

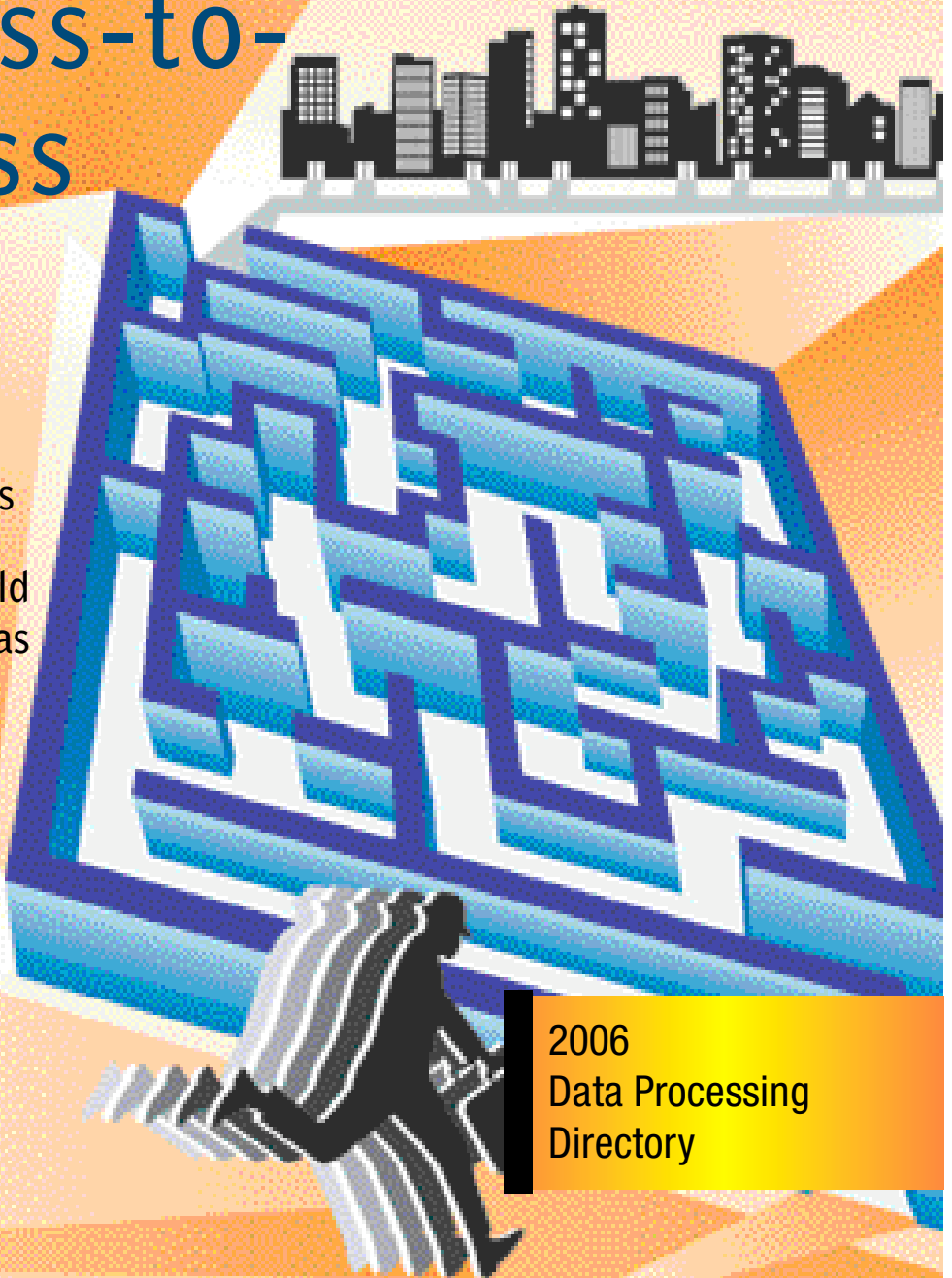
QUIRK'S

Marketing Research Review

MARCH 2006

Business-to-business issue

- > Getting past the B2B gatekeepers
- > On-site visits yield new product ideas for WD-40
- > Talking face-to-face with execs



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contents

case history

- 30 Loosening the wheels of innovation**
On-site research with tradesmen frees WD-40's new-product efforts
By Cara Woodland and Lauren Bierbaum

techniques

- 36 Hand, meet glove**
A look at both sides of the B2B research process
By Ruth McNeil
- 46 Overcoming the hurdles**
Recruiting and data collection in B2B research
By Jolene Vanthuyne
- 50 Unlocking the ties that bind**
Assessing the impact of emotional connections to brands
By Paul Curran, Bill Thomas and Camille Nicita
- 56 A supplier or a partner?**
To become the latter, research firms must avoid these 10 sales mistakes
By Rosie Balk

- 60 Finding a clear path to new ideas**
Use Delphi interviews to guide product development
By Daila Boufford

columns

- 18 By the Numbers**
Are you surveying the right professionals?
By Ron Weidemann
- 22 Data Use**
Thoughts on our overreliance on statistical testing in deriving consumer insights
By Jeffrey M. Kirk
- 26 Qualitatively Speaking**
Meeting executives face-to-face
By Margaret R. Roller
- 106 Trade Talk**
Two new B2B research books double your pleasure
By Joseph Rydholm

departments

- 8 In case you missed it...**
- 10 Survey Monitor**
- 12 Names of Note**
- 14 Product and Service Update**
- 16 Research Industry News**
- 16 Calendar of Events**
- 75 2006 Data Processing and Statistical Analysis Directory**
- 104 Index of Advertisers**
- 105 Classified Ads**



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In case you missed it...

news and notes on marketing and research



Organic goes private-label

Minneapolis-based grocer Supervalu has opened its first Sunflower Market store, a value-priced natural and organic foods retail outlet. Located in Indianapolis, the 12,000-square-foot store carries 8,000 to 12,000 SKUs of natural and organic products.



The store contains: grocery, frozen and dairy departments; produce and bulk foods; a deli and cheese area; an all-natural bakery and cafe; hormone- and antibiotic-free meat and seafood; beer and wine; and a wellness department. The Indianapolis store serves as a prototype for a Supervalu expansion plan that includes the opening of 50 Sunflower Market stores in five years.

According to Supervalu's consumer research, 96 percent of consumers use fresh organic produce at least occasionally. Research also indicates that while 66 percent of the U.S. population seeks organic products that offer nutritional, appetizing solutions for themselves and their families, the cost of organic foods is the most common obstacle for consumers. Sunflower Market aims to address that barrier by delivering organic products at a value price point. The goal is to provide foods that are organic wherever possible and minimally processed, with no artificial colorings, sweeteners, flavors or preservatives.

Supervalu will support the launch of Sunflower Market with the phased deployment of more than 200 private-label items marketed under the new "Nature's Best" brand. It will also make this private-label program available to its corporately owned and operated retail banners as well as to the approximately 2,200 independent retail locations to which Supervalu is the primary supplier. Additionally, Sunflower Market will use W. Newell & Co., Supervalu's specialty produce company launched earlier this year, to offer organic produce to customers.

Miller recasts Genuine Draft as an aspirational brand

It may be an act of brilliance or one of desperation, but Miller Brewing Co. is aiming older. In an attempt to boost its slumping Genuine Draft brand, the beer maker has launched a campaign that presents Genuine Draft as beer for people who have "come of age," which the company loosely defines as consumers who are 26 to 40 years old.

As writer Tom Daykin noted in a January article in the Milwaukee Journal Sentinel, that's a big departure in a business that has traditionally focused most of its marketing muscle on people ages 21 to 24 - a group that drinks 30 percent of the nation's beer, according to industry statistics.

The idea, Miller executives said during a January presentation to beer wholesalers in Milwaukee, is to market Genuine Draft as a beer with "mainstream sophistication" that appeals to a somewhat older set.

If successful, it could breathe new life into a brand that makes up roughly 10 percent of Miller's sales volume. That's an important goal for Miller, which has turned around its largest brand, Miller Lite, but still faces flat or declining sales among its other major brands.

"Our big idea can be summarized in three words," said Terry Haley, Genuine Draft brand manager. "Beer. Grown up." The goal for Genuine Draft, Haley said, is to reach people who are "strivers" and who want the type of mainstream style embodied in retailers like Target Corp., Starbucks Corp. and Ikea.

The campaign includes TV ads that show people being carded when they try to buy Genuine Draft. A bartender, waitress and store clerk all refuse to sell the beer because the customer is still in his 20s. "Do you really have to be 30 to appreciate the golden, rich flavor of Miller Genuine Draft?" a narrator asks at the end of each spot. "Taste for yourself."

Spots airing in March won't make explicit references to age. But they are devoid of the sophomoric humor that has been a staple of past beer ads. In one, people are shown getting ready to cross a red line: a man about to shave his soul patch, a couple buying a house. Those events are likened to the decision to drink Genuine Draft, touted as a flavorful, sophisticated brand.

The new ads are "definitely a zig" to the beer industry's "marketing target zag" of people ages 21 to 24, said Mark Silva, who operates Real Branding LLC, a San Francisco marketing firm. "My guess is that they're losing at the 21-24 battle...and decided to reinvest their money where their core consumer is, and where all the other brands fall off in attending to this crowd," Silva said.

Beer ads that declare a group of drinkers off limits to a particular brand have never been done before, said John Greening, associate professor of marketing at Northwestern University. The approach has some positive aspects, including the buzz that's being generated, he said. But it also could cause consumers to question whether other Miller brands are as good as Genuine Draft, said Greening, a former Anheuser-Busch account director at the DDB Chicago ad agency.

"Miller Ads Tap Into Aged Drinkers," *Milwaukee Journal Sentinel*, January 12, 2006

Kraft sends dinner ideas via RSS

As PROMO Xtra's Betsy Spethman reported, Kraft Foods continues to work hard at finding creative marketing uses for new technology. It has been quietly testing RSS feeds to deliver recipes to consumers' computers. Consumers visit kraftfoods.com/onthego to register for up to three daily feeds (easy dinners, seasonal desserts, top-rated recipes) which come directly to their desktop, bypassing e-mail.

It's one way to combat a decline in e-mail open rates, said Kathy Riordan, Kraft vice president-global digital and consumer relationship marketing. RSS feeds, which deliver syndicated content on topics that consumers specify, "could really transform the digital marketplace. It has the potential to be a disruptive technology," Riordan said. "Our focus has been so strong on Web and e-mail delivery that I don't want to miss a sea change in how consumers are having content delivered to them."

Kraft also is mulling ways to deliver recipes via cell phone, but "we haven't cracked the code yet," Riordan said. The challenges: how to display recipes on such a small screen, and use characters that consumers will understand. Kraft will keep tinkering as cell phone penetration rises.

"Kraft Invites, Tests Innovation," *Promo* magazine's Promo Xtra, January 18, 2006



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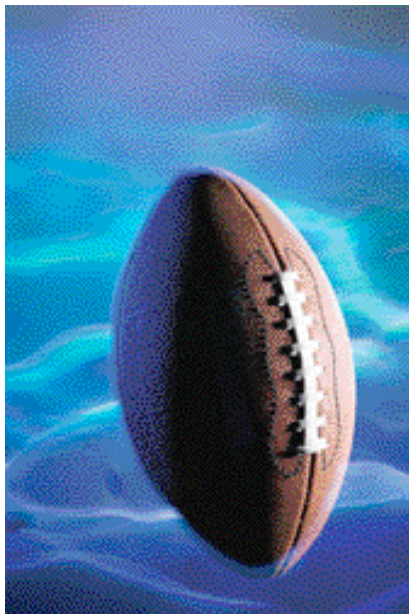
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Pro football still rules in the U.S.

Professional football continues to surge in popularity as one-third (33 percent) of U.S. adults who follow at least one sport say it is their favorite sport. This is up three points from 2004. Baseball slipped slightly again in 2005, dropping to 14 percent, down one point from 2004. Coming close on the heels of baseball is college football (13 percent) followed by



auto racing (11 percent). While both of these saw a rise from 2004 to 2005, racing was up four points in 2005, most likely as a result of NASCAR's increasing popularity.

These are the results of a nationwide survey by Harris Interactive, Rochester, N.Y., conducted online between December 8 and 14, 2005 among 1,961 U.S. adults, of whom 1,402 follow at least one sport.

In the past 20 years, professional football and baseball have seen the most dramatic changes in popularity. Since 1985, professional football has risen nine points in popularity (from 24 percent to 33 percent), while baseball has dropped the same amount (23 percent to 14 percent).

The next largest change in popularity is in auto racing, which has risen six points since 1985, from five to 11 percent. Men's tennis has seen a drop in popularity of four points in this same time period down to one percent from five percent in 1985.

The survey also finds some sizeable differences between different segments of the population. Pro football is most popular among African-Americans (47 percent), those with household incomes of \$50,000 to under \$75,000 (41 percent) and \$35,000 to under \$50,000 (40 percent), and among Generation X - those aged 28 to 39 - (39 percent). Those with a post-graduate education are least likely (23 percent) to call professional football their favorite sport.

Baseball does best among Hispanics (20 percent) and Echo Boomers - those aged 18-27 - (21 percent). African-Americans are least likely to say baseball is their favorite sport (6 percent).

College football is particularly popular among Republicans and those with post-graduate degrees (both 20 percent). Five percent of those with household incomes of less than \$15,000 cite professional football as their favorite sport.

Auto racing (which includes NASCAR) is most popular among those with a high school education or less (19 percent) and Baby Boomers (15 percent), while it fares worst among those with a post-graduate degree (2 percent) and Generation X (4 percent). For more information visit www.harrisinteractive.com.

Wal-Mart shoppers lag Target customers in Web use
Scarborough Research, New York, has released an analysis of the online purchasing patterns of shoppers of

retail behemoths Wal-Mart and Target, comparing them to all consumers in the 75 local markets measured by Scarborough. The analysis reveals that 52 percent of Target shoppers made an online purchase during the past year, versus 35 percent of Wal-Mart shoppers. Almost half (45 percent) of Target shoppers spent \$100 or more online during the past year, versus slightly more than one-third (35 percent) of Wal-Mart shoppers.

Scarborough found that Wal-Mart shoppers are either average or slightly below average for making purchases in several key shopping categories, while the opposite is true for Target shoppers. For example, Target shoppers are 25 percent more likely than all consumers to have made an online purchase in the clothing/accessories category during the past year, while Wal-Mart shoppers are 6 percent less likely to have done so.

"Demographics play a part in the higher Internet shopping among Target customers, since affluent consumers are more likely to be shopping online," says Karla Eyerly, manager, advertising marketer services, Scarborough Research. "Additionally, our data shows that Internet shopping is more prevalent in larger local markets, so Wal-Mart's heavy small-market concentration certainly plays into the equation. However, their recent push toward attracting a more upscale consumer could change this equation and help Wal-Mart attract more online shoppers in the future." For more information visit www.scarborough.com.

Health-conscious consumers still want comfort foods

A study on American health and well-being conducted by Landis Strategy & Innovation, Palm Beach Gardens, Fla., reveals a strong correla-

continued on page 64

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names of note

Joseph Waksberg, who helped invent a widely used method of conducting phone surveys so they efficiently reach people with unlisted as well as listed phone numbers, died on January 10 at a Washington-area hospital, said fellow survey researcher Warren Mitofsky. He was 90. With Mitofsky, Waksberg developed methods that improved the efficiency in drawing a representative sample of the population using random-digit dialing, a crucial technique in telephone polling. Waksberg, who was born in Poland and emigrated with his family to the United States in 1921, joined the Census Bureau in 1940 and stayed there for 33 years. He retired as the agency's associate director for statistical methods, research and standards. He then joined the Maryland statistical research firm Westat and became chairman of the board in 1990. He served for 30 years as a consultant on election night predictions for CBS and later for a cooperative of news media.

London research firm *TNS* has named former Chairman **Tony Cowling** president and special advisor. *TNS* named **Donald Brydon** chairman and added **Pedro Ros** to its board as managing director - global clients and sectors.

Separately, Cowling received the MRS Gold Medal from Britain's Market Research Society to celebrate his 40+ years of service to the market research industry.

Laura Kippen has been tapped as the new head of the service sector research practice division at *Market Probe*, a Milwaukee research firm.

Princeton, N.J.-based consumer products firm *Church & Dwight Co., Inc.* has named **Bruce F. Fleming** chief marketing officer. Marketing

research will be among his responsibilities.

Scarborough Research, New York, has named **Edwin Batson** to lead its newspaper custom research services division as vice president of custom research.

Patrick J. Burns has been named vice president of strategic planning and new business development at apparel maker *Kellwood*. He will work out of the company's New York office.



Burns

Slack

King Pharmaceuticals, Inc., Bristol, Tenn., has named **Dean Slack** vice president, business development and strategy for international, and the strategic marketing research department.

Research firm *Synovate* has named **Lisa Araj** vice president of client services for its travel and tourism group.

Madison, Ga.-based *Avado Brands* named **John Koch** vice president of research and development and culinary operations for the company. *Avado Brands* owns and operates two proprietary restaurant concepts: Don Pablo's Mexican Kitchen and Hops Restaurant and Brewery restaurants.

Jim Alimena has been named director of marketing at *BlumbergExcelsior*, a New York supplier of law-office products. Marketing research will be among his responsibilities.

Andrew L. Wing, president and CEO of *Nielsen Entertainment*, New York, has decided to leave *VNU* to pursue investment opportunities in media and entertainment. Wing will remain with *VNU* through March 31 to assist in the management transition.

Caryl Kahn has been named market research director at *Insight Research Group USA*, Summit, N.J.



Kahn

Lee

Vance Publishing Corp., Lincolnshire, Ill., has named **Steven U. Lee** to the newly created position of senior vice president of marketing. Marketing research will be among his responsibilities.

Stuart Carlaw has been named principal analyst, wireless connectivity, at *ABI Research*, Oyster Bay, N.Y. He will be based in London.

Eric LaBat has been named chief marketing officer for the Chicago-based Rail Services unit of *GE*. Marketing research will be among his responsibilities.

