# QUIRK'S

## Marketing Research Review

DECEMBER 2006


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Quirk's Marketing Research Review
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# contents

## techniques



## columns



## departments




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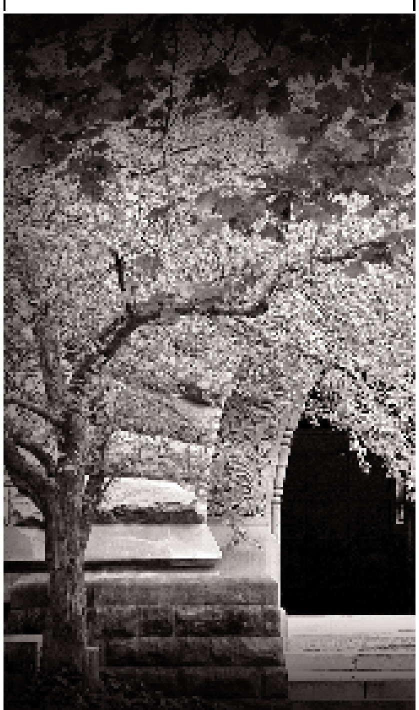

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# in case you missed it...

news and notes on marketing and research

## Electronic gadgets set to rule this holiday season

Consumer electronics (CE) gifts will account for a quarter of all holiday gifts, with revenues reaching $21 billion this holiday season, compared to $17 billion (21 percent) in 2005, according to a study by the Consumer Electronics Association (CEA).

According to the CEA's annual Holiday Purchase Patterns study, overall household spending for the holidays (factoring in gifts, decorations, food, travel and other assorted holiday expenses) will be up 14 percent this year to $1,625. Of that, half will be spent on gifts - a 27 percent increase compared to last year - and consumers will spend $195 on average for CE gifts.

"The upgrade cycle is driving a lot of this growth," said the CEA's Director of Industry Analysis Sean Wargo. "Lured in by the declining prices on many new digital products, consumers are spending more for consumer electronics on average than they have in the past. An example of this is the MP3 player versus the portable CD player. The initial price for an MP3 player is higher than the initial price five or 10 years ago for a portable CD player."

The survey also tracked what consumer electronics consumers want the most (wish-list items) and what they are mostly likely to give (gift-list items) this holiday season. For the second year in a row, MP3 players topped the wish list among adults. The rest of the Top 10 list included: all types DVD players/recorders, digital cameras, laptops and PCs, televisions, video game systems, cellular phones, camcorders and HDTVs.

Topping the gift list, or what consumers actually plan to buy, this holiday season are digital cameras, cellular phones, MP3 players, video game consoles, portable CD players, carrying cases, cordless phones, additional memory for digital cameras, laptops and clock radios.

For the third year in a row, CEA also surveyed teen participants aged 12-17. Rounding out the top three CE wish-list items for teens were MP3 players, video game consoles and computers. "Our survey also measured where technology ranks in consumers' overall holiday wish list. For adults, most wanted clothes, peace and happiness, money, computers and digital cameras. For teens, clothes, CDs books, video games and money are the most desired gifts this holiday season," Wargo said.

## These stores don't have a healthy appetite for healthier snacks

Retailers can be an unexpected barrier to healthy eating, according to an October *Wall Street Journal* article. The story detailed PepsiCo's difficulties in convincing Chicago convenience store owners to stock its line of baked snack products.

Fearing that the baked products won't sell as fast as their less-healthy cousins, some store owners - particularly the smaller, independent operators - prefer to give the most room to the old standbys like Flamin' Hot Cheetos. In addition, with their pay tied to sales, PepsiCo salespeople are hesitant to force store owners to stock the baked products.

The article is an interesting look at the process undertaken by a major food company to improve the image of its product offerings. Creating and perfecting a line of healthy snacks is just the beginning. The hard part is earning retail shelf space and also fending off the attacks of skeptical commentators, who view the go-healthy efforts as little more than calculated ploys to fend off class-action lawsuits.

