thoughts occurred - noting instances where they felt they needed some "chug-

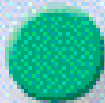
gable energy."

In another presentation, Aziz Ucmakli, assistant senior manager, advanced product planning at Honda, spoke on the role of research in developing the Element, Honda's odd-looking SUV/minivan/station wagon-like vehicle. A cross-functional team of designers and engineers in their 20s and 30s set out to create a different kind of vehicle, one aimed at young drivers who were active, outdoor-oriented types. Research included observational and ethnographic research, a facet of which was a lifestyle immersion in which Honda execs spent a night at a famous surfing beach to soak in the surfer lifestyle. (I can see the title of that PowerPoint presentation: "C-Level at Sea Level.")

Kids in the target market said they wanted space to haul and store all of their stuff but didn't want to drive a minivan. Taking the boxy shape of a lifeguard station as one of their many inspirations, the designers drew up the Element, which, along with a generous cargo capacity also has the durable

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