Norway-based research software provider *FIRM* has realigned its market research global account teams to New York and London. Heading up the New York team will be **Yaron Brenman**, vice president of sales. He will add to his client roster the accounts of both North and South America previously managed by

continued on page 103

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product and service update

Site offers translated reports on Asian opinion polls

The Mansfield Foundation, Washington, D.C., has launched its Asian Opinion Poll Database, which features English-language articles on policy-oriented public opinion surveys conducted by major Asian news and polling agencies. The Foundation has translated and posted on its Web site (www.mansfieldfdn.org) the results of surveys that focus on issues such as: public attitudes toward the United States, the U.S.-Japan alliance and other nations in Northeast Asia; perceptions of China's rising power and potential North Korean threat; regional economic competition; domestic political trends; and support for national governments and administrations.

The Asian Opinion Poll Database currently features surveys conducted by the *Nikkei Shimbun* (Japan), Cabinet Office (Japan), *Joong-Ang Ilbo* (South Korea), and *Dong-A Ilbo* (South Korea). The Foundation plans to expand this list of participating media and polling agencies, to include a broad cross-section of organizations in Japan and South Korea as well as the People's Republic of China. Over time, the surveys will be archived and commentary and analysis from prominent Asia experts will be added.

ArcSDE updated

Redlands, Calif.-based ESRI announced that with the release of the ArcSDE 9.1 Service Pack 1 its ArcSDE now supports Microsoft SQL Server 2005. ArcSDE is a server software product that accesses multi-user geographic databases stored in relational database management systems (RDBMSs). ArcSDE enables users to: integrate geographic information query, mapping, spatial analysis and editing within a multi-user enterprise DBMS; move from a distributed approach to an integrated environment; manage spatial data as a

continuous database accessible to the entire organization; and publish maps on the Web. ArcSDE 9.1 Service Pack 1 also includes performance improvements and maintenance fixes. It is available for download at <http://support.esri.com/downloads>.

New panels, new countries from Greenfield

Wilton, Conn.-based research firm Greenfield Online Inc. and its European subsidiary Ciao are now offering new proprietary online research panels across certain countries in Europe, Latin America and Australia. Combined, these proprietary panels offer clients access to more than 200,000 new potential respondents globally. The new panels include more than 85,000 panelists across European countries such as Sweden, Denmark, Norway and Portugal; a new Latin American panel with more than 50,000 respondents across Mexico and Brazil; and a new Australian panel with more than 70,000 respondents. For more information visit www.greenfieldonline.com or www.ciao-surveys.com.

Targeting system for newspapers

Fort Lauderdale, Fla.-based Simmons has launched Circulation Tactician, a household-based targeting system that allows newspaper circulation managers to find potential subscribers in their market that have the same behavioral characteristics as their best current-circulation customers. Circulation Tactician merges a newspaper's existing circulation data with Experian's INSOURCE database of U.S. households and delivers it on Simmons software including Microsoft's MapPoint.

Newsrooms can also use Circulation Tactician to understand their readers and select editorial content for their zoned inserts because it

has lifestyle and media consumption down to the zone level of interest. Newspapers can work with advertisers to select the most appropriate and most effective advertisements for their sections. For more information contact Mark Fauntleroy at 954-427-4104, ext. 160 or visit www.smrb.com.

Factiva beta tests Search 2.0

New York-based Factiva has introduced Factiva Search 2.0, which searches across Factiva's more than 9,000 sources. It delivers results organized by subjects, companies, industries and associated themes and presented in a graphical format for interactive navigation. Additionally, the discovery functionality identifies trends and themes around search topics and terms. At press time, Factiva Search 2.0 was in a beta version. The initial beta introduction includes results ranked by relevancy that can also be sorted by date in an alternative view. It provides contextual snippets where search results include the first occurrence of the terms so that users can quickly determine if an article is relevant. Additionally, recommendations are offered for company names and correct spellings. Searches that are recognized to include public companies will automatically surface stock quote information above the headlines. During the Factiva Search 2.0 beta period, Factiva will gather customer feedback to help clarify how to incorporate these capabilities into Factiva's existing products and services. For more information visit www.factiva.com.

New service measures Yellow Pages markets

Yellow Pages Market Reporter - a new Yellow Pages market measurement service from Knowledge Networks/SRI (KN/SRI) - will

continued on page 70



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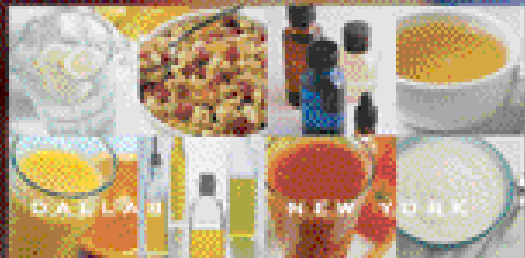
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research industry news

News notes

In mid-January, Netherlands-based **VNU** said it had received a non-binding proposal to purchase the company for EUR 28 to 28.50 per common share from a private equity consortium consisting of AlpInvest Partners, the Blackstone Group, the Carlyle Group, Hellman and Friedman, Kohlberg Kravis Roberts and Co., Permira and Thomas H. Lee Partners. This proposal was made by the private equity consortium after several weeks of diligence and access to VNU management. VNU said it will proceed with discussions with this private equity consortium as VNU continues to weigh alternatives and evaluate what course of action will

serve the best interests of its stakeholders.

Acquisitions/transactions

Opinion Research Corporation, Princeton, N.J., has sold its teleservices segment and closed certain non-strategic market research operations. Effective December 31, 2005 the teleservices segment was sold to a management group in exchange for the assumption of all liabilities and the potential for future payments from the buyer. In addition, the company expects that the transaction will generate a material cash tax benefit. A company press release stated: "Although the historic profitability of this business unit met our expect-

tations and exceeded that of its industry, the recent decline in revenues and the resulting losses have made such a sale a desirable transaction." In addition, the firm announced the closure of market research operations in South Korea and Mexico and one of its domestic call centers.

New York researchers **BuzzMetrics** and **Intelliseek** announced an agreement in principle under which BuzzMetrics will acquire Intelliseek. The firms' technologies mine publicly archived online sources including blogs and discussion forums. Upon closing of

continued on page 72

Calendar of Events March-June

The Center for Social Science Research at George Mason University, Fairfax, Va., will hold its Applied Research Training Series at its Fairfax campus. The series has been developed to provide attendees with access to workshops on specific topics in the field of social research. Topics and dates are: content analysis - March 24; writing successful applications for research funding - March 31; in-depth interviewing - May 19; focus groups - May 19; conducting effective surveys - June 8-9; how to design and implement useful program evaluation - June 15; finding and using existing data - June 16. For more information visit <http://cssr.gmu.edu/series/series.html>.

ESOMAR will hold its Asia-Pacific conference on March 19-21 at the JW Marriott Hotel Mumbai. For more information visit www.esomar.org.

The Institute for International Research will hold the Conference on Marketing on March 20-22 at the Venetian hotel in Las Vegas. For more information visit www.theconferenceonmarketing.com.

The Advertising Research Foundation will hold its annual conference on March 20-22 at the Marriott Marquis Hotel in New York. For more information visit www.thearf.org/conferences/annual.

Britain's Market Research Society will hold its annual conference on March 22-24 at the Barbican, London. For more information visit www.mrs.org.uk/res06/.

The twelfth Sawtooth Software conference on acquisition and analysis of market research data will be held on March 29-31 in Delray Beach, Fla. For more information contact Danell Neibuhr at 360-681-2300 or visit www.sawtoothsoftware.com.

Salford Systems will hold a conference on data mining on March 29-31 in San Diego. For more information visit www.salforddatamining.com.

The Society of Competitive Intelligence Professionals will hold its annual conference on April 26-29 at the Disney Coronado Springs Resort in Orlando, Fla. For more information visit www.scip.org.

Arden Hills, Minn.-based research firm Anderson, Niebuhr & Associates will hold a workshop on questionnaire design and use on April 27-28 in Minneapolis. For more information visit www.ana-inc.com.

IIR will hold its Fuse: Brand Identity and Package Design event on April 24-26 at the Waldorf-Astoria in New York. For more information visit www.iirusa.com/BIPD.

ESOMAR will hold a conference on global diversity on May 8-10 at the Eden Roc Renaissance Resort and Spa in Miami. For more information visit www.esomar.org.

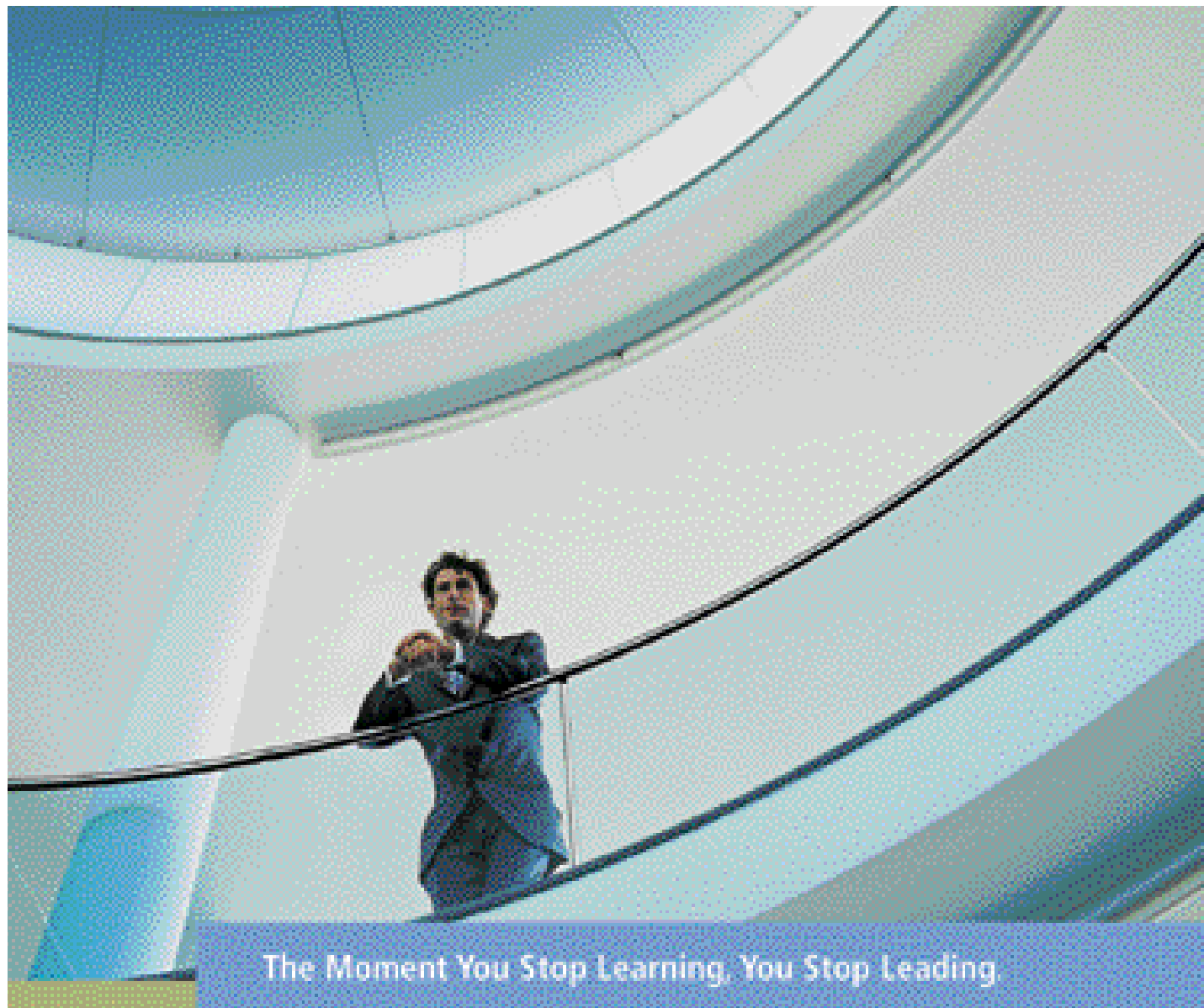
ESOMAR will hold Innovate 2006, a conference on research innovation, techniques and technology, on May 10-12 at the Eden Roc Renaissance Resort and Spa in Miami. For more information visit www.esomar.org.

Arden Hills, Minn.-based research firm Anderson, Niebuhr & Associates will hold a workshop on questionnaire design and use on May 11-12 in Orlando, Fla. For more information visit www.ana-inc.com.

Research software firm Pulse Train will hold its annual users conference on May 10-12 at the Hilton Diagonal Mar Hotel in Barcelona. For more information visit www.pulsetrain.com/PTC2006.

Canada's Marketing Research and Intelligence Association will hold its annual conference on May 31-June 2 at the Westin Hotel, Calgary. For more information visit www.mria-arim.ca.

ESOMAR will hold WM3, a conference on worldwide multimedia measurement, on June 4-7 in Shanghai. For more information visit www.esomar.org.



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The problem is, potential respondents also have dollars to gain – incentive dollars. These incentives motivate some respondents to cheat, to try to qualify for studies they should not gain access to. Since business professionals earn higher incentives than an average consumer, more people try to sneak into studies geared for business professionals. How happy would you be if you found out that a clever college student collected a \$100 incentive to give his opinion on a new heart valve? Or a high-school senior provided his feedback on the relative importance of features in corporate enterprise security software and

walked away with \$50 in beer money? Here are some proven methods to help remove the wrong kind of professional respondents from your study.

First: Be careful about how much information you provide regarding the study's topic.

Too much detail allows the “professional” respondents to maneuver their way through a screener. If your introduction states that your study is about how people use their MP3 players, then respondents know they need to check “yes” when asked whether they own an MP3 player. The caveat is that some general information on the study topic needs to be provided. Otherwise some people will not agree to the study because they don’t know what they are getting themselves into. An alternative introduction could indicate that you are interested in people’s habits when listening to music.

Second: Focus closely on the screener questions.

The purpose of a screener is to

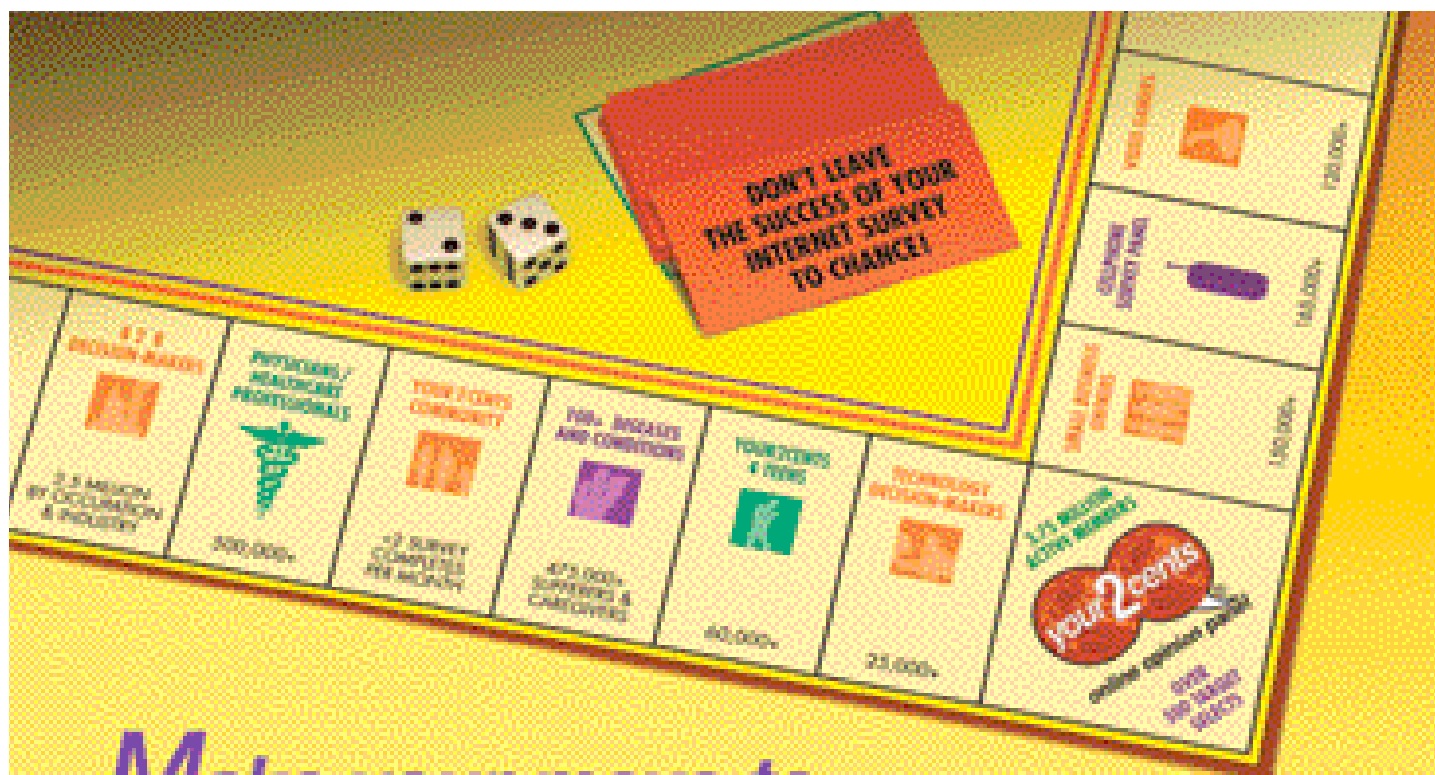
Editor's note: Ron Weidemann is client service manager at Answers Research, Solana Beach, Calif. He can be reached at rweidemann@answersresearch.com.

accurately identify the correct respondent and screen out unqualified respondents. However, not all screeners are created equal. Here are four key characteristics that good screeners follow:

1. Avoid using yes/no questions: A “professional” respondent has a 50 percent chance of choosing correctly if the question only has two choices.

2. Be cautious of leading questions: Sometimes the question wording can leave clues as to what the researcher is looking for. Instead of asking “Do you sell notebook computers?” ask “What type of computers do you sell?” The response list should include desired responses as well as undesired responses. This way the “professional” respondent will have a lower chance of selecting the right answer.

3. When practical, combine demographic profiling questions with occupational questions to screen out



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illogical answers and filter out unqualified respondents. For example, it is very unlikely that a neurosurgeon has less than a certain number of years of education and must be at least a certain age. If answers to age and years of education do not match with job descriptions, something is probably wrong. There are not many 19-year-old neurosurgeons.