"Pepsi Sales Force Tries to Push 'Healthier' Snacks in Inner City," *Wall Street Journal*, October 5, 2006

## Booklet urges Hispanic consumers to eschew American eating habits

The Facts, Figures, & The Future e-newsletter (www.factsfiguresfuture.com) reported on efforts by the Latino Nutrition Coalition (LNC) to issue a booklet urging Hispanics to return to their culinary roots.

The longer Latinos live here and acculturate, the likelier they are to adopt an American diet and lifestyle that produces rampant obesity and diabetes. Not surprisingly, these conditions are surging among the 41 million Latino populace here - to a point where Type 2 diabetes is already 150 percent more prevalent than among whites, says the American Diabetes Association. "When they come to the U.S., they're young and healthy. In five years, their diet changes. We need to reverse this trend," said Liz Mintz, manager of the LNC, a group formed by Oldways Preservation Trust, a Boston-based non-profit food-issues think tank, which previously conceived the Mediterranean Diet Pyramid and the Whole Grains Council.

LNC has created a 16-page passport-size bilingual booklet titled "Camino Magico" (Magic Road) to urge a return to the traditional Latin American diet. One million copies will be distributed to community influentials (churches, health centers, retailers) in Miami and parts of California and Texas by January/February 2007, and to New York and Chicago soon after.

LNC predicts the effort will spur sales activity in these categories: frozen and canned vegetables; soups; soy milk; tortillas, tamales, arepas and pandebono; spices such as cumino, recaito and achiote as alternatives to salt; rice; beans, specifically black, red, pinto, chick peas and lentils; cheeses such as campesino and casero; fruit juices such as lulo, guanábana and maracuyá; cereals, particularly oatmeal as a beverage ingredient to make it healthier and more substantial (example: avena - made of milk, cinnamon and oatmeal).

To encourage free distribution of the booklets in stores with heavy Latino populations, LNC is offering retailers their chain logo on the cover, so customers will see them as a caring authority on healthful eating. LNC will also provide manufacturer sponsors in the booklets, as well as display racks, and will train retailers to host cooking demonstrations in-store. "We'll make it easy for people to buy everything they need to reproduce the meal. As we teach them healthier cooking and give them methods to cook, they'll eat less at fast-food restaurants, and retailers will gain," said Mintz. For more information visit www.latinonutrition.org.

## Coffee culture: a global phenomenon?

Consumers the world over are highly in favor of coffee giants and the vast array of choices they offer, reveals research agency Synovate.

In a study that sought to illuminate coffee culture around the globe, Synovate spoke to 5,806 respondents in the U.S., U.K., France, Brazil, Hong Kong, Singapore, Serbia, Morocco and Australia. Overall, 76 percent of respondents agreed that "large multinational coffee chains are good because they expand choices for consumers."


However, it's clearly a trade-off between enjoyment and principles for many, with 28 percent also agreeing that these "large multinational chains have negatively impacted local culture."

According to the survey, a huge 74 percent of Moroccans agree that coffee from large international chains is of better quality than coffee from small, independent shops. Next came Hong Kongers at 50 percent, closely followed by Brazilians. Surprisingly, Australians and Americans show particularly low agreement on this score (11 percent and 14 percent respectively), suggesting that these nations are more likely to support the "little guys."

When asked whether these chains have negatively impacted local culture, Moroccans again answered yes in the largest numbers, a paradox which suggests an element of moral conflict in their coffee choices. At the opposite end of the spectrum, however, only 11 percent of Hong Kongers and 20 percent of Serbians felt this was an issue. "Asians don't have the almost automatic negative reaction to big business that Westerners seem to have. They are much more accepting and tolerant of big companies. Perhaps this finding says more about the West than about Asia," says Jill Telford, Synovate managing director Hong Kong.