4. Do not terminate any respondent until all screening questions have been answered. If a respondent is terminated on the question which disqualified him, he may be able to sneak back into the survey and choose a different answer. This process could potentially be repeated until the “professional” respondent gets through the whole screener. This is possible because some respondents have joined Web panels using multiple e-mail addresses.

Third: Monitor the incentive amount.

The higher the incentive, the more effort a “professional” respondent

will go through to be involved in a study he is not qualified for. Still, you do not want to underpay. Consider a respondent’s time and profession when determining an appropriate incentive. There are expected levels of incentives for certain professions and paying below these standards could lead to dissatisfaction among qualified respondents or higher costs in recruiting. It is also a good idea to stress the value of participation. This encourages responses motivated by altruistic desires rather than purely economic incentives or greed.

Incentives will vary by country, especially since the legalities of incentives vary by country. Also, incentives may not be necessary for some surveys. If you are surveying from a panel, the panel company should have a system in place for paying its members.

Gaming the system

“Professional” respondents know they have an opportunity to make a lot of money and win the challenge

of gaming the system. The problem is widespread across panel communities and panel companies are taking drastic, aggressive measures to curb this problem. Common approaches are phone validation, allowing only one panelist per home address, etc. Approaches such as this are broad-brush attempts to solve the problem. “Professional” respondents are resourceful, and their innovations to gain illegitimate access to your surveys are constantly evolving.

It is the researcher’s job to insure the integrity of the data collected within a survey by insuring the respondents entering and completing your survey are qualified to do so.

Remember, most surveys are custom and with that comes custom approaches to keeping unqualified respondents out. The goal is to eliminate unqualified respondents without making the survey (or the screener) too cumbersome for the qualified respondents whose feedback is so critical to your organization’s success. | Q

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Thoughts on our overreliance on statistical testing in deriving consumer insights

Most practitioners in the consumer packaged goods (CPG) marketing research arena have never had more than an introductory-level class in inferential statistics, if any formal statistical education at all. The statistical training that most researchers rely upon is an on-the-job crash course in statistical testing from supervisors or co-workers in the context of learning the day-to-day requirements of their positions.

Additionally, statistical testing has long been automated by tabulation packages such as Quantum, a necessity given the massive amounts of data we collect and process in this industry. The process has become such an efficient one that too many of the data tabulations that leave the hands of the supplier are not accompanied with the necessary consulting or proper interpretation of the insights therein.

By the same token, many of the researchers at client organizations also lack the fundamental statistical training to properly interpret significant results. Although understandable that most practitioners' jobs do not require

an intimate knowledge of statistics (which is why I am gainfully employed!), this lack of interpretive ability with regard to hypothesis testing, or statistical testing, has dampened our effectiveness at providing value and delivering consumer insights.

The inertia resulting from many years of efficient process has produced a culture that hangs its hat on the results of statistical testing in banners but that does not foster an understanding of the real value in a statistical test. The practical use and proper interpretation of statistically significant results has largely been forgotten among client- and supplier-side researchers alike. Too often, because paging through hundreds of pages of data tabulations can be an overwhelming (and unpleasant) task, we have come to rely on scanning banners for those upper- and lowercase stat-testing letters to suggest to us which findings may be of interest. However, "statistically significant" does not necessarily imply "important" - it never has - although that is precisely how many of us erroneously

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interpret statistical differences.

Statistical testing can be a valuable tool in guiding business decisions that are derived from study results; however, we are in need of a refresher on the proper interpretation of statistical testing. I enjoy sharing with others my personal mantra, which summarizes my perspective: Statistical testing is no substitute for good judgment.

Discussed here are the two principal ways in which statistical testing is regularly misused: 1) interpreting "non-significant" findings as not meaningful; and 2) placing too much emphasis on findings that are statistically significant.

Focusing on the big picture: when "too few" findings are statistically significant

I have long been an advocate for employing a holistic approach to data analysis, part of which entails not



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being overly dependent on the outcome of statistical testing but rather focusing on the story that the data tell in totality. In too many cases, we are too stringent in our requirement that a key measure be statistically significant in order for us to glean insight from it. I cannot make this point clearer than with a quote from what some academic institutions refer to as the statistics bible:

“A test of significance is sometimes thought to be an automatic rule for making a decision... This attitude should be avoided. An investigator rarely rests [his or her] decisions wholly on a test of significance. To the evidence of that test, [the investigator] adds the knowledge accumulated from his own past work and from the work of others.” (Snedecor and Cochran)

This nugget of traditional wisdom, published in 1967, is as relevant as ever to research today. In the case of marketing research, the results from

any one study do not stand alone. Rather, they must be interpreted in the context of 1) the researcher's knowledge of the business, 2) related primary research, including qualitative and quantitative, and 3) any relevant secondary research.

Even within a study, a single, non-significant (or “directional”) difference interpreted outside the context of other findings from the same study is not very meaningful. It is when this finding is compared with the trends in consumers' ratings and reports on other measures that its value (or lack of value) is fully understood.

Of course, I acknowledge that there are certain situations in which a go-no go decision has greater risk for the enterprise (e.g., launching a potentially inferior product formulation), and the criteria for making decisions need to be more stringent. However, in the majority of cases, we will develop much richer consumer insights if we evaluate and consider even directional effects that tell a

consistent and convincing story. In other words, to extract maximal value from our data, it is necessary that statistical rigor be balanced with human analytic reasoning.

The flip side of the coin: when virtually every finding is statistically significant

Advancements in Internet technology have made consumers more accessible to researchers and more willing to participate in survey research. Obtaining large representative samples of almost any population can generally be accomplished quickly and cost-effectively. The positive impacts of these advances in marketing research have been an increase in robustness and reliability of samples. The potentially complicating consequence is in the interpretation of results. We all know that sample size is the biggest contributing factor in determining whether a difference is statistically significant. So, depending on just how large the sample becomes, we may find ourselves wading in an ocean of statistically significant differences. When this occurs, our reliance on statistical testing to direct us toward meaningful differences falls apart.

In a recent large-scale brand evaluation study, most mean attribute ratings were found to be significant at the 99 percent level. When looking at the actual means, they were identical when rounded to one decimal place. A similar study showed that even 1 percentage-point differences in Top 2 Box ratings between groups were significant at the 99 percent level. Do we want to make a big fuss over a 0.1 mean difference in ratings or a 62 percent versus 63 percent on a Top 2 Box basis?

The statistical bible offers counsel on this issue as well. The authors put forth that a statistically significant difference should be ignored if the magnitude of difference is not of “practical importance.” When was the last time most of us chose to ignore a statistically significant finding?

Of course, the next logical question raised by this directive is, “How do I determine ‘practical impor-

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tance'?" Unfortunately, the answer to this query is much less straightforward. Determining practical importance – or, rephrased, importance to your business – cannot be answered by statistics: that decision requires the analyst's judgment and category/brand expertise. Many companies have smartly made the decision on criteria for action standards an *a priori* part of the research process. For example, a consumer products company may require that a new product formulation be preferred by consumers two-to-one over a current product in order for it to be launched. These kinds of decisions can be much more difficult to make if they are made *a posteriori* (after fielding and data tabulation is complete). Nonetheless, in these large-sample situations, which will only become more common in the industry, the onus for setting decision criteria will fall increasingly on the marketing researcher's judgment.

Rely on judgment

In summary, statistical testing has its place, but cannot be used as the exclusive decision maker. An analyst must rely on his or her own judgment to interpret each study by assimilating multiple findings using the analyst's own category and brand expertise to derive meaningful consumer insights for his or her business. In short, a call to look beyond the upper- and lowercase letters is warranted. A loosening of our dependence on statistical testing to make business decisions is in some cases a necessity. After all, the decisions made as a consequence of interpreting CPG survey research do not carry with them the same gravity or social impact as those from clinical trials, medical research or some of the other physical sciences. It is often said among practitioners that marketing research is not brain surgery. Although it is usually said tongue-in-cheek, the rain may lay a scintilla of wisdom. | Q

Reference

Snedecor, G. W., and Cochran, W. G. (1967). *Statistical Methods*. Ames, Iowa: The Iowa State University Press.

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Meeting executives face-to-face

In today's fast-paced research world, where the designers and users of research scramble to move towards a more tech-savvy design solution, there is still a firm place for the traditional, face-to-face executive interview. Corporate managers may be accessible in a variety of other modes but nothing provides the richness of an individual (the professional interviewer) sitting with another individual (the corporate interviewee) in his/her environment for the sole purpose of intensely exploring topic-specific attitudes and behavior.

Looking to improve upon their own executive interviews, clients have asked for the secrets or parameters that contribute to a successful executive interview study. If success is measured by the depth of input and insight as well as efficiency (i.e., in terms of getting to a completed interview), then there are at least six necessary components to the face-to-face executive interviewing design model.

1. Positive preliminary contact and scheduling

A successful executive interview begins with establishing a positive relationship with the interviewee prior to the interview. In addition to scheduling the interview appointment, preliminary contact lays the foundation for the positive rapport necessary when the actual research interview is conducted.

The preliminary contact should play to the interviewee's ego and be respectful of his/her professional status. For this reason, cold-calling is never appropriate and the preferred form of contact is a brief letter (on the client company letterhead) sent to each potential interviewee. This letter should outline: the purpose of the interview; the benefit to be derived from participating in the interview (e.g., how interview responses will be used to improve their business operations); the promise of confidentiality; and, the researcher who will be calling to set an appointment for the interview. This letter

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should clearly state who will be calling (this should be the research interviewer) and when the interviewee should expect the call.

Careful scheduling of interview appointments is also important. During the interview, the interviewee should feel that the interviewer is relaxed and has plenty of time to discuss the issues rather than feeling forced to move quickly through the interview to get to the next appointment. This is why executive interviews are typically scheduled no less than two hours apart, providing an hour for the interview and an hour for the interviewer to make notes and travel to the next appointment.

2. Clearly-defined and achievable goals

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10-24	4%	31%	40%	17%	37%
25+	1%	11%	13%	5%	14%
Average # Surveys	2.6	12.3	13.1	7.0	16.8

*Self-reported data from multiple panels and surveys conducted Q4 2020.

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interview should be targeted at clear, succinct goals that are deemed achievable within the confines of the interview. These goals should be highly specific - e.g., reactions to a particular product/service idea or line extension based on current usage/need (such as a new insurance product from an established bank) - rather than general in nature - e.g., attitudes towards broad concepts (such as an all-in-one financial service).

3. Flexibility - personalizing the interview

Each interviewee is different from the others. And, indeed, most interviewees will tell you that their business is unique or they are otherwise in a unique situation as it relates to the topic. While some are less unique than others, there are always nuances that prevail. For this reason, a critical interviewing skill is the ability to adapt to the situation and modify the interview as necessary. This may mean rewording questions as well as adding or deleting sections of the interview.

4. Distinguishing between useful and not useful input

Equally important to being flexible is the ability to identify useful input based on the pre-established goals of the interview. There are many instances when the interviewee may unintentionally confuse

the interviewer and steer the discussion away from its goal. For instance, the interviewee may get sidetracked in his/her comments, may misinterpret the interviewer's question (and, instead, answer an irrelevant question), or may simply relate to the topic from a unique point of view which carries the interviewee's train of thought in other directions. It is the interviewer's job to re-focus the interview as necessary. It is not uncommon, however, for portions of an interview to be omitted from subsequent analysis due to lack of relevance.

5. Listening skills - exploring what is said and not said

Listening skills involve more than just keeping quiet and letting the interviewee talk. While this is important, it is equally important to really listen to what is being said and ask yourself, "Do I have a clear understanding of what this person is saying? Can I repeat, in my own words, the point this person is trying to make?" It is interesting how often interviewers think they understand the interviewee but, in truth, are unable to fully explain the interviewee's comments. To this end, interviewers should not shy away from diligent probing but be comfortable in the fact that most people are flattered that the interviewer is taking the time to appreciate his/her point of view.

Take, for example, the word "quality." The interviewee may say that he/she looks for a bank that provides quality service. What does that mean? How does the interviewee define quality? It is surprising how many different definitions of quality exist. This is a simple example but it pertains to a wide variety of words or issues that surface in qualitative interviews.

Listening skills also involve the ability to appreciate what is not being said. It is important for the interviewer to pay attention to the verbal and behavioral cues provided by the interviewee. For instance, the interviewee may initially express praise and satisfaction toward the client company but the interviewer may not observe the usual signs of conviction and feel that the interviewee is holding something back. Being sensitive to this, and after careful questioning, the interviewer can encourage the interviewee to share important information that could have otherwise gone undetected.

6. Limited researcher involvement

The successful utilization of the first five parameters hinges greatly on limited researcher involvement. Ideally, just one senior researcher will execute the initial contact, the scheduling and the goal-setting as well as the interviews and analyses. While a study including 30 or more face-to-face executive interviews may be a challenge for a single researcher, it is the necessary glue that ensures the overall integrity of the design.

Elegant design

Face-to-face executive interviewing may not be fashionable and may not be fast but it is an elegant research design that effectively minimizes error while maximizing ultimate insight. That is why this traditional study design will always play a prominent role in qualitative research. | Q

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By Cara Woodland
and Lauren Bierbaum

business-to-business research

Loosening the wheels of innovation



Over 83 percent of households have a can of WD-40 somewhere within their home. The all-purpose cleaner, protectant and lubricant in the familiar blue and yellow container has been an integral part of daily work for the professional tradesman and the average homeowner for over 50 years. The product is marketed in over 160 countries and had sales of \$263.2 million in the 2005 fiscal year. The past long-term success of the WD-40 company stems almost entirely from the company's flagship, the WD-40 brand.

This golden-egg brand had little innovation in its first 40 years. In 2003, San Diego-based WD-40 Company started a project to reinvigorate the brand. A cross-functional team, internal and external to the company, gathered to look at those

who used the largest amounts of WD-40 - professional tradesmen. The team participated in site visits with mechanics, landscapers, construction workers and other small-business owners to observe and talk about their use of WD-40-type products. These methods allowed the team to immerse themselves in the end-users' environment, truly understand the context of product usage and determine ways in which lubricant products met, or failed to meet, their daily professional and at-home needs.

On-site research with tradesmen frees WD-40's new-product efforts

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Interesting discoveries

The WD-40 core team made a number of interesting discoveries throughout the ethnographic research. One insight was discovered through making an analogy to another customer need after observing a mechanic. While showing the team his toolbox, the mechanic discussed how he cut his larger tools in half to get into the tight engine compartments of foreign cars. “If you’ve been working on something for an hour, then you just cut the tool to get it in there,” the mechanic said. Even with the tool cut in half, its size was hard to manipulate in tight spaces. Similarly, despite having a small can size, WD-40 could not actually be applied in tight spaces. Furthermore, the core team discovered that the amount of WD-40 applied was often more than needed in those tight spaces, which

caused drips and messiness. For the mechanic, this resulted in his customers getting the lubricant on their clothes and then complaining to him.

Participants in the ethnographic study reported a need to “direct [the product] where it has to go” and a desire for a “nozzle hose,” which could be “used to spray on specific areas of the machine.” Participants remarked that they adapted the current WD-40 delivery system – an aerosol spray can with a thin straw attachment – to suit their own needs. Another small-factory worker had rigged a soda bottle with a dripper to apply a small amount of lubrication to a rotating wheel every so often. The core team recognized a disconnection between their product’s myriad of uses and the actual application of that product in the field.

Another key insight from the site

visits was from the excavator, who leaves his “tools,” such as back hoes and tractors, outdoors throughout the year and unsheltered from the elements. In his case, he was not using WD-40-like products as a lubricant, but rather a protectant for his company’s investments. In fact, he was using cans and cans of the product at one time to spray down his pistons, snow plows or other expensive assets. In his words, “I like to overdo it. Preventative maintenance is well worth the money. I’d rather spend a \$1.29 for a can than \$5,000 for a new piston. I don’t have a rule of thumb, but I use a whole can.”

Finally, the core team heard from the road construction worker about his frustrations with WD-40-like products. He used WD-40 to penetrate rusted sign bolts or to remove road tar from tools and often required the use of the signature



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WD-40 red straw. As a construction worker, he was required to work year-round in some extreme outdoor conditions, and when it was freezing outside he was bundled up with layers of clothing. During these times, it seemed the straw often disappeared and, if did happen to be found, his heavily gloved hands fumbled with the thin straw when trying to insert it in the can nozzle. His description of the frustration was much more colorful than

the excavator. Although we can't reproduce it here, suffice it to say that the description definitely stuck with the core team, and they knew they had to fix the issues with the straw disappearing and its difficult nozzle connection.

As a result of the core team's ethnographic research many themes emerged. One key need was to package WD-40 in a way that allowed multiple ways of delivering and applying the product. The WD-40 product needed to be applied in small and large amounts for the mechanic and excavator, produce a wide-area spray for the excavator and also precisely reach targeted and tight areas for the mechanic and factory worker.

Insights into action

Based upon the findings and insights gleaned from the ethnographic observations and interviews, the WD-40 Company core



The No-Mess Pen fared poorly in initial research with tradesmen. But subsequent focus groups identified a different, and heretofore untapped, market for the product: women with household uses for WD-40.

WD-40 delivery method that operates like a marker, allowing for highly controlled application of WD-40 to any number of tight spaces. The second concept was a wide-dispersion spray nozzle, similar to fogger products, attached to a larger can of WD-40. The third concept was a hinged straw attached to a can of WD-40, which could be pivoted to be in or out of use depending on customers' needs. All three of these concepts were nominated by the core team to the final portfolio from the brainstorming session.

As a next step in the product development cycle, the WD-40 Company created digital prototypes of these concepts to test using Instant Response. Instant Response testing is a central-location quantitative and qualitative technique used to evaluate product concepts by a large group of potential customers at once. During the quanti-

team conducted a brainstorming session to develop new product ideas that could address the concerns of end users. During that innovation brainstorming session, nearly 300 possible product concepts were generated. Among those ideas were three seed concept ideas that seemed most likely to meet the multiple delivery systems customer needed.

The first was a targeted precision-point concept – a hand-held

tative portion of the technique, respondents are asked to enter Likert-like scaled responses to questions such as product design, packaging, purchase interest and usefulness using hand-held keypads. Instant Response provides immediate quantitative feedback on product concepts to the core team watching in the back of the room. Following the quantitative portion, a subset of the respondents are selected to participate in a short focus group to discuss the data from the quantitative session. As such, Instant Response allows for more probing qualitative feedback as well.