What is the favorite type of coffee bought outside the home? While preferences vary from country to country, it seems that the majority of us prefer the simpler things in life. Almost half of the U.S. respondents would opt for regular coffee, along with some two out of five Brazilians and French and about a third of Brits and Singaporeans. Meanwhile, the cappuccino is king in Australia (45 percent) while Moroccans love their lattés (38 percent). Unsurprisingly, espresso is relatively popular in France, while mocha seems to go down better in Singapore and Hong Kong than anywhere else.

When asked which coffee shop or café first comes to mind for quality ready-to-drink coffee, a majority of respondents from Hong Kong and the U.S. mentioned Starbucks. The ubiquitous coffee giant was also recalled by a significant proportion of Brits and Singaporeans.

Over in France, however, unspecified bars, restaurants or cafés were top of mind, with Starbucks cited by a mere 2 percent. The top result for Australians was Gloria Jean at 32 percent, while two in five Serbians mentioned Nescafé.

This latter finding makes sense to Synovate Serbia's Milica Vulicevic: "Ready-to-drink coffee is very expensive for people in Serbia - the country is suffering economically, and considering that people here easily drink five to 10 coffees a day, most will opt for instant."

It seems that the English (63 percent), Australians (70 percent) and particularly the Moroccans (90 percent) are glugging coffee the entire day. The Asian markets, however, hold the fewest caffeine-lovers, with only 21 percent of Hong Kongers and 44 percent of Singaporeans reliant on their morning coffee and as little as 12 percent and 31 percent, respectively, admitting to drinking coffee throughout the day.

Finally, it seems that "coffee culture" as typified (or perhaps accelerated) by popular American sitcoms is very much alive and well in the markets surveyed. Unsurprisingly, 78 percent of respondents overall prefer to buy coffee from a café that has an inviting atmosphere. Moreover, four out of five Serbians, two-thirds of Moroccans and nearly two-thirds of the French say that the main reason for going to a coffee chain shop or café is to hang out with friends, rather than for the coffee itself. Ironically, Americans came lowest on this score - only 14 percent agreed versus an average of 44 percent across all countries! For more information visit www.synovate.com.

continued on page 72

# names of note

*Motorola Inc.*, Schaumburg, Ill., has named **Kenneth C. "Casey" Keller, Jr**. executive vice president and chief marketing officer. Marketing research will be among his new responsibilities.

Los Angeles-based *Fox Sports en Español* has named **Kim Porter** director of research.

Porter Irizarry de López

Research firm *Yankelovich Inc.*, Chapel Hill, N.C., has added **Suzanne Irizarry de López** as associate director of multicultural research.

**Merlene Cummins** and **Kelly Smith** have been named senior qualitative research professional at *MarketVision*, a Cincinnati research firm.

*Arbitron Inc.*, New York, has named **Marilou Legge** senior vice president, organization effectiveness. **Thomas F. Mocarsky** has been named senior vice president, press and investor relations. **Al Tupek** has joined Arbitron Inc. as chief statistical officer.

Dallas-based *Kimberly-Clark Corporation* has named **Anthony J. Palmer** chief marketing officer. Marketing research will be among his new responsibilities.

*Harris Interactive,* Rochester, N.Y., has named **John Fricker** vice president, senior consultant of its loyalty research practice.

*Lightspeed Research*, Basking Ridge, N.J., has named **Darren Fifield** chief executive officer, Asia Pacific. He will be based in Singapore.

*Maritz Research*, St. Louis, has named **Mark Rein** director, strategic consulting, for its retail group.

Digital check-capture firm *Panini North America*, Dayton, Ohio, has named **Greg Brown** product marketing manager. Marketing research will be among his new responsibilities.

Vienna, Va., data security firm *Cloakware Inc.* has named **Greg Coticchia** chief marketing officer and senior vice president. Marketing research will be among his new responsibilities.

Vancouver research firm *Angus Reid Strategies* has named **Chris Ferneyhough** vice president in its Calgary office. Also in the Calgary office, **Monique Morden** has been named senior vice president, client service and managing director, Western Canada.

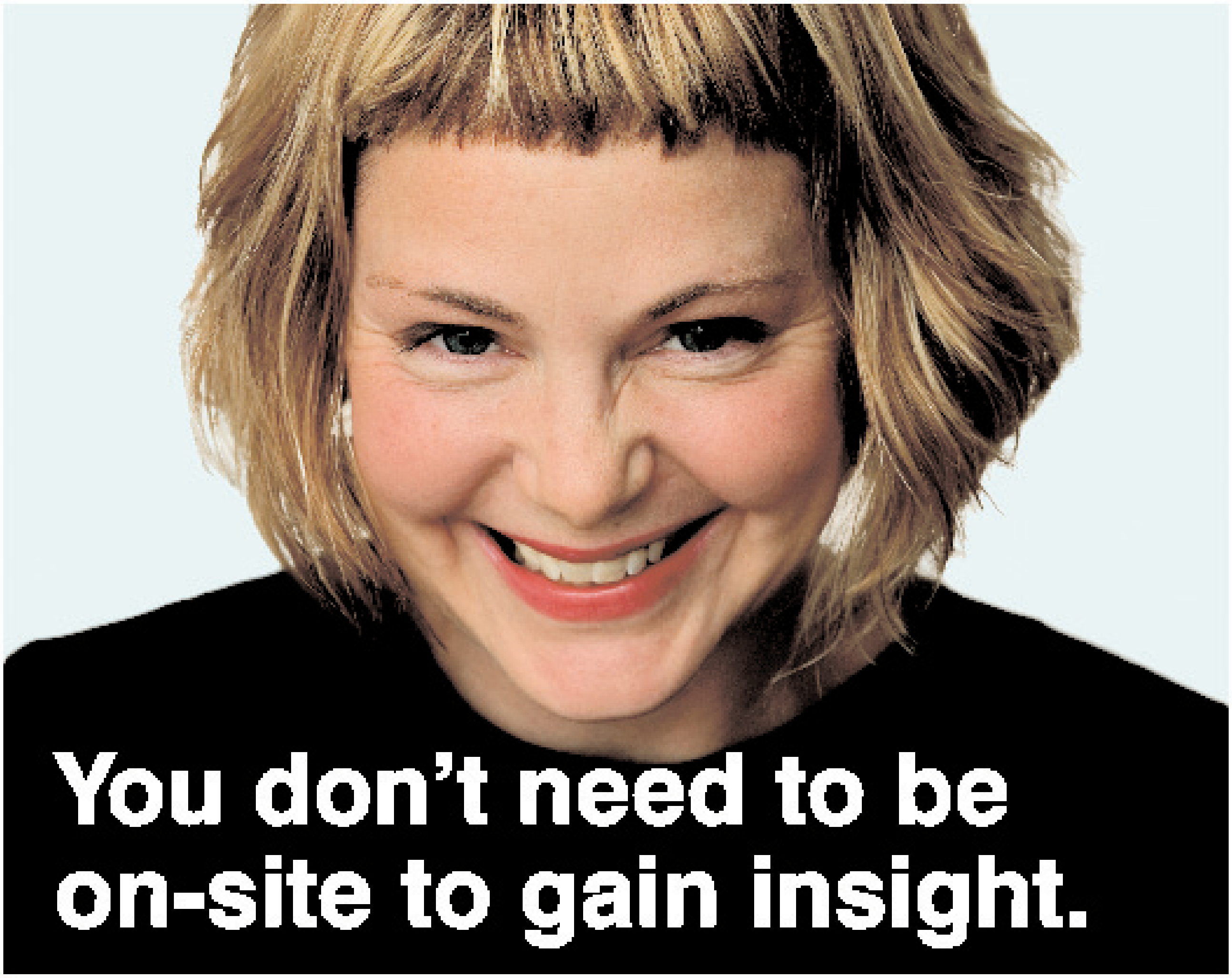
Ferneyhough Morden

Research firm *Synovate* has appointed **Uday Kagal** to head its branch in Mumbai, India.