For the Instant Response testing sessions, professional tradesmen were recruited. Machinists, mechanics and other large-quantity users of WD-40 participated in three Instant Response sessions. During the sessions, these end users evaluated the usefulness, uniqueness and likelihood of purchase for a variety of concepts, including the



Respondents said a fogger-like version of WD-40 would let them cover large areas more efficiently than a standard-style container.

three multiple delivery mechanism concepts from the portfolio of the brainstorming session.

Interestingly, the WD-40 No-Mess Pen prototype, which was a marker-type precision delivery system, fared extremely poorly in the Instant Response sessions. Despite the identification of the need for target precision delivery of WD-40 among this group of end users, the No-Mess Pen was not well-received by them. Focus groups conducted immediately following Instant Response sessions probed the negative reactions. Large-quantity users did appreciate the targeted precision of the No-Mess Pen but saw major drawbacks to its small size – a machinist using gallons of WD-40 each month requires far more capacity for any single job than a No-Mess Pen can handle.

However, the focus group discussions did identify a different, as yet completely untapped, market niche for the WD-40 No-Mess Pen: women with household uses for

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WD-40. Many of the laborers exclaimed that their wives or significant others would probably use the pen. The pen delivery system made more sense for household use than for machine equipment and the vast number of applications for WD-40 solvent makes it ideal for household cleaning and maintenance. As a result, the WD-40 Company conducted online quantitative research with women and found that over

two-thirds of women would buy the product. An initial in-home usage study with over 40 women found that the product should target both men and women but primarily focus on women. The research also found that the pen would be bought in addition to a can of WD-40.

The other two concepts - aptly named WD-40 Big Blast (for the wide-area dispersion spray nozzle)

and WD-40 Smart Straw (for the hinged straw application) - had extremely high scores for uniqueness, purchase interest and usefulness. In both the quantitative and qualitative portions of the research, there was an audible sigh of relief when the Smart Straw concept was introduced. This concept was given to industrial designers to determine potential ergonomic designs for the straw. The Big Blast concept went on to the technical development of the nozzle and a qualitative product use and package test to further validate the concept.

Paved the way

After three years, WD-40 has launched all three products. The WD-40 Big Blast was launched in the winter of 2004 into the traditional channels of automotive, hardware and home improvement stores. The introduction was complemented with trade publication advertising and a public relations campaign. Both the WD-40 No-Mess Pen and WD-40 Smart Straw were introduced into the big-box do-it-yourself home improvement stores in early summer 2005 and mass merchants in late summer/early fall 2005.

By using ethnographic and other types of research the company identified and brought to market a host of promising new versions of its bread-and-butter brand. It also brought the voice of the customer into its product development process and paved the way for future innovations.

The three products have been selling well in all distribution channels. At the end of the first quarter, sales were up 14.4 percent in the lubricant market. "We are continuing to make progress in our product innovation program and in growing our fortress of brands," says WD-40 Company CEO Gary Ridge. "During the quarter we had a positive impact from the new WD-40 delivery systems across the globe. We are on-target with the rollout of these products." | Q

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Many who commission business-to-business (B2B) research have specialist knowledge of their sector or industry but relatively little direct experience of B2B research or of the potential benefits, drawbacks or pitfalls of market research in general. Larger companies such as American Express, FedEx, Dell, Microsoft, Nokia and HSBC are likely to have in-house B2B market research specialists (and perhaps sector specialists within the B2B market). However, many companies – even sizeable ones (in industrial sectors, for example) – do not have staff with this expertise. Hence, it is a good idea for those undertaking B2B research to gain some understanding of the research process and what might be achieved. In particular, if external agencies are used, it is important that they feel they are in good hands.

What it is like being a B2B client?

Many B2B clients are not themselves researchers, and often feel rather in the dark about what is expected of them and what they should do. For example, one of my projects was for a government-affiliated agency operating across the world. The IT department wrote the brief (RFP, or request for proposal) and was sponsoring the research, but had no intimate knowledge of research practice. In circumstances like these, it is critical that the proposal is clear, that it outlines the design and assumptions, the expected outcomes, and that it explains the technical terms used. The proposal should provide process charts with “who does what” (client or researcher) laid out clearly so there is no mistaking what the research will be covering, what the different roles/responsibilities are, and what the likely output and timetable will be.

Responsibilities of the B2B client

What are the steps and tasks that the B2B client needs to look after? The main responsibilities are

covered below:

1. Explore with the internal client the main reasons for undertaking the research (qualification of the problem or business issue at hand), and what, if any, budget limitations or timelines may apply.
2. Draw up a brief (or RFP), with due internal consultation. It must explain clearly the background to the issue, what the issue is, and give information on any previous relevant research, known limitations, and any suggestions about how the research might be best approached. For example, “We would suggest adopting a qualitative approach here as



By Ruth McNeil

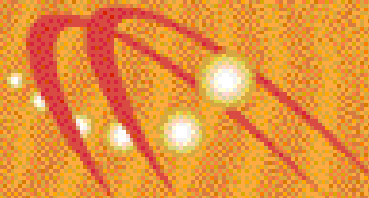
A look at both sides of the B2B research process

Editor's note: Ruth McNeil is managing director of Response Consulting Ltd., a London research firm. She can be reached at rmcneil@tiscali.co.uk. This article is adapted from McNeil's book Business to Business Market Research, published by Kogan Page (www.koganpage.com).

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the sample is so small and individuals are difficult to get hold of.”

3. If external help is required select individuals or agencies from whom a proposal is requested.

4. Assess incoming proposals in response to the brief in relation to criteria such as understanding (not just restating) the specific concerns and issues at hand, knowledge shown of the sector or market and previous experience (of this or analogous problems in a different category), research design, suggested techniques to assist an understanding of the issue at hand, and ability to undertake the project in time and on budget.

5. Commission the research and coordinate paperwork with internal accounts; sort out and pre-book currency if the research is multinational and this is an issue.

6. Allocate a single contact point for market research liaison (and sometimes a specific team in the client company whose input can be used). This individual will be responsible for coordinating input to the

process, reviewing and approving things like the final research design, screening criteria, topic guide, questionnaires developed, expert briefing papers (on language, technical terms, etc.). He or she should attend any briefing of interviewers (if desired), and ask for regular updates from the agency in terms of field process, such as number of interviews completed and reporting progress.

For very large projects, different coordinating “hubs” may be needed regionally or divisionally instead of just one single contact point. A corporate-wide employee commitment study undertaken by an Australian colleague provides a good example. At the beginning of the project, a steering committee was established comprising the MR manager, the HR manager, and four members representing key business divisions and separately-operating company units. Further, project leaders were chosen in each division to facilitate information about the research project and to encourage questionnaire return.

(Several prizes were awarded for a high response rate – in this case, it was typically over 80 percent.)

7. Agree on analysis formats (reviewing a report template if submitted by the agency) and outputs with the agency.

8. Review any presentation drafts before delivery to the final internal audience, so that appropriate language or terminology can be used, and there are no surprises.

9. Arrange a presentation or debrief with relevant staff to suit the internal audience and attend the debrief (including helping with any equipment needs).

10. Ensure the results are communicated to any external audiences, to internal audiences such as the board, the management team, those working in the call centers, new product development and so on, in as accessible a format as possible – including, for example, notes on a Web site. Here the medium is as important as the message – keep it short and make people want to know the results.

In general, you need to work throughout the project as the representative of the company with the research agency to ensure it understands the brief, is on track and is delivering what was agreed (barring serious complications). As much as you can, ensure the research findings are used and that any survey contributes to company policy and action rather than gathering dust on a shelf (or taking up file space). It is important to ensure that staff understand the findings and implications, manage the knowledge gained and use the research to leverage the brand’s DNA.

Key aspects

There are some key aspects worthy of special attention that will expedite the whole process and assist in producing quality outcomes. As a B2B client, if you can, familiarize yourself with the basics of research and have an idea of the sort of work that might be required. Have an idea of the size of project you might need (small, medium, large; single or

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multi-country) and what you can pay for (limited budget or whatever it needs, because of the magnitude of the issue).

Determine:

- The key business issues or questions to which you want answers – ideally via internal consultation with those who are involved in needing the research to be conducted.

- Whether it is possible to develop some hypotheses for inclusion in the study about the possible reasons for, causes of, or contributing factors to the issue/problem at hand, and if there are any special groups whose reaction/views might be somewhat different. For example, do you suspect that the high-spending, technologically-advanced customers will likely be twice as willing to try the new service as the lapsed?

- Who should be interviewed and what are the sampling issues associated with that? For example, can the company provide sample (contact) lists and in what ratio, with what facility? Are there any key segments that need to be included?

- What actions might be taken if a given result is found (“action standards”)? The aim here is to understand if different possible outcomes mean different types of action and to determine if the company can (or will) act on information gathered. (Action standards are more commonly used in consumer research but can play a role in B2B at times.)

- Are there any analogies with other industries/businesses/brands from which lessons can be learned?

- Can any B2B research be combined with any other sources of data, for instance customer research feedback aligned with churn statistics or numbers of complaints received or sales records, so that the total is greater than the sum of the parts?

- What are the internal time frames that allow a realistic timetable for the research while meeting internal deadlines? For example, a research executive summary might be needed by September 15 for input to next year’s budgeting process to allow for tooling up early in the New Year;

more detailed findings can follow.

It is good B2B research practice to ask questions and request advice from others (internal team and external agency), and this is even more important where the person charged with undertaking a study is not a dedicated research practitioner.


Ask the agency if it wants to know more in order to better address the business needs at hand. And ask questions about the research and any

terms or techniques you would like explained – a research buyer who is not completely up to speed on the process should not hold back from asking for explanations of the process and any next steps. Do not be macho in not admitting where you are not skilled.

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- Act as a reference point for queries and problem resolution throughout the project.
 - The ability to translate knowledge of the business and the category, including complex technical or industrial knowledge, into terms that will be understood by researchers, fieldworkers and respondents alike. This includes the provision of a glossary of terms or index that can act as reference material.
 - The ability to represent the company's position in checking that the correct terminology and reference points are used in the final reporting. Let the report speak for itself (your role is not to edit the findings) but ensure that the information is framed in such a way as to maximize internal audience understanding and improve the likelihood of action being taken. In this way, internal clients do not lose faith in the researchers through their unintentional misuse of language or terms. For example, if a research executive reporting on a study muddles "chlorate" and "chloride," or does not understand the nature of the distributor network, credibility can suffer.

Preparing B2B research briefs

B2B research briefs should include sufficient background to enable the supplier to write a proposal in response with reasonable confidence that he or she has the facts right, understands the basic parameters of the situation, and that suggested approaches address the key issues. Generally, give the agency at least two weeks to respond - preferably more if the likely work is complex and/or if it has an international component. (Obtaining quotes from local field agencies in the relevant countries takes more time than obtaining home-country quotes.) The following should be included in any RFP:

- Details of background (this may be more extensive than for other forms of research), including any prior relevant research or market knowledge.
- Why the research is needed -

overall and individual business and research objectives.

- Who the major sponsors of the research are - for example marketing, IT department, quality assurance, CRM or the board.
- How any primary or secondary research will fit in, or need to fit in, with other information or output.
- Who the respondents are likely to be, likely sample, and sample sources.
- What research output ("deliverable") is required, including additional presentations anticipated with sub-divisions or special internal clients.
- When the research results are needed by.
- If a face-to-face meeting or teleconference is wanted after the brief has been sent out.
- In what format the proposals should be delivered (as written proposals, in PowerPoint, via a presentation or any combination of these).
- Contact details for the main point of contact: postal and e-mail address, phone numbers.

What it is like being a B2B researcher?

The life of a B2B researcher is one of challenge and change. As a July 2002 article in MrWeb, a U.K. market research digest and newsletter, expressed it:

"The differences between the role of the B2B researcher and that of consumer researchers? There are lots, although there are plenty in common too. It could be summed up by saying that most of the skills are common but most experiences are different - you may have the same training and the same type of brain as a consumer researcher but you do different things with them when you are working among people who buy for business."

There are many sorts of B2B researcher working within research agencies or operating independently: executives with client contact who design research, manage projects, analyze and report on data; fieldwork interviewers; those who enter data;

coders; specialist computer programmers who manipulate data analysis software; data processors; and those who undertake special analyses such as advanced statistical analysis or modeling. Those most affected by the fact that the research is B2B as opposed to any other type are the executives and fieldwork interviewers. It is they who, in particular, need to know about the particularities of the marketplace, the characteristics of the respondent and the exigencies of the business clients commissioning the research.

Skills B2B researchers need are diplomacy, an ability to speak at senior levels, and an eternal interest in a wide variety of different business areas or areas outside the routine of our normal daily life. Also useful is the skill to absorb lots of rather detailed information like a sponge and distil it into meaningful results. Double- and triple-checking everything - with different sets of eyes - is not a bad practice to foster also.

Being able to work with clients throughout the full stages of the project is important too. For example, some clients may not be aware fully of the "real" deadlines associated with submitting a questionnaire to the field force, especially when a translation (or translations) is needed - each change requires new questionnaire versions, new translations and sometimes new briefing notes. Often, it requires patience and some flexibility to meet client needs, especially when the deadline is stretched by further rounds of requested changes. This is where initial good communication (especially about client/agency tasks and timelines) and strong project management skills can come in very handy.

Let's turn now to the different sorts of jobs in B2B research.

Research executives

Research executives who enjoy working in a business as opposed to a consumer world will relish the career of B2B researcher. It is diffi-

cult to know whether you will like it, though, unless you try it; generally, the larger agencies will allow younger researchers to have a period in both research spheres on request. Some love it; some do not. Once a researcher has had experience of the business world (whether B2B or B2C), it is common to have a different perspective on consumer projects, which can be more repetitive and more of a known quantity.

Some researchers prefer what is known and familiar to them - discussing with consumers subjects of which they know something themselves and undertaking extensive qualitative exploration of consumers' buying behavior and attitudes. By contrast, the business researcher may have less time for psychological investigation and may be working with topics that are remote from his or her own sphere



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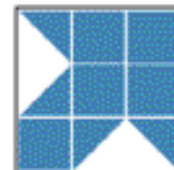
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of knowledge. It can be a bit of a challenge, but one that someone who likes variety and is not fearful to tread in unknown fields may relish.

A university qualification of some sort (in Europe, a degree in psychology) is not unusual for a B2B researcher. It is not uncommon for business researchers to have experience of some other form of research or to have direct business experience prior to joining a specialist B2B research team. Some have training following a degree in business studies, law or medicine, and can bring expert background knowledge to their research.

The B2B researcher in the course of a normal week's work usually will be involved in several projects and in many different stages of project. These may include the following (possibly on different projects):

- Questioning a client about its market and the issues arising from a recent brief; for example, what are the particular market characteristics

that need to be taken account of and what are the particular sensitivities, if any?

- Deciding on the optimum sample size given the (often) very low incidence of some respondent categories of respondent (and budget considerations).

- Obtaining quotes from an internal field force, "sister" or associated agencies (domestic and/or abroad) with known expertise in B2B interviewing.

- Asking the client for more information on the particular translation of technical terms that may not be commonly known by the translation agency.

- Checking up with agencies elsewhere about success in recruiting difficult-to-find samples - how many interviews completed, how many yet to do? Discussing options if the sample cannot be achieved in full - could some additional interviews be conducted with some other categories of respondent? Could minimum and maximum

quotas be allocated rather than just one set quota size?

- Finalizing a topic guide for a client in one rather unusual sector and sending it off to the client asking him or her to suggest any additions or changes needed.

- Arranging to conduct a personal interview with a senior executive for a study involving a small number of qualitative interviews.

- Double-checking on recruitment for a luncheon mini-group of intermediaries.

- Checking the data processing specifications on a quantitative ad hoc project.

- Drawing up the template for reporting and/or Web-based information dissemination.

- Attending an evening B2B "forum" meeting with other B2B researchers.

In the course of their career, some B2B research executives will work client-side as well as for market research agencies or consultancies. This can be helpful if they then return later to agency life in providing an insight as to how larger companies work, in increasing specialist knowledge, and in understanding how to make research more usable. Many researchers are generalists - commonly working in different sectors, although sometimes with a specialty - while others are much more specialized and only work in one area such as transportation or health care. In this case, researchers tend to stay longer in that sector.

Normally, the precursor to a B2B career is working in an agency with B2B expertise and gaining good (general) market research qualifications. Interestingly, B2B is one area where commonly a researcher will undertake both qualitative and quantitative research. This allows both the left and the right side of the brain (sensitive "quallie" and more numerate "quantie") skills to be drawn on; again, this reinforces the message that B2B research is the natural home for people who like variety and challenge.

The business executive or direc-


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tor in a research agency often has a close relationship with people (many of whom are not researchers) in the client company hierarchy. His or her contribution, drawing as he/she does on wide experience, often of other sectors, other markets but similar business issues, means that he or she may be asked to talk about research results in a very wide context, often acting as a management consultant as much as a researcher. An executive can promote research up the value chain, contributing analysis, interpretation, knowledge from research and other sources to what the research tells him or her. Intelligence-gathering, data fusion with data drawn from many sources, and interpretation are all skills that B2B researchers can, and do, bring to their clients. We repeat: intelligence gathering is now often as much the focus as primary market research. The B2B executive often brings a wider perspective to the client company and acts as a trusted advis-

er as well as a research partner.

A B2B fieldworker (telephone interviewer)

Much B2B work is done by telephone so the B2B telephone interviewer plays an important role. Typically, B2B research requires specialist interviewers who undertake nothing but business research or also some B2C research. Often they are mature and well-qualified, and have a degree or some other higher qualification that gives them confidence in speaking with business respondents.

Typically, interviewing is not their main occupation but provides some cash flow. Some are fluent in one or more additional languages, and in an international study this is essential if the subtlety of technical or complex language is not to be lost. As noted earlier, B2B interviewers must be well-trained, have an authoritative manner and voice, and be prepared to persevere in the face of some initial respondent (or gatekeeper) rejection or hesitancy.

Telephone interviewers may never meet those they interview, and must be able to be as convincing with, as interested in and as enthusiastic to hear the responses of their twentieth client as of their first. They must know when and how to probe, and be able to ask questions and record answers (some of which will be verbatim) at the same time. Maintaining the impetus and pace of the interview is important to maintain respondent interest. They must be "a cut above" in every way and should be rewarded accordingly.

Finally, on occasion a telephone business interviewer must be prepared to put in long and unsociable hours: for example, interviewing in a different time zone from a central location or contacting tradespeople outside normal hours. Interviews must be conducted when our respondents are available.

A typical day may include:

- A morning briefing with a client where a series of Internet sites are displayed and the market background



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is discussed, for instance tourism in the hotel sector.

- At the briefing, a discussion follows where the client and agency personnel involved are there to answer questions and walk through the questionnaire.

- Spend half an hour absorbing the questionnaire and picking out what may be the issues arising. Familiarize oneself with the glossary of terms.

- Do first interviews - set up several for the following day and for the following week but manage to do one with a respondent who happens to be there and wants to do the interview immediately.

- Fill in contact forms and report back to supervisor. Discuss one problem that is arising on the recruitment eligibility (for instance, are motels allowed in the sample or not?). Check with what supervisor and/or researcher and/or client said about SIC codes and eligibility.

- Leave to go home and dress up for night, doing some extra work in a totally different field (such as acting in a community play)!

Telephone interviewers can make or break a B2B telephone survey. A professional manner and approach can make a huge difference. If studies come back with lots of questions unanswered or many “don’t knows,” one must always look at the quality of the questionnaire and of the sample in the first place, but in the second, at the quality and briefing of the interviewers. Often, lots of unanswered questions (or uncoded responses that turn out to have been on the pre-code list after all) suggest that interviewing quality has not been as high as it should be. Go for the specialist interviewers whenever possible; skimping on quality in B2B fieldwork is never a good option.

B2B recruiters

B2B recruiters who set up face-to-face qualitative interviews, telephone interviews - or, on occasion, mini focus groups or full group discussions - are often a very special sort of person who share many of the characteristics of the previous categories of business researchers. Good busi-

ness recruiters are few and far between, and when you find some, look after them. These people can recruit to the most demanding specifications; but this is not easy, and it takes time and skill. They need to be exceptionally persuasive, to know when to put pressure on and when to back off, and tend to have a good voice, patience and a convincing manner. Very often, the best recruiters have experience in some other field before falling into their jobs in recruiting (again, sometimes not their main career) - a happy accident.

Other roles

Other people engaged in B2B research include those who specialize in desk research, transcribers of tapes from focus groups and in-depth interviews, data entry staff, those who code up questionnaires, and those in data processing and analysis. Common to these roles is a need for a meticulous attention to detail and ability to translate the complex into the simple. The business researcher is often at the cutting edge in terms of business developments worldwide: a privileged position.

Respect and enjoy

Business researchers are rarely there by initial volition; many find their way to business research as they are attracted by its diversity and eclecticism. There tends to be somewhat more emphasis on ad hoc research and somewhat less on tracking research. The audiences to whom business researchers are speaking are often people with intimate knowledge of complex and sometimes arcane areas. We must sometimes encourage others who do not have a tradition of research to take risks and to have the courage of their convictions based on what we know is solid and good research. Business researchers are often aware of trends, of new business thinking, and of leaps forward in new product and design development well ahead of others. We are in a situation of both privilege and responsibility. Let's respect and enjoy it. | Q

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Overcoming the hurdles

Recruiting in the B2B world is a little like running the gauntlet. Interviewers must sail over hurdles, parry with gatekeepers and land interview times with grace. Project managers must keep a keen eye on the budget and guard the precious sample list with care. Researchers watch with bated breath and discuss strategies for addressing their research objectives without wearying the respondent. With contributions from Western Wats, On-Line Communications and Itracks' CATI center, this article highlights best practices for securing business interviews that will ensure you emerge unscathed from the obstacle course.

• Hurdle 1: gatekeepers

Ideally, your interviewers know the contact name and have their direct line. However, usually the first person to answer your call is the one responsible for accurately directing the caller and screening out irrelevant calls for their boss. "The main obstacles are getting a round the gatekeeper and actually getting to the respondent. A good gatekeeper is taught to screen out calls like ours," says Lisa Joseph, vice president, client services at On-Line Communications, a Bartlesville, Okla., call center operation.

Rather than treating them as an obstacle to hurdle over, Ray Whitton, CATI project supervisor at our firm Itracks recommends enlisting their help. "Be honest, state your reason for the call, and don't be afraid to ask for the gatekeeper's help in reaching the correct respondent, which will save you time and energy," he says.

The people at Western Wats, a Provo, Utah, call center, agree. If you can't maneuver quickly a round the gatekeeper, treat them as an ally. "We try to keep our contact with the gatekeeper as

brief as we can, unless we need to enlist their assistance in finding the correct respondent within their company. In that case, we will explain as much as we can about the qualifications we are looking for and ask for their help to direct us to the correct individual," says Gordon Bishop, director of client services for Western Wats.

• Hurdle 2: Voice mail

The experts are split on the role of voice mail messages in B2B



By Jolene Vanthuyne

Recruiting and data collection in B2B research

Editor's note: Jolene Vanthuyne is vice president, marketing at Itracks, a Saskatoon, Saskatchewan research firm. She can be reached at jvanthuyne@itracks.com.

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The Fine Art of Marketing Research

research. Do you leave a message and risk preparing the respondent to avoid your call in the future? Or do you leave a message and indicate that you'll look forward to talking to them when you call back? "Leaving messages has both positive and negative implications," says Itracks' Whitton. "On the upside, you can begin the rapport-building process right away. On the downside, there just isn't enough time to explain the purpose for the call. I stay away from leaving messages, primarily because I prefer a live audience. That way I can address concerns or hesitations right off the bat."

Joseph agrees that leaving messages is a judgment call. "Sometimes we leave a message, sometimes we don't. It depends on how hard it is to reach the respondent and how much sample we have. If you have limited sample then you really need to leave a message with your toll-free number and tell them what the call is about."

However, Bishop is adamant that in the B2B space, the rules change and not leaving a message indicates a lack of professionalism. "In our opinion, not leaving a message is an unprofessional thing to do within a professional environment. No one

likes to think someone keeps trying to blind side them by calling but not leaving a message."

Bishop actually feels that voice mail represents an opportunity for Western Wats to get closer to the respondent. "We've found that answering machines and voice mail can actually be quite helpful in reaching the correct respondent. They often will provide a contact name, and direct number to reach the respondent on subsequent calls. We ask our interviewers to listen for this information," he says.

• Hurdle 3: Timing

You've managed to identify the right person, get past the gatekeeper and leave a voice mail. Now you need to talk to them directly and ask for 10 or 20 minutes of their time, or longer. Their own staff members sometimes don't get this much time from them and you're asking them to set aside the demands of the day for you.

First, you have to find a time to talk to them long enough to book an appointment, or, if everything works in your favor, conduct the interview. Whitton recommends calling at off-peak times. "Most are decision makers committed to getting things done, which means you

will find them in the office long before anyone else and long after everyone has left. These stolen moments are used to tidy up unfinished business away from the challenges they may face during their regular busy day. This is an excellent opportunity to call them."

Western Wats relies heavily on callback appointments to make it as convenient for the respondent as possible. As Bishop says, "Try to get as specific a callback appointment as you can. Set a date and time, rather than a general callback, say, for tomorrow afternoon."

Extra motivation: incentives

Incentives are part of the package that will entice a respondent to complete a survey. You just need to find the right incentive for the right demographic. "The incentive really depends on the profession, level of professional responsibility, and the level of difficulty securing their cooperation because of the respondent's work environment. We would recommend an incentive commensurate with the professional's business environment. For example, when we ask for time from a lawyer, practicing physician or accountant, we are taking time they would otherwise bill for. For others who work in a more free-flowing business environment it is a factor of their level of responsibility," says Bishop.

While personal cash rewards are "hands down what works best," says Joseph, there are other options such as charitable donations and a summary of the survey findings. Whitton recommends giving the respondent options between a personal cash reward and a charitable donation. "Give respondents the choice to keep or donate the funds. Offering an incentive anything short of their hourly salary could show we don't value their time. However, depending on the individual, a charitable donation made in their name may be a classier option," he says.

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“Some populations value knowledge more than money and are more interested in an executive summary of the results. We have found this to be the case with educators, for example,” adds Bishop.

The catapult to success: the interviewer

The interviewer must be confident, well-spoken and polite without being arrogant or overly solicitous. They have to inspire a mutual respect and rapport while being respectful of the executive's position. They must be persistent, adaptable and patient because they will get more rejection than agreement and will be faced, at least occasionally, with the rude or waffling respondent. “The interviewers that are most successful are those who are most adept at securing specific callback times, staying persistent - we often have to call multiple times - and can quickly and confidently explain the purpose and

importance of their call to gain respondent cooperation on the initial call or a subsequent call,” says Bishop.

Whitton recommends looking for three particular characteristics in an interviewer: patience, professionalism and adaptability. “Not everyone is able to maintain a professional presentation. Researchers should be looking to work with interviewers who exhibit the attributes necessary to complete the strenuous task of tracking down busy executives,” he says.

Adds Bishop, “Unlike consumer interviewing, professional interviewing requires the interviewer to work comfortably in an unscripted environment when securing the respondent's cooperation.” It tracks typically selects people for B2B interviewer training who have excelled at consumer interviews and exhibit the following qualities:

- **Patience:** Will they be able to look for the needle in a haystack

without becoming frustrated or complacent?

- **Professionalism:** How do they sound? Would you be willing to listen if they phoned you? Crucial components such as tone, enthusiasm and speed will play a huge factor in obtaining a professional rapport.

- **Adaptability:** Are your interviewers willing to try something different if at first they don't succeed?

Careful negotiation

Getting the time and attention of busy executives involves a careful negotiation of the hurdles. The key is the interviewer, who persistently tracks down the right person and, when they've reached that person, politely persuades them, using incentives, scheduled appointments and professionalism to take time out of their busy lives for research that ultimately will benefit the end client. | Q



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Unlocking the ties that bind

In today's dynamic competitive environment, more and more brand managers are moving their positioning strategy away from traditional value propositions (quality, value, etc.) in favor of more emotionally-charged value propositions. Mega-brands such as McDonalds, Cheerios, Pillsbury and Pepsi are seeking ways to touch consumers' emotions as well as communicate traditional cost-benefit selling propositions.

We have helped many clients use qualitative research to better understand the emotional ties that consumers have with their brands. In our research, we have found that consumers' motivations for purchase often go beyond the rational and spoken dimensions of decision-making. Consumers often are driven to purchase products based on product benefits or attributes that reinforce a specific emotional connection. We define emotional connections as consumer-identified emotions and values that connect the consumer with a product or brand. These connections represent the personally relevant role the product/brand plays in the life of a consumer.

While qualitative methodologies are certainly valid, it would be very helpful for a brand manager if the impact of these emotional connections could be quantified. However, quantifying such dimensions has proven to be a challenge.

In a typical quantitative survey, respondents usually would be asked to reflect their opinions on an X-point scale. However, as argued in Gerald Zaltman's thought-provoking book *How Customers Think*, up to 95 per-

cent of consumer thinking happens in our subconscious. This begs the question: If commercial marketing research relies solely on logical reasoning and rational thought processes to gauge consumer behavior, to what extent are researchers misreading a powerful component of consumer behavior - one's emotional connection to a brand?

This argument is probably especially true for product categories and brands for which consumers express a high degree of emotional intensity. In cases such as these, a traditional quantitative survey, which requires respondents to read the survey questions and provide answers consciously, would not be the best tool to quantify emotional connections and brand associations. To truly assess consumers' emotional connections to a brand, we need to devise a way to collect respondents' opinions while holding conscious thinking to a minimum.

For several years, our firm has used a technique for understanding -

Assessing the impact of emotional connections to brands



By Paul Curran,
Bill Thomas
and Camille Nicita

Editor's note: Paul Curran is former senior project director, and Bill Thomas and Camille Nicita are principals, at Gongos and Associates, Inc., a Bloomfield Hills, Mich., research firm. Thomas and Nicita can be reached at bthomas@gongos.com or at cnicita@gongos.com.

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qualitatively – consumers’ emotional connections to brands and product categories. In this approach, we explore and identify relevant emotional connections and interrelationships within a category and for specific brands.

The qualitative approach is generally conducted through a series of one-on-one, in-depth interviews with consumers. Prior to coming to the interview, respondents are asked to

construct a collage of images, pictures and/or words that symbolize their feelings toward an ideal brand/product relationship. Paired with a skilled interviewer, the symbols become a catalyst for the expression of emotionally-driven behaviors. The collage also identifies interrelationships among the images to tell a story of the consumer’s relationship and motivations relative to the brand and/or product category.

Using the research tool described above, clients are able to help define the brand by validating current beliefs and creating a future positioning strategy or a product development road map. This research also allows us to understand both the corporate and customer perspectives, which can identify realignment opportunities.

Ultimately, the emotional connections are integrated into all marketing activities. The key to understanding consumers’ emotional connections to brands is to make a link between a product/service/brand and the consumer’s life. Understanding emotional connections can likely make the difference between a product that looks good on the drawing board but fails on the store shelf. In the end, client organizations are better able to develop products and services that win the heart and mind (and pocketbook) of the consumer.

Still, even with the insights these qualitative sessions provide, it is difficult for brand managers to move forward with marketing outlays without the support of some type of quantitative measures. Quantitatively, corporate-level decision makers often seek to:

- assess the impact of emotional connections on traditional marketing research metrics (purchase likelihood, customer satisfaction, brand loyalty, etc.);
- prioritize the relative importance of various emotional connections;
- determine which emotional connections are associated with which brands (which emotional connections does their brand own and which are owned by the competition?);
- pinpoint an important yet unclaimed emotional connection –

identify any “white space” in the market that our client’s brand can grab.

Knowing clients’ desire for this type of quantitative support, a team of researchers at our firm set out to develop a technique that would provide the desired output but stay true to the conceptual framework of Zaltman’s work and, by association, our established qualitative approach. With that said, we knew that any technique we were to develop would have to follow the following guidelines:

- use a measurement tool that provides high discrimination but minimal conscious effort on the part of the respondent;
- use visual stimuli to reflect emotional values, replicating the qualitative process whereby respondents use images and words to represent emotional values;
- hinder overly-conscious thinking to ensure respondents react to stimuli in an emotionally-charged manner.

The major goal of our quantitative approach is to allow respondents to reflect their responses with minimal conscious effort. In other words, we want them to let us know what they feel – which should only involve minimal conscious thinking. To accomplish this, we rely on three specific techniques:

- use extremely simple paired-comparison choice tasks to minimize the amount of cognitive effort needed to respond;
- use pictures collected from qualitative research as stimuli to reflect the emotional connections (by eliminating as much verbiage as possible, the conscious thinking should then be minimized);
- use elements of a psychological concept known as negative priming to inhibit conscious thinking.

A case history

In 2001, automaker Saturn wanted to better understand how its customers connect with its brand and product offerings. The research used our qualitative emotional connections technique described previously. A series of IDIs were completed with Saturn owners as well as owners of compet-

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ing makes. From this research, we were able to identify the following emotional connections relevant to the Saturn brand as well as the product category:

- success/accomplished;
- independent/self-reliant;
- comfortable/relaxed/happy;
- peace of mind;
- smart/practical;
- care for others/family;
- fun to own;
- Saturn family/community.

Given the amount of qualitative research we had already completed, we felt Saturn would be an ideal client for which we could develop our quantitative survey instrument. Armed with the results of our qualitative research and the guidelines we had established, we set out to design a quantitative survey instrument that would meet our research objectives.

A key component to the approach involved the selection of the competitive set. In this case, we selected three competitive, yet distinctive, vehicle brands: Honda, Volkswagen and, of course, Saturn. Selection of the competitive set is critical since an underlying assumption is that each brand has a certain level of emotional intensity.

After some initial screening questions, our instrument begins by presenting respondents a series of vignettes. These vignettes were, more or less, actually built by the IDI participants during the qualitative phase. Each vignette included a photograph along with a story as written/described by the IDI participant. For each emotional value, the respondent identifies the vignette to which they most strongly relate. One respondent-identified vignette is used to represent each emotional value being tested. The images associated with the vignettes become proxies for the specified emotional connection later in the survey. Once the respondent-specific stimuli are established, the respondent is taken through the negative priming exercise and then onto the two choice exercises.

Perhaps the most provocative component of our approach is where we

use specific elements of negative priming. Priming is a facilitated cognitive process that produces a faster reaction time or higher recall rate, due to the cues provided by the primer. Suppose, for example, you are asked to pick out breakfast items from the following list of words: butter, bread, paper, orange juice, phone, and computer. To prime you, before entering the lab you are kept in a waiting room that is infused with the scent of

freshly-baked pastries. While you are waiting your mind is focusing on all these bakery items, such as bread and butter. In theory, your reaction time to the experimental task would be much faster than that of a respondent kept waiting in a scent-free environment. The discrepancy between the unprimed and the primed respondent would be referred to as a priming effect.

Negative priming refers to the



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interference of irrelevant stimuli on the processing of the relevant stimuli. While some argue that the interference slows the processing of relevant stimuli, this is actually what we seek to accomplish. That is to say, we show irrelevant pictures to interfere with respondents' ability to cognitively process the relevant pictures (those the respondent associates with the emotional connections).

In our specific application of negative priming, respondents were challenged to remember various innocuous details from a set of 12 pictures. Respondents were told there would be a quiz at the end of the survey in which they would be asked to recall as many of the details as possible. In theory, respondents would be distracted by the irrelevant pictures, which should effectively suppress them from thinking too much about the stimuli presented in the choice tasks.

Key to our research is the use of paired comparisons in the choice tasks. Paired-comparison questions have been shown to better allow respondents to make distinctions between many similar items.

Our approach uses two sets of paired-comparison questions. The first set explores the "importance" dimension. Here we present respondents with a choice of two emotional connections and ask: How do you want to feel about a vehicle? After completing the first choice exercise, respondents are re-primed.