Columbus, Ga.-based insurer *Aflac* has named **Jeff Herbert** to the newly created position of senior vice president, chief marketing officer. Marketing research will be among his new responsibilities.

New York apparel maker *Kellwood*

continued on page 82

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# product and service update

## MarketTools adds mobile phone research capability; debuts Hispanic health care study

San Francisco research firm MarketTools is now offering MarketTools Mobile, which lets marketers use the mobile phone as a data collection tool. The product covers all aspects of gathering feedback - from recruiting mobile survey panelists, to designing and deploying the survey, to seeing the data in real-time through a Web-based portal.

According to the GSM Association, there are nearly 2.5 billion wireless subscribers worldwide, meaning companies now have a viable option for providing surveys to consumer audiences via mobile devices. In a survey conducted with more than 400 consumers, MarketTools found that more than 80 percent of respondents want to give their opinions from mobile devices on topics such as shopping, trial product usage or mobile phones themselves. Additional high interest areas include movie evaluations and television programming. The primary benefit of taking surveys on mobile phones cited by consumers was "being able to take surveys anytime, anywhere" plus "ease and convenience."

The service uses text messaging and mobile Internet technologies to connect respondents to an interactive survey on their mobile devices. There are two kinds of survey options. MarketTools Mobile Outbound allows companies to reach select panelists from MarketTools' ZoomPanel Mobile (a nationally representative sample of mobile users who have agreed to take surveys from their mobile devices) by sending a text message directly to the panelists, which links to a survey on their mobile devices. MarketTools Mobile Inbound prompts consumers in stores to take a survey at the point of sale by sending a text message to a predefined short code. The text message received by MarketTools Mobile Inbound responds with another text message that links consumers directly to the survey on their mobile devices.

Separately, the firm has debuted its Hispanic Reach Health and Wellness Study, a syndicated research report examining the perceptions, expectations and behaviors of the U.S. Hispanic community in the areas of nutrition, lifestyle and health care.

Targeted towards advertisers, marketers and market researchers, this report is designed to enable companies to better understand U.S. Hispanics' attitudes toward health care and healthy living in order to more effectively market to those audiences. For more information visit www.markettools.com.

## How far does in-store reach?

A consortium of manufacturers and retailers spearheaded by the In-Store Marketing Institute has created a tool for measuring in-store consumer reach at the category level. The model was verified by research conducted at four retailers in spring 2006.

The measurement model predicts consumer reach by category or area of the store, by retail format and by day of the week.

While in-store marketing has long been an element of the consumer marketing mix, its potential value as a brand-building vehicle has never been objectively assessed, largely because there hasn't been a way to accurately measure the total reach of a campaign conducted at retail. By establishing a common metric that can be understood by both brand marketers and retailers, this model aims to eliminate that obstacle.

Named the Pioneering Research for an In-Store Metric (P.R.I.S.M.), the measurement model is the brainchild of the In-Store Metrics Consortium, an ad hoc coalition formed last fall under the institute's guidance involving retailers Albertsons, Kroger, Walgreens, and Wal-Mart and manufacturers 3M, Walt Disney, Coca-Cola, Kellogg, Miller Brewing and Procter & Gamble.

The consortium's research team began working last spring on the theory that, by predicting in-store traffic, then determining what marketing communications are in the store - i.e., measuring compliance - a calculation could be made on the "opportunities to see" a specific

continued on page 75

## Calendar of Events January-March

The Great Lakes, Atlanta/Southeast, Chicago and Florida chapters of the Marketing Research Association will hold their annual joint chapter conference on January 17-19 at the Double Tree Grand Key Resort, Key West, Fla. For more information visit www.mra-net.org.

The American Society for Quality will hold a conference on Six Sigma on February 12-13 at the Pointe Hilton Tapatio Cliffs Resort in Phoenix. For more information visit www.asq.org/conferences/six-sigma/index.html.