To measure the second dimension - brand association - each respondent is randomly assigned a brand from the

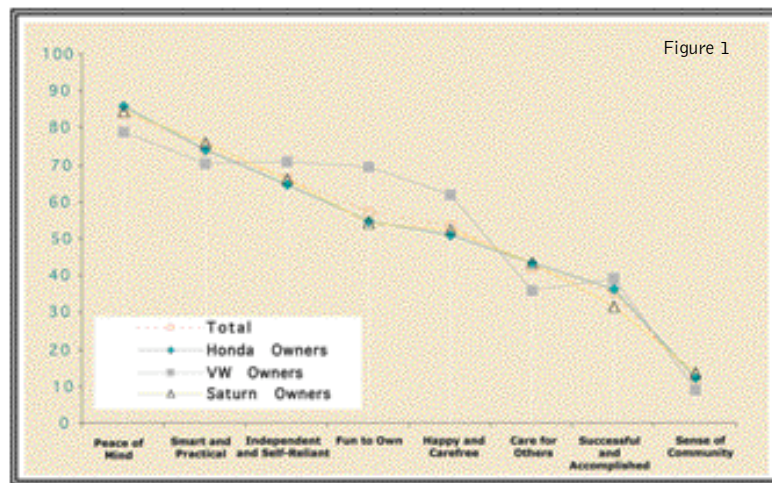


Figure 1

competitive set. Respondents are then asked: Which image do you associate more with Brand X (Saturn, Honda or Volkswagen)?

Our test

As noted previously, our primary objective was to develop a quantitative survey instrument to assess the impact of emotional connections previously uncovered in a series of qualitative interviews. It is important to note that the process we lay out should be considered a follow-up to thorough qualitative research and not a stand-alone approach.

The survey was administered over the Internet and sample was drawn from an online consumer panel. A total of 1,662 Honda, Saturn and Volkswagen owners participated in this study. Respondents were screened in such a way as to match the demographic composition of the qualitative phase.

From each set of paired comparisons we are able to derive performance scores for each of the two dimensions studied: importance of the emotional value and brand association with the emotional value.

From the importance scores, we are able to assess the relevance of eight emotional connections for automobiles among our client's target market. The emotional connection "peace of mind" is shown to have the most impact while "sense of community" has the least (Figure 1). These findings confirm what was hypothesized in the qualitative phase.

Using the brand association scores, we are then able to build a market map to help pinpoint which brand "owns" which emotional connection. While Volkswagen owns "fun to own," Honda owns "peace of mind." In addition, the results also reveal the unoccupied market niche, should a brand wish to reposition to gain better customer appeal and/or avoid competition. For example, an opportunity may exist with "independent/self-reliant." We are also able to incorporate the importance dimension into the map by varying the size of the elements (where the size of the bubble reflects the importance of the emotional connection). It should not be surprising to see Honda, the market leader, strongly associated with "peace of mind," the most important emotional connection (Figure 2).

Our final analysis uses a metric we call emotional congruence, which

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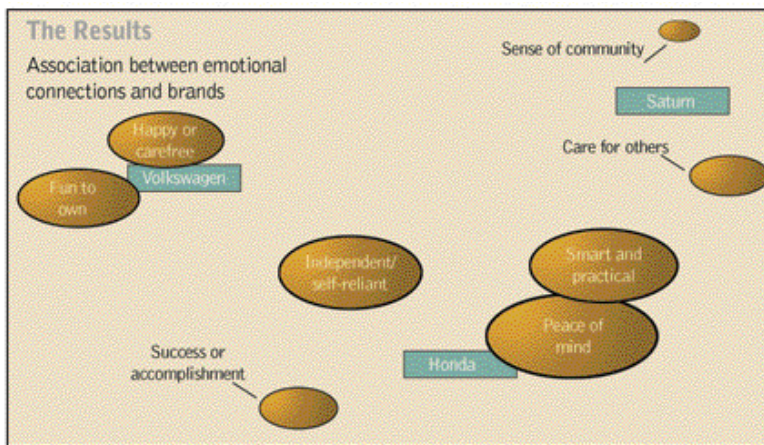


Figure 2: The perceptual map shows which brands are associated with which emotional connections. The size of the bubble reflects the relative importance of the value.

refers to the extent to which the brand satisfies one's emotional needs. Emotional congruence is a derived measure based on the gap between a desired emotional connection (importance score) and the perceived emotional associations with the brand (brand association score). A match between the respondents' preferred

emotional connection and the perceived brand-specific emotional connection would result in a high emotional congruence score.

By correlating emotional congruence to purchase consideration of a brand, we can measure the impact to which emotional connections drive brand consideration. In our case, we

observed significant correlations between emotional congruence and purchase consideration, suggesting that emotional connections do, in fact, drive purchase consideration.

Overall, we were quite thrilled that each of the analyses provided our client a sound quantitative measure upon which they could build their brand strategy.

Informed decisions

Through our work, we have demonstrated a quantitative approach that allows one to better gauge the relevance of various emotional connections for a product category. Further, by adapting this approach as a follow-up to a robust qualitative study, we show how the impact of emotional connections on purchase consideration can be established using sound quantitative methods. This will allow marketers to make confident, informed decisions regarding brand essence, positioning/re-positioning, new product development and advertising, etc. | Q

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A supplier or a partner?

As a buyer of market research services - big and small - I welcome a variety of market research firms to pitch me on their services. I'm often surprised at how little effort even the biggest firms put into selling and keeping clients. Some of the mistakes suppliers make:

1. Not making the effort to differentiate your company

Want to get in the door to see me? So do hundreds of your competitors. Cold-calls are likely to be returned when supplier salespeople give a taste of their company's unique offering as it applies to my business generally. Think speed in delivering results is your advantage? Say so. Do you have an insightful way of doing analysis? Say so. Do you have senior staff writing excellent reports for the C-suite? Show me. Don't announce that you are a full-service market research firm and then stare at me expectantly, waiting for me to hand you my budget. That won't happen.

2. Not customizing your pitch to my industry or business

Yes, I know you are billing your hours and can't pre-research everything there is to know about my company despite your interest in selling your services. No one is asking you to memorize our annual report. We don't - why should you? But please know the basics. If a client is in health care, what part? Services, pharmaceutical, devices, etc.? Your approach should show some knowledge of what is important to the specific industry and client. Think: What types of market research needs would a big established pharmaceutical firm with a good pipeline have vs. a one-product medical device startup?

3. Talking about your products instead of addressing my needs

Despite the hours of sales training that some suppliers receive, this still happens with great regularity. Sure

you've got your higher-profit, canned research tools you'd like to sell me, but you should be prepared to show me their relevancy to my precise need or business before you inundate me with their catchy trademarked names and colorful brochures. Yes, I'd like an introduc-

To become the latter, research firms must avoid these 10 sales mistakes



By Rosie Balk

Editor's note: Rosie Balk is director, marketing research and strategy, at Advocate Health Care, a Chicago area hospital group. She can be reached at 630-990-5552 or at rosiebalk@yahoo.com.



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tion to your firm before you go nosing around in my plans for the year but remember: If you are doing all of the talking you probably aren't gaining enough information to make a sale.

4. Quickly categorizing the complex business issue my company has as a standard type of research

This undermines the credibility you've hopefully established in the initial pitch. "What you've got is a satisfaction problem; we have just the thing for that" you say. That is fantastic if your assessment included the proper questions to determine what the researchable problem is. But don't be so eager to answer the client need that you jump the gun. If you take a bit of time to ask me the proper questions, I'm more confident that you are the person who can design an appropriate project and that you will be able to ask my target audience good questions in an IDI or on a questionnaire. My

perception of your ability to conduct research is enhanced when you listen and you are less likely to have client conflict on the path you choose.

5. Not demonstrating why I should trust you with my reputation

As a client-side research broker and manager, that is what is at stake when I trust you with an assignment. You are my designated project expert, but the responsibility remains with me. Convincing internal clients to spend dollars on market research vs. operations or marketing isn't always easy. We "end users" have a lot at risk, so supply me with what I need to know. References from clients who are like me, either in my industry or who have done a similar project are good. So are blinded writing samples so I can see if you can make a recommendation or if you leave your analysis at "Column A says 10 percent." If you are presenting data,

can you handle conflict? What type of in-house experts support your work? Are they smart and experienced?

6. Not figuring out the peculiarities of the person in front of you

Is the person you are pitching to a hands-on editor or a just-give-me-the-report type? Will they review every single crosstab or none? You are likely to have both as clients so save headaches all the way around and figure this out up front. Include the cost and timing of major edits, changes, etc., as a line item in your proposals so you don't get blindsided by a hands-on client.

7. Over-working the organization

Want to permanently burn a bridge? Then by all means, go around the in-house market research or marketing staff who brought you in, to a contact, say a couple of levels up. Don't ask mar-

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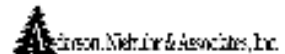
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keting if it is okay or tell them what you are doing; let them hear about it through the grapevine.

Misrepresent your relationship to the organization, then sell the big guy something pricey he doesn't really need, which he will probably bill marketing for. When people in the company talk about how stupid the project is, let marketing deal with the fallout. After all, it isn't as if marketers talk to marketers at other companies who also need research...or do they? Of course we expect you to work your relationship. Just do it the right way.

8. Resting on your laurels

There are many suppliers who take their clients for granted. Are you sitting on three years of my data, waiting for me to call you to give you a year-four contract that you've made no effort to acquire? Providing three years of good data is indeed an effort, but it may not be enough for you to keep a contract. Year four or year two wouldn't be at risk if the supplier would think, on occasion, about what patterns they've seen over the years and what they'd recommend I need to investigate next. A good up-sell works in my interest and in yours. Stay on top of your clients, occasionally spending some unbilled time actually reviewing projects we've done, looking for patterns in our needs, thinking of some aspects maybe we couldn't afford to do the first time around but still might need in a different project. Clients would welcome an informed call such as, "Remember when we did that ad testing for you and uncovered that problem communicating to your target? We're you able to resolve that? We have a new, even more refined way of looking at this now that might be helpful for your next ad test. Call me back if you are interested."

9. Thinking of in-house research management staff as something less than a researcher

Calling us "end users" is a good example of that. We are likely to have the same education as you, we may have worked your side of the fence and we can provide you with what you need to know to do the best job for a specific client. A good research relationship is largely collaborative with great ideas, designs and reporting hammered out in a partnership.

10. Never following up

To many of you, a project ends when you e-mail a report. Unless there are competitive issues, on a major study a good supplier wants to know what happened next. How was the information received? Was it used as intended? Could anything have been improved? Are there any next steps the supplier can help with? This behavior is what elevates a supplier to a trusted partner. | Q



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Finding a clear path to new ideas

In today's environment, product development professionals are expected to manage their current pipeline of products while also formulating a product plan for the next five to 10 years. How do product development professionals find the time, energy and will to seek out this new learning? Many tools have been developed that aid in looking at consistent information with new perspectives. One tool is the Delphi interview, which is a 60-minute conversation with a trend or industry expert.

The term Delphi has its roots in Greek history. The city of Delphi was a hub of activity, combining culture, religion and perspective into one highly populated area of information. Delphi was also home to the Oracle of Pythia, a woman believed to offer great insight into the future. The Oracle was a great influence to visitors, who believed this knowledge of the future would help them succeed in life.

What oracles exist today? Delphi interviewees may be high-level executives, laymen from the field or theologians. They are non-competing professionals whose areas of expertise have been identified as having an impact on the project objective. When choosing interviewees, look for individuals who have knowledge of peripheral areas that impact your product. For example, a manufacturer of healthy beverages might speak with a cafeteria worker who spends

a great deal of time observing eating habits during lunchtime, a professional chef who enjoys creating fun flavor combinations, or a perfumer who could offer insight as to how smell affects consumers. When searching for interviewees, keep your mind open. Remember, you are looking for new perspectives to provide new information.

The following suggestions may help stretch your thinking in determining potential Delphi candidates:

- People not like us.

Interview a person who is not a core target for your company. For instance, a warehouse worker who manages delivery systems may be a good choice for gaining new insights on materials management in a hospital. The correlation here is the focus on getting goods from point A to point B. The warehouse manager has many

Use Delphi interviews to guide product development



By Daila Boufford

Editor's note: Daila Boufford, formerly with Innovation Focus, a Lancaster, Pa., research firm, is senior project manager at Psyma International, a King of Prussia, Pa., research firm. She can be reached at daila.boufford@psyma-usa.com.

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of the same needs as the materials manager but each goes about solving them in a different way.

- A good mix of academia and “in-the-field” professionals.

Professionals from each of these categories have a great knowledge base. Those from academia are on the cutting edge of learning, surrounded by constant new knowledge. These folks are highly innovative, enjoy seeing technologies applied in new ways, and also have the advantage of looking at the world of product development from the outside. In-the-field professionals offer a sense of street smarts, being able to capitalize on their years in the industry, recognizing trends and learning how to move on them to stay ahead of the competition.

- Enablers of business.

What affects your marketplace? How does the economy play a role? Do natural disasters affect your business? Good or bad? What about the growth and development of the Third World? List enablers and then start to identify persons or organizations that specialize in these areas. There are many non-profits who focus on disaster relief, Third-World issues and other areas

that may impact business. Many professionals in these organizations have a strong passion behind their work efforts and have given a lot of thought to finding creative solutions.

Dive deeper

Delphi interviews can reap high rewards for all involved. At first glance, a Delphi can offer information on a field of business. When you dive deeper and debrief the interview, you will start to see how the interviewee’s field of business could cross into another field. When found, these crossovers offer a glimpse of the future and can be the jumping-off point for a multitude of ideas or new thought patterns. Frans Johansson talks about these intersections in his book *The Medici Effect*: “The key difference between a field and an intersection of fields is in how concepts within them are combined. If you operate within a field, you primarily are able to combine concepts within that particular field, generating ideas that evolve along a particular direction – what I call directional ideas. When you step into the intersection, you can combine concepts between multiple fields, gen-

erating ideas that leap in new directions – what I call intersectional ideas.” Johansson’s book focuses on finding these intersections and learning how to capitalize on the abundance of ideas they create. Delphi interviews are one of many tools that can cultivate these intersections.

Think big

Now that you know the type of people you are looking for, how do you find them? Get together with your colleagues and begin to brainstorm a potential list of interviewees. Books, articles and the Internet are great searching tools to track down professionals who are leading-edge thinkers about a particular topic. Take a chance and think big, but be flexible and open to other less-known suggestions. If you get turned down by a potential interviewee, don’t be afraid to ask for referrals and suggestions. If you are having trouble coming up with experts in a particular field here are some tips to help you in your search:

- Alumni organizations are a great resource to track down professionals who have been doing research on a particular topic. Schools like to keep track of their success stories so you should have no trouble getting pointed in the right direction.

- Magazine editors are generally not allowed to take part in an interview, due to industry regulations, but they are able to offer their advice on who they consider to be leading-edge thinkers in their field.

- The World Future Society publishes a directory of its members who range in expertise from agriculture to multinational trade to quality of life. As the name indicates, these members are excellent thought leaders who thrive on identifying emerging trends.

- Professional associations or organizations who promote knowledge gathering and sharing within

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a particular discipline offer up a multitude of members whose passion may be the perfect fit for what you are looking for.

At the onset, getting a list of as many potential interviewee names as possible is key. You will be able to whittle down that list in no time once you gain a better understanding of who is interested, who has time and what kind of incentive will be required. The amount of honoraria or incentive varies, and interviewees should be compensated for their time. The general rule of thumb is that an established, published expert on a certain topic is going to cost a lot more than one who is not published, so budget accordingly. As you make your final decisions on who to interview, keep in mind that the success of the interview rests not on the interviewee but the interviewer. It is their job to make connections, explore and guide the interview in the direc-

tion they wish to pursue. Start with a general approach and then drill down on specific areas of interest once the interviewee's expertise has been identified.

Apply that knowledge

So, you have gone out into the world, interviewed thought leaders, professors, experienced professionals and directors in the areas that enable your business. You have a great stack of notes and can't wait to get started...doing what exactly? This is a critical point in the project. Many times it's tempting to get so excited about what was learned that you forget to apply that knowledge.

A key next step is to review the notes, meet with colleagues and discuss what was learned. In order to apply insights, ask yourself this: What are the different angles or perceptions on the knowledge gained and what does it mean to my current project/company?

Once you have identified key needs, trends and emerging technologies, focus on deciding which problems are yours to solve. What do you have ownership of and why? Have a clear action plan and concrete next steps for your team to follow. Do you need to go deeper and find out more about the area you seek to tackle? Keep the ball rolling. Remember what Anthony D'Angelo said: "In your thirst for knowledge, be sure not to drown in all the information."

The quest to uncover new learning should not end here. This is one of several tools used to find new ways of thinking. You have a great leaping-off point to provide the momentum to dive deeper into your research. As you progress, remember to keep an open mind and allow each new perspective to act as a prism, generating a rainbow of opportunities. | Q

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Survey Monitor

continued from page 10

tion between everyday life stress and consumers' increased need for instant gratification in the consumption of less healthy or diet-busting comfort foods.

The survey explored the health and wellness perceptions, needs, values and beliefs of 1,031 census-representative American adults and uncovered insight supporting the contention that current medical guidelines and health food choices that don't fit American lifestyle realities - and are premised on the complete avoidance of comfort foods - are not realistic and have little hope of success.

The study, "Evolving Consumer Choice and Well-being: Fat, Carbs and Sugar Still Rule," also contends that brand manufacturers and health experts must retire the philosophies of the old paradigm that required consumers to change entrenched behaviors to fit product agendas - and accept a new healthy-living paradigm that introduces breakthrough thinking and product innovations more congruent with varied American health mindframes, lifestyles and circumstances. By not expecting healthy products to draw most consumers unless they also deliver comfort, or are part of a broader wellness approach that also encourages comfort foods, brand manufacturers may close their product growth gap - thereby flourishing in today's burgeoning health market while making a more sustainable contribution to the overall health of

America.

Landis uncovered seven different consumer health mindframes - health belief and value systems that guide choices and actions. Although each mindframe group is different, stress and the ability to cope with it are inextricably tied to success or failure. The study also uncovered mindframe correlations derived from age, gender, ethnicity and household composition.

Landis discovered that almost all Americans know what they need to do in order to be healthier - they just fail to follow through. The study revealed consumers found it hard to eat the recommended daily servings of fruits and vegetables, and that it was a struggle to eat sensibly when stressed.

With 46 percent of consumers rarely or never giving up taste for health benefits, today's consumer has a now-vs.-tomorrow core mindset. One of the key findings is the relationship of stress to the failure to achieve personal health and wellness goals, and a resulting sense of frustration. It appears that health and wellness are primarily aesthetics-motivated and life stress-disrupted.

Consumers choose quick gratification (such as release in comfort food consumption) - and perceived gains like attractiveness and energy - over more longevity-based health benefits. When specific health stresses were a factor - such as migraines, back pain, allergies and other non-weight-related health issues - the findings revealed consumers' need for instant

gratification and stress release displaces the desire for the future benefits of healthy living.

Landis' analysis suggests a person's health values and beliefs evolve over time. Younger American adults are far less likely to be focused on health and well-being, falling into the mindframe of groups unwilling to expend strong, consistent efforts towards their health and wellness. As people age, things change. The biggest shifts occur when people have some kind of health shock. The constant across all age groups is that the vast majority of adults fall into lower-commitment health mindframes, maintaining only minimal effort to optimize their health and well-being regardless of their age or life stage.

The survey findings suggest that while women have the desire to succeed with their health goals in greater numbers and either succeed or struggle with the guilt of not succeeding, men appear more able to take a care free approach. Ethnic variations in health and well-being mindframes exist as well. Caucasians are far more likely to be constantly stressed to achieve the health and well-being they desire but seem unable to attain. Non-Caucasians, driven by the need to stand out and feel attractive, are serious about their health and take some positive action but also engage in less-healthy indulgences and are more likely to do very little to live healthy.

Adult consumption of almost every junk food is higher in households where teens are present. The survey



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found that the incidence of regularly occurring stress is about the same in non-teen households as it is in teen-dominated households. The availability of junk food in teen-dominated homes impacts the consumption factor and the prevalence of less healthy mindframes more than stress.

The Landis study portends four key shifts brand manufacturers and health experts need to make. The first is mindframe congruency: Americans do not share one common health and wellness belief and value system, therefore one-size-fits-all solutions are doomed to fail. Lifestyle congruency: Strategies and products must better fit the challenges and realities of American lifestyles and health mindframes to increase the odds of consumer success. Goal congruency: Health goals must redefine success by narrowing the gap between consumers' sense of actual and ideal self. This shift will reduce the hopelessness that health aspirations are unattainable, which drives down self-esteem and is linked to destructive behavior, such as overeating. (It is no surprise the survey uncovered that 43 percent of consumers in the struggler mindframe experience depression). Product congruency: Innovate new products and health regimens that recognize the inextricable link

between stress, comfort food and failure. Healthful foods that provide comfort or health regimens that incorporate comfort foods are more realistically sustainable than strategies that seek to eliminate stress or expect consumers to radically alter their lifestyles. The results of the study are summarized in a case article available at www.landis-si.com and clicking on "Landis Knowledge Resources."

Marketing execs working with bigger budgets in 2006

A survey of 366 senior marketing executives, conducted during the last week of November and the first week of December 2005, found that 60.7 percent will be working with bigger budgets in 2006, according to an article by Kate Maddox of BtoBOnline. As reported by the Center for Media Research, the BtoB survey "2006 Marketing Priorities and Plans" found that 31.6 percent said their budgets would be flat. And only 7.7 percent said their budgets would decrease. The optimism is 11 points over last year.

In 2006, 72 percent of marketers plan to increase online budgets. Within Internet spending, the specific media that will receive the greatest share of marketers' online

budgets in 2006 will be: Web sites (30.3 percent), e-mail (22 percent), search (20.3 percent) and sponsorships (10.3 percent).

For offline media, 52 percent of respondents said they plan to increase direct mail in 2006; 40 percent plan to increase event marketing; 33 percent plan to increase print advertising.

The survey also found that: 81 percent of marketers plan no changes in their broadcast spending; 80 percent will not change outdoor spending; 46 percent plan no changes in their print and event marketing budgets; 21 percent of respondents will decrease print advertising; 15 percent will reduce outdoor advertising; 14 percent will decrease events and telemarketing spending.

According to BtoB's survey, 24.9 percent of marketers' total budgets will be spent on direct marketing in 2006, up from an average 21.6 percent allocated to direct marketing in 2005.

Primary marketing goals found in the study included: 60 percent of respondents said their primary marketing goal will be customer acquisition; 20.8 percent said brand awareness; 11.5 percent said customer retention; 7.7 percent specified "other."

Other significant marketing objectives identified were: entering new markets; generating leads; increasing revenue; growing market share; proving ROI; and improving brand awareness. For more information visit www.btobonline.com.

Online holiday shoppers valued site design

While over 70 percent of e-shoppers think shopping online is easier than shopping offline, Web design played a key role in 2005 online holiday spending, according to a report issued by San Francisco research firm Questus. Aside from pricing and shipping costs, the report found that over a third of shoppers cited navigation, the checkout process and product descriptions as critical site aspects

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that affected their completion of online purchases.

Appearance also affected e-shoppers, with most (68 percent) citing distrust of sites that didn't appear professional. The report found that a quarter of shoppers left a site if they found it difficult to locate products, and a fifth left because the site didn't seem trustworthy or secure. Additionally, online shoppers preferred fewer links than more links on each Web page.

Required site registration was also a major barrier for shoppers. The report found that nearly a third of online holiday shoppers left a site without making a purchase because they didn't want to register with the site.

Overall online spending was strong during the 2005 holiday season, with 77 percent of Internet users making online purchases and almost 40 percent making half or more of their 2005 holiday purchases online. The report found that online holiday shopping is poised for even more growth in 2006, with 40 percent of online shoppers planning to spend even more online during the 2006 holiday season. The report was based on an Internet survey using Questus' proprietary panel, Big Look. The 425 respondents were all employed U.S.

residents over the age of 18. For more information visit www.questus.com.

Sony ranks as most popular consumer electronics brand

An international survey measuring the health of some of the world's most famous consumer electronics brands reveals that Sony is the most popular brand, while Sanyo is the least popular across all ages, genders and income levels in 18 countries around the world.

In November 2005, the Stewart-Allen/GMI BrandBarometer (www.brandbarometer.com), co-created by marketing consultant Allyson Stewart-Allen and Seattle research firm Global Market Insite, surveyed 17,502 consumers worldwide about 15 leading international consumer electronics brands.

These brands include Apple, Canon, Casio, Dell, Hitachi, Hewlett-Packard, Microsoft, Nokia, Panasonic, Philips, Pioneer, Sanyo, Sharp, Sony and Toshiba. Consumers were asked about their perceptions and experiences of these brands, levels of trust, overall quality and perceived country of origin.

When asked to associate values with a particular brand, BrandBarometer respondents perceive: Sony as "luxurious"; Nokia as "innovative," "friendly" and "engaging"; Apple as the most

"individualistic" and "exclusive"; and Microsoft as "powerful" and the most "American" brand. Sony also scores well in other areas - respondents see the brand as being "international," "trustworthy" and a "luxury" brand. Nokia scores highly for being "customer-focused," for "listening" to its customers, and for being the most "responsive" and "empathetic." Sony and Nokia are also seen as the two most reliable brands out of the 15 surveyed.

However, the BrandBarometer did find some dark clouds on the horizon for other consumer electronics brands. Sanyo appears to have a serious image problem and is regarded as the most "stagnant," "dull," "insignificant" and "weak" of all of the brands in the study.

When it comes to investing in brand recall and intentional associations, large consumer electronics companies clearly dedicate generous marketing and advertising budgets to achieve these:

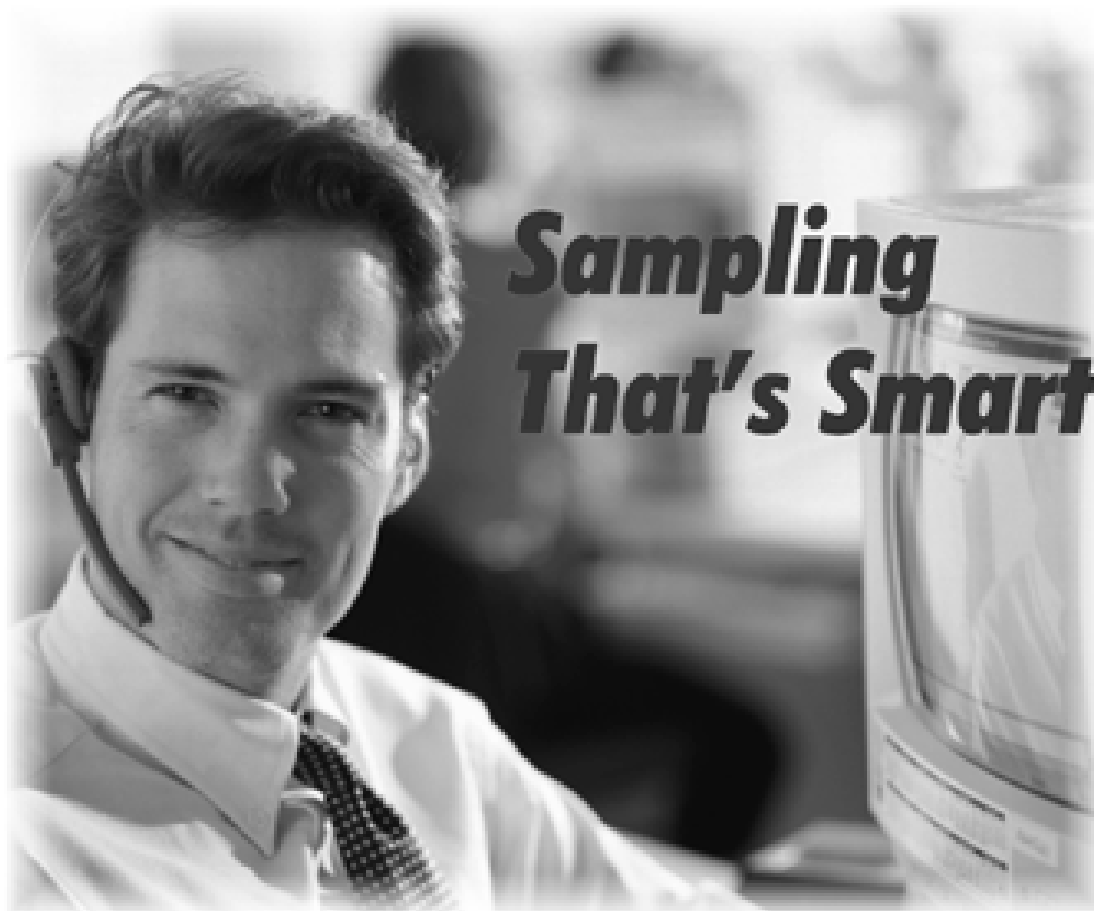
- Microsoft spent \$260 million on domestic measured media during the first 10 months of 2004 (*Adweek*, January 25, 2005).
- Sony's electronics division spent \$150 million on U.S. advertising in 2004 (*Adweek*, September 14, 2005).
- Apple spent more than \$100 million on advertising in 2003, and about \$90 million between January and October 2004, \$70 million of which on iPod ads alone (*MediaWeek*, January 13, 2005).
- Panasonic spent about \$60 million in U.S. media in 2005 (*Adweek*, December 02, 2005).

According to the survey, the power of consumer electronics brands appears to be wavering in Western markets where branding is most sophisticated. When asked how important a brand name is when buying such products, consumers in such countries as the U.K., Germany and Denmark rank brand names as less important compared to others in emerging countries. For instance, consumers in Mexico, China and Brazil rate brand names as either important or very important. To download the full Consumer Electronics BrandBarometer report visit www.brandbarometer.com.



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Product and Service Update

continued from page 14

deliver specific directory usage data for 125 geographies covering 161 DDAs (directory distribution areas). In total, KN/SRI conducted about 75,000 in-depth consumer interviews to produce these 2005 YPMR findings.

Yellow Pages Market Reporter is the result of a process which began when advertisers, ad agencies and certified marketing representatives made a request for independent, third-party syndicated research to aid Yellow Pages advertisers in selecting directories in which to place ads. The rapid growth of multi-directory markets renders this information a necessity for making accurate ad buying decisions, and publishers have responded by funding measures in many DDAs.

Ten publishers participated in the 2005 program: Ambassador Yellow Pages; Associated Publishing Co.; AT&T Yellow Pages; BellSouth Advertising and Publishing Corp.; Cincinnati Bell Yellow Pages; Dex Media, Inc.; RH Donnelley Publishing and Advertising; Verizon Information Services; White Directory Publishers, Inc.; and Yellow Book USA, Inc. The 2005 publisher-funded DDAs collectively represent 30 percent of the total U.S. adult population and encompass almost half (45 percent) of consumers located in A and B county areas. For more information visit www.knowledgenetworks.com.

2005 census estimates now available

Demographic Data Center is now offering its 2005 Estimates, 2010 Projections, Consumer Expenditures and Profiles online. The 2005 Estimates fill in the gap for the five years since the 2000 Census. In addition, the latest consumer expenditures and demographic profiles help businesses that need to know where to market, where to expand and how to allocate resources.

2005 Estimates are based on the U.S. Census Bureau's county estimates and the 2000 long form. It is modeled to the various geographies based on calculations reflecting the expected changes since the 2000 Census. 2010 Projections are the same format as the Estimates, but projected out an additional five years to 2010.

Consumer Expenditures for 2005 include 50+ categories of household spending including topics such as food, small appliances, health insurance and clothing.

Profiles allow users to target areas that meet their desired customer or client profile. Users determine which area most captures that profile's essence, or which profile best describes a particular area. The data is available in five geographies: states, counties, tracts, block groups, and zip codes. Users can also run a radius around a latitude/longitude point. For more information visit www.us-census.biz/estimates/estimates.htm or call 800-577-6717.

New e-commerce suite from WebSureyor

WebSureyor Corporation, Herndon, Va., is now offering its new E-Commerce Solution Pack, which provides a set of integrated products and services to help Internet retailers understand the thinking and motivation of site visitors and online shoppers. Using WebSureyor's online survey platform, the E-Commerce Solution Pack consists of online data collection instruments designed to gather site visitor demographics, examine shopping cart abandonment and understand keyword instrumentation. For more information visit www.websureyor.com.

Briefly

Stamford, Conn.-based FocusVision Worldwide has added three firms to the global network of focus group facilities offering its videoconferencing services - Cook Research in Minneapolis, Opinions Unlimited in Dallas and SIS in New York - bringing the number of facilities to 316.

Stamford, Conn.-based research firm InsightExpress has launched a new corporate Web site at www.insightexpress.com.

Norway-based research software provider FIRM is now offering its Contact Center Quality Application, which enables businesses with contact center operations to implement customer-experience quality measures to discover, manage and act on customer dissatisfaction. The application is built on FIRM's Confrimit survey and reporting software platform. For more information visit www.confrimit.com.

The Keller Fay Group, a research consultancy dedicated to word-of-mouth marketing campaigns, is now offering TalkTrack, a measurement system for word-of-mouth marketing. TalkTrack measures marketing-relevant conversations in the U.S., enabling clients to track word-of-mouth trends, evaluate ongoing campaigns and identify segments and opportunities for potential engagement with consumers. For more information visit www.kellerfay.com.

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Research Industry News

continued from page 16

the acquisition, the combined company, BuzzMetrics, Inc., will operate under the Nielsen BuzzMetrics brand and be headquartered in New York. Nielsen parent VNU will become a majority shareholder in the new BuzzMetrics with 50.1 percent ownership.

Boston research firm **Chadwick Martin Bailey** (CMB) has acquired **Sage Research**, a Framingham, Mass., research and consulting firm serving technology product and service providers. Sage Research will be integrated into CMB as a new technology group.

Germany-based research firm **GfK** now has a 51 percent stake in the market research company **Merc** in Mexico and an 80 percent stake in the market research company **KleimanSygnos** in Argentina. Marcelo de Fuentes, who owns 49 percent of Merc, will continue in his capacity as managing director of Merc. Mónica Kleiman and Norah Schmeichel, who both have a minority shareholding in KleimanSygnos, will continue to act as joint managing directors of KleimanSygnos.

Montreal research firm **Leger Marketing** has acquired **Claros Research Corporation** in Calgary. With the acquisition, Marc Tremblay has been named vice president Calgary of Leger Marketing.

Research International has acquired **Pentor**, an independent Polish market research agency which has been affiliated to Research International since 1991. Pentor is headquartered in Warsaw, with offices in Katowice, Wroclaw and Poznan, and employs 107 people.

Alliances/strategic partnerships

Arbitron Inc., New York, announced that three Houston advertising agencies - **FogartyKleinMonroe**, **Love Advertising** and **Mediagraphix Media Services** - have signed a commitment to use radio audience estimates based on the Portable People

Meter when Arbitron deploys its audience measurement service.

Association/organization news

In a press release outlining trends affecting the research industry in 2006, Larry Brownell, executive director of the **Marketing Research Association** (MRA) cited technology and globalization as two of the main driving forces, along with the growth of relatively inexpensive online survey research methods. "Online research is surging, and within the next few years is likely to become the most common form of all marketing research fieldwork conducted," said Brownell. Problems arise when amateurs hop on the online research bandwagon without the expertise that a professional researcher provides. "A lot of flawed research is being conducted online, and the sample accuracy of online panels is raising questions in the industry," Brownell said. "It's critically important that a bona fide marketing research professional shapes surveys and ensures the correct use of the appropriate tools and techniques."

Although some industry watchers believe new technologies may cause a decline in the role of focus groups, traditional focus groups have been yielding critical guiding insights for many companies for decades, the MRA release stated. Even as online technology expands, industry statistics indicate that the use of focus groups is on the rise, with money spent on focus groups up 6 percent.

While online research gives users the advantage of reaching a much larger quantity of consumers, focus groups provide the kind of accuracy and depth that can emerge from probing, controlled, face-to-face interaction, the MRA said. The goal of the research should dictate which of these and many other research tools is utilized. Often a combination of methodologies is recommended.

Marketing research initiatives have become global in scope, fueling more alliances and/or acquisitions, not only among marketing research vendors, but among research trade organizations as well. Outsourcing, both within the U.S. and overseas, will continue to be seen as

a source of potential cost savings, but, once again, "quality counts." The MR industry will need to ensure that the outsourced survey researchers are up to the task and reflect positively on MR. In the technology industry, for example, outsourced customer service has negatively affected customer relations in some cases when service providers have significant cultural and language differences from their customers.