ESOMAR will hold a conference on retailing on February 19-21 in Valencia, Spain. For more information visit www.esomar.org.

IIR will hold a conference on linkage strategies on February 26-28 at the Seminole Hard Rock Hotel and Casino, Hollywood, Fla. *Quirk's* readers can receive a 15 percent discount by mentioning the code XM1908QRK when registering. For more information visit www.iirusa.com/customer.

ESOMAR will hold a conference on the Asia-Pacific market on March 12-14 in Kuala Lumpur, Malaysia. For more information visit www.esomar.org.

IIR will hold a conference on marketing on March 19-21 at the Venetian hotel in Las Vegas. For more information visit www.iirusa.com.

The American Marketing Association will hold a conference on applied research methods on March 19-22 at the Renaissance Chicago Hotel. For more information visit www.marketingpower.com.

IIR will hold a conference on new product development for services on March 21-23 at the Rancho Bernardo Inn, San Diego. For more information visit www.iirusa.com.

Britain's Market Research Society will hold its annual conference on March 21-23 at the Hilton Brighton Metropole, Brighton, England. For more information visit www.mrs.org.uk.

IIR will hold a conference on youth marketing on March 25-28 at the Huntington Beach Resort and Spa, Huntington Beach, Calif. For more information visit www.iirusa.com.

IIR will hold a conference on achieving customer service excellence on March 26-28 at the Disney Grand Californian Hotel, Anaheim, Calif. For more information visit www.iirusa.com.

The Northern California Pacific Northwest, Southern California and Southwest chapters of the Marketing Research Association will hold their annual Las Vegas conference on March 28-30. For more information visit www.mra-net.org.

*To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail us at editorial@quirks.com.*

## News notes

**Target Research Group**, Nanuet, N.Y., celebrated its 20th anniversary in October.

Pollster John Zogby, president and CEO of **Zogby International,** Utica, N.Y., will host a one-hour weekly radio program, Pulse of the Nation, which will air on the Nova M Radio network, based in Phoenix. (At press time the date of the show's debut was unknown.) Focusing on polling data on a variety of topics, each program will include expert guests and audience participation. The show will be heard on affiliates across the nation and will also be streamed live at the network's Web site www.novamradio.com.

Arbitron Inc., New York, has filed a patent infringement suit against International Demographics Inc. (dba the Media Audit), Ipsos Group S.A., Ipsos ASI Inc., Ipsos America Inc. aka Ipsos North America and Ipsos Media (collectively "the Ipsos entities"). The complaint, filed in the United States District Court for the Eastern District of Texas, alleges that International Demographics and the Ipsos entities are infringing three patents owned by Arbitron, United States Patents No. 5,787,334, No. 5,574,962 and No. 5,483,276, each relating to electronic audience measurement technology.

In its suit, Arbitron seeks a permanent injunction against International Demographics and the Ipsos entities, in addition to adequate compensatory damages as determined by the court.

**NetRatings Inc.,** New York, and **Coremetrics**, San Mateo, Calif., announced in October the settlement of NetRatings' patent infringement action against Coremetrics. Under the terms of the settlement, NetRatings has dismissed all pending legal claims and has licensed its patent portfolio to Coremetrics, granting worldwide rights under all of NetRatings' patents. The financial terms of the settlement were not disclosed.

India's **Great Lakes Institute of Management** has created the Kotler-Srinivasan Centre for Research in Marketing to develop knowledge in marketing, focusing on research in India and its global role. The center is named for Professor Philip Kotler, S.C. Johnson & Son Distinguished Professor of International Marketing of the Kellogg School of Management, and V. Seenu Srinivasan, the Adams Distinguished Professor of Management at the Stanford Graduate School of Business. Great Lakes Institute is located in Chennai in the Indian state of Tamil Nadu.