Today's research professionals play a critical role in the business decision-making value chain, the MRA said. Increasingly quoted in the media, this new breed of well-qualified, experienced researcher can confidently act as a marketing consultant who captures consumer information, analyzes it and provides clients with practical insights to guide decisions based on empirical market data.

In a separate release, Brownell said the MRA's year-old Professional Researcher Certification (PRC) program has exceeded all expectations in terms of number of applicants and interest-level. "We've passed the number of applicants we had set as a goal for the first year and we've just re-configured our goals for year two to be double our original projections based on our experience," he said. "Having a credential for marketing research professionals has been a long time in coming. The overwhelming response is a credit to our profession from which we will all benefit."

The PRC program offers an open application period until February 2007 for those who are currently marketing research practitioners and meet a set of criteria. During this period, candidates are grandfathered in based on their experience, education and ethics, with the application materials providing a full representation of the candidate's expertise. No exam is necessary during this phase, but all of those certified must continue their professional development through education. The PRC examination is currently in development, led by a special MRA committee researchers. The first exam is set to be administered in February 2007.

The Marketing Research

Institute International (MRII), which will celebrate its 10th anniversary in June 2006, has announced its 2006 board of directors. Officers: president – Susan Adelman, Survey Service, Inc.; president-elect – John Kelly, Marketing Direction (Great Britain); secretary/treasurer – Ron Kornokovich, OPINIONation; past president – Terry Grapentine, Grapentine Company, Inc. Directors: David Ashley, Department of Homeland Security; Pam Bracken, University of Georgia; Branimir Brankov, Merck & Co., Inc.; Larry Brownell, Marketing Research Association; Judith Brynildson, Concentric Research; Robert Cohen, Scarborough Research; Patrick Crane, Eastman Kodak Company; Charles (Chuck) Dodson, A.M. Todd Co.; William Douglas, Coca-Cola Company; Denis Evangelista, IBM; J. Patrick Galloway, Galloway Research Service, Inc.; Joel Goodman, Carter's Inc.; Jon Last, The Golf Digest Companies; Robert Leiter, University of Georgia; Srinivas Reddy, University of Georgia (MMR Program); Diane Streckfuss, ARF; Mary Wang, SPSS; Julie Williams, Maritz Marketing Research Inc.; Brenden Wycks, Marketing Research and Intelligence Association (Canada). MRII is a non-profit organization devoted to fulfilling the educational needs of marketing researchers.

Awards/rankings

Mexico-based marketing magazine *Merca2.0* named **ACNielsen** Mexico as 2005's best marketing research agency.

New accounts/projects

New York-based **Nielsen Media Research** and Comcast Spotlight, the advertising sales division of **Comcast Cable**, announced a six-year agreement that consolidates into one single contract all of Comcast's Local People Meter (LPM) services in each of the 10 major television markets where Nielsen provides LPM audience ratings. The agreement covers the local markets in which Nielsen already operates LPM services – New York, Los Angeles, Chicago, Boston, San Francisco,

Philadelphia, Washington, D.C., Detroit and Dallas – plus Atlanta, where Nielsen will roll out LPMs later this year.

Lightspeed Research, Basking Ridge, N.J., has renewed its licensing of the Conformat software from Norway-based research software provider **FIRM**. Separately, **FIRM** announced that **ACNielsen** has also renewed its licensing of Conformat.

Aruba Cruise Tourism (ACT), a non-profit organization of the government of Aruba, selected **Diatouch, Inc.**, a Phoenix, Ariz., software firm, to provide survey and information kiosks in its cruise terminals. In its new "Welcome Back" campaign, ACT is striving to convert cruise passengers into land-based vacationers. Using proximity sensor technology, the kiosks welcome disembarking cruise passengers with Caribbean steel band music

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St. Paul-based **Minnesota Public Radio** (MPR) used the services of Seattle research firm **QuestionPro** to create a conjoint-based online survey, dubbed Medical Matchmaker, which walks listeners who visit the MPR Web site through 12 pairs of hypothetical health care plans, each with a different mix of features. Listeners choose the one they prefer from each pair. The software then compares the chosen plans against those that weren't chosen. At the end, it shows which features the respondent really cares about (cost, choice of provider, etc.) and which general type of health insurance plan best fits their priorities. MPR news staff will use information provided by those who use Medical Matchmaker to help design future news coverage on health care. The online survey is available at www.mpr.org/medicalmatchmaker.

Arbitron Inc., New York, announced that media firms the **Interpublic Group**, **WPP** and **Carat Americas** have signed contracts to use Arbitron's Portable People Meter-based radio audience estimates.

Separately, **Arbitron Inc.** and **VNU** announced that **Unilever United States** has signed a subscription agreement to the pilot panel of Project Apollo, the single-source, national research service based on Arbitron's Portable People Meter system and ACNielsen's HomeScan technology. Unilever is one of six advertisers and who, along with their advertising agencies, are members of the Project Apollo Steering Committee, a group of marketers who have signed or are in the process of signing agreements for the Project Apollo pilot panel data.

Republic Beverage Company has

renewed its business relationship with Chicago-based research firm **Information Resources, Inc.** Under the multi-year contract, IRI will continue to provide services to Republic Beverage in Arizona and Louisiana and will expand services to include operations in Texas. Republic Beverage is the fourth largest distributor of premium wine and spirits in the U.S.

New companies/new divisions/relocations/expansions

Research firm **TNS** has announced organizational changes to its U.S. custom research division. It has consolidated its IT, telecom and media and entertainment units into one broad technology sector; established a new "Client Solutions" group to address strategic business issues and create new research solutions and technologies, and; created an expanded multi-country project team within TNS Operations to support global clients' multinational research.

Former McCann Erickson executive Alison Gilbertson has opened a new research firm, **Unravel Research and Planning**, in the U.K. The firm's Web site is www.unravelresearch.co.uk.

Australia-based **Pulse Group**, a research process outsourcing firm, has opened an office in Amsterdam to enhance client servicing and support for its European clients.

Ed Keller, former CEO of Roper ASW, and Brad Fay, former managing director, have formed the **Keller Fay Group**, a research consultancy dedicated to word-of-mouth marketing campaigns. The firm's Web site is www.kellerfay.com.

Company earnings reports

For the fourth quarter 2005, ended December 31, New York-based **Arbitron Inc.**, reported revenue of \$75.3 million, an increase of 3.3 percent over revenue of \$72.9 million during the fourth quarter of 2004. Costs and expenses for the fourth

quarter increased by 2.7 percent, from \$62.1 million in 2004 to \$63.8 million in 2005. Earnings before interest and income tax expense (EBIT) for the quarter were \$17 million, an increase of 0.4 percent compared with EBIT of \$16.9 million for the fourth quarter of 2004. Interest expense for the quarter declined 43.9 percent, from \$1.7 million in 2004 to \$0.9 million in 2005, due to reductions in the company's long-term debt.

Net income for the quarter was \$11.2 million, compared with \$9.6 million for the fourth quarter of 2004, an increase of 16.2 percent. Net income per share for the fourth quarter 2005 increased to \$0.36 (diluted), compared with \$0.31 (diluted) during the comparable period last year.

For the year ended December 31, 2005, revenue was \$310 million, an increase of 4.5 percent over revenue of \$296.6 million for 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 year of 5.2 percent, from \$205.7 million in 2004 to \$216.3 million in 2005.

EBIT for 2005 increased 3 percent to \$101.4 million compared with \$98.4 million in 2004. Income tax expense for 2005 was \$33.2 million, an increase of 7 percent over \$31.1 million in 2004. Net income for 2005 increased 11.1 percent to \$67.3 million compared with \$60.6 million in 2004. Net income in 2005 was \$2.14 per share (diluted), compared with \$1.92 per share (diluted) last year. In 2005 and 2004, the company recognized a tax benefit relating primarily to the reversal of certain liabilities for tax contingencies related to prior periods in the amounts of \$4.7 million and \$4.2 million, respectively.

Knowledge Networks, Menlo Park, Calif., announced it has surpassed previous records for quarterly and annual revenue, posting over \$9 million in fourth quarter (2005) revenue and \$32 million for the year overall, a significant increase over 2004.

2006

Data Processing and Statistical Analysis Directory



The 2006 Directory of Data Processing and Statistical Analysis was compiled by sending listing forms to firms we identified as providers of data processing and statistical analysis services. This year's directory lists nearly 300 firms, arranged alphabetically. In addition to the company's vital information, we've included the types of data processing services they provide (coding, data entry, data tabulation, scanning services and statistical analysis). A cross-reference of these services is also offered for your convenience.

The Directory of Data Processing and Statistical Analysis begins on page 76.

The cross-reference of data processing services begins on page 99.

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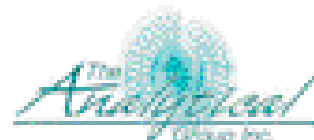


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(See advertisement on p. 83)

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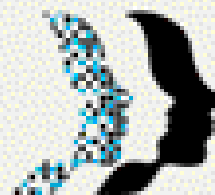
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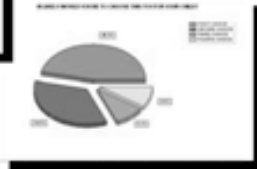
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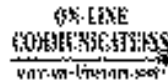


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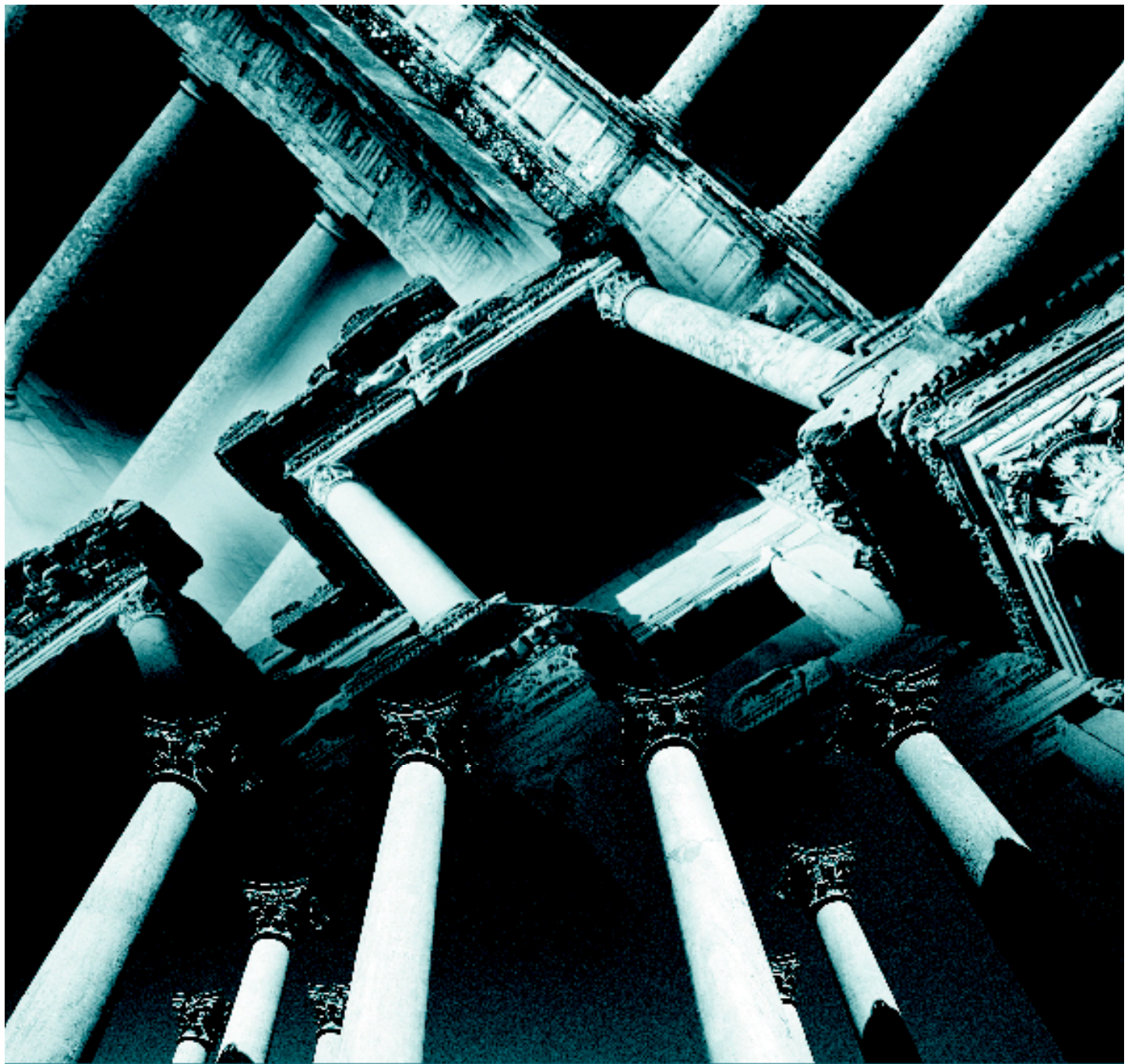
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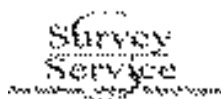
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continued from page 12

FIRM's San Francisco team. **Wale Omiyale**, director of market research business development, will lead the team in London. He will add the accounts throughout Scandinavia previously managed by FIRM's Oslo office.

Cook Research & Consulting, Inc., Minneapolis, has named **Gayle Belkengren** vice president.

Dallas researcher *Parks Associates* has promoted **Stuart Sikes** to president.

SPSS, Chicago, has named **Mark Nelson** vice president and general manager of its Dimensions product line.

Doane Marketing Research Inc., St. Louis, has named **Chance Genovese**



Genovese

King

and **Bruce King** senior sales and marketing manager.

London research firm *Research Now* has opened an office in Hamburg, Germany. To support the new office, **Oliver Wölfel** has joined Research Now as client development manager. **Thomas Lapperger**, business development director, and **Sandra Bilz**, client service manager, will also work out of the new office.

Invoke Solutions, a Wellesley, Mass., research firm, has named **Alon Ravid** chief technology officer.

Anderson Analytics, a Stamford,

Conn., research firm, has named **Jesse Chen** senior consultant and developer.

Research firm *MORPACE International, Inc.* has promoted **Sharna Morelli** to senior vice



Morelli

Hurst

president. She is based in the company's corporate office in Farmington Hills, Mich. In addition, the firm named **David Hurst** and **Donna Taglione** research director.



Taglione

Edbrooke

Dresher, Pa.-based *TVG Marketing Research and Consulting* has appointed a new senior management team, naming **Tim Edbrooke** senior vice president, strategic account management and marketing; **Karen Fender**



LeSieur

Fender

senior vice president, research excellence; and **Karen LeSieur** senior vice president, strategic mar-

keting and development.

Five new employees have joined Cincinnati research firm *MRSI*: **Pam McHugh** as vice president, client services; **Sharon Myers** as account manager; **Colleen Clark** and **Melissa Van Ryzin** as senior research analyst; and **Robert Enzweiler** as research analyst. The new additions will be based in Cincinnati, with the exception of McHugh, who will work out of the company's client service office in Chicago.

New York researcher *BuzzMetrics* has added **Gary Stein** to its client services department.

Stamford, Conn., research firm *InsightExpress* has named **Brian Tarnok** senior accountant, a new position within the company's finance department.

Research firm *Millward Brown* has appointed **Robert Vinet** to head its French business. Vinet replaces outgoing French Managing Director **Liz Musch**, who leaves to join WPP sister company, Added Value.

GrayHair Software, a Mount Laurel, N.J., maker of mail industry products, has named **Robert Tiedeken** market research director.

IMS Health, a Fairfield, Conn., research firm, has named **Gilles V.J. Pajot** executive vice president and president, global business management. He will be based in Fairfield.

New York-based *Ipsos Insight* has named **Arthur Eisenbach** senior vice president and general manager of its financial services practice.

John Polich has joined the Princeton, N.J., office of Australia-based *Roy Morgan International* as senior vice president.

index of advertisers

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Two new B2B research books double your pleasure

While there are numerous books on marketing research and its many methodologies, books on business-to-business research have been few and far between. With such an uneven history, the appearance last year of two worthwhile books on the topic came as quite a surprise. They are similarly titled, so bear with me here.

The first, *Business-to-Business Marketing Research*, is actually a second edition of a 1995 book (which, to further muddle things, bore the title *Business-to-Business Market Research*). Ten years after their first foray, authors Martin and Tamara Block have updated and expanded the initial edition. They provide a thorough, academic-style overview of the business-to-business research process - everything from planning to data collection to analysis - paying special attention to the use of focus groups and other forms of qualitative (covering topics such as moderating techniques, structuring the discussion guide, and group composition).

As a stats-impaired person, I found the chapters on analytical tools, conjoint analysis, multidimensional scal-

ing and preference mapping helpful, as they explain widely-used techniques in language even I could understand. The book also comes with a CD, pre-loaded with Excel- and SPSS-formatted datasets that readers can explore and manipulate.

Nice complement

The other book, *Business to Business Market Research*, by Ruth McNeil, is a nice complement to the Blocks' book. McNeil's book has a "user's guide" feel to it. Her style is more conversational and collegial, as if an experienced friend is giving you the benefit of her on-the-job experience. (Turn to page 36 of this issue to read a chapter excerpt.) The book also feels a bit more modern, referencing the Internet and its various research-assisting capabilities in greater depth than the Blocks' book.

As with the other entries in Britain's Market Research Society's excellent Market Research in Practice series, this book is aimed at a wide audience (students, research professionals and non-professionals) so it has content - such as chapters on training and on regional differences and comparisons of B2B research around the world - that

may be more useful to those considering a career in B2B research.

But there is still plenty of valuable material here for established researchers. Helpful appendices include several sample questionnaires and listings of information sources. The qualitative chapter is particularly good. McNeil covers the whole process, from interviewing tips and techniques to several good pages on presenting qualitative research results. Quantitative B2B research is covered equally well. McNeil explores many and varied examples of quantitative question types and takes you through the quantitative process, from questionnaire development to analysis and reporting.

In case it's several years before the next spate of books on B2B research, these two texts should serve as a nice tandem to tide over interested readers. | Q

Business-to-Business Marketing Research (278 pages; \$69.95), by Martin and Tamara Block, is published by Thomson (www.thomson.com/learning/texere).

Business to Business Market Research (310 pages; \$37.50), by Ruth McNeil, is published by Kogan Page (www.koganpage.com).



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