Norway-based research software company **FIRM** has formed the Confirmit advisory board to provide a link for the Confirmit R&D team and FIRM's executive management to meet with research industry executives. Board members are: Tony Cowling, president and special advisor at TNS; Ben

continued on page 78

By Trish Lenahan

# Using pre-work to boost the value of online discussion boards

Qualitative research is an effective tool for discovering the emotional connections among products, brands and consumers. Online qualitative research, however, has been called a poor sister to traditional face-to-face research, as the subtleties of nonverbal communication are lost. Yet the strength of the written word – the depth and introspection of a letter or journal compared with a conversation – can make the output of online research a powerful alternative to the focus group, a different window into the soul of a respondent.

We have found real success using intensive pre-work prior to a group discussion board – essentially two stages of research. In our most recent case, each participant maintained a four-day journal of behaviors and emotions, followed by a three-day group discussion board. As the discussion board commenced, participants shared their learning from the journals, exclaiming about similar and different experiences among them. The shared journaling quickly opened the door to rich discussion over subsequent days and to personal enjoyment that, for some, was worth the time spent regardless of compensation. Over several days, one group shared a birthday and the hospitalization of a parent – supporting each other with words of celebration and concern as well as virtual cake and flowers.

Online research – whether pre-work journaling or the group discussion board – offers the unusual opportunity to send the participant out to their world and then have them return to tell you about it a number of times a day. Moments can be captured the day they happen, rather than recalled later. Shopping or pantry checks can be shared immediately. Busy people can give their thoughts when convenient, rather than at a particular time and place. Moments of pain or anger or joy can be shared in relative anonymity, identified by a first name or pseudonym.

To harness the power of online research, the moderator is the guide, the coach, the cheerleader and the one taking attendance – for the pre-work as well as the discussion board. Participants are anxious, wondering if they are doing things correctly, looking for the check-ins of the moderator to acknowledge their efforts, redirect as necessary and encourage their progress. And there are always those wondering if you notice their absence.

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As with homework for traditional groups, there are important aspects to consider for an online assignment:

• For online research to be successful, participants must want to check in – to see what's happened or make entries in the journal. The pre-work or discussion board questions need to be inviting, visually enticing for the participant and easily understood. There is little opportunity to reframe a question because participants log off with no intention of revisiting what has been completed.

• The moderator needs to be a trusted companion along the way, particularly for the independent portion of the research. As a real person

caring about the respondent and their questions, the moderator sustains the respondents while they complete their tasks, validating and directing their efforts.

• As with face-to-face work, learnings from the pre-work stage are acknowledged and discussed, recognizing the effort of each participant. In addition, participant compensation reflects the total effort for all parts of the research.

• Selective use of incentives or prizes, if consistent in theme with the topic, can help maintain energy and involvement throughout the duration of the project. The most powerful incentive is the fun of participation. Yet, a lottery or product prize among those participating on schedule can motivate participants to keep the project top of mind. This level of involvement is key because a participant who keeps up with the questions has time to discuss and explore ideas with other participants, compared with someone doing two days' worth of entries at once.

• The discussion board Web platform used should have a vehicle for quickly capturing attendance/participation, giving the moderator the information needed to understand who has yet to participate, as well as facilitating the award of any prize or incentive.

• As participants log in, complete the independent pre-work/journal and then log out, regular personal e-mails are vital communication to acknowledge and support their efforts. The e-mailing capability of a discussion board platform is critical to the care and feeding of online respondents, especially in a solo phase of the project.

## Experience the depth

So don't be afraid of the online environment – jump in and experience the depth that comes when participants feel free to share their thoughts and feelings from the privacy and sometimes anonymity of their computers. And let pre-work or journaling "prime the pump" – building shared experiences and community before the discussion starts. | Q

By Rajan Sambandam

# Scale conversions

A considerable amount of customer satisfaction data is collected using tracking studies. While continuity is particularly important in tracking studies, sometimes situations arise where major changes are necessitated. One such change is moving from one scale (say, five-point) to another scale (say, 10-point). There could be many reasons for that kind of change, but it raises the obvious question: How can data collected using the two scales be compared? There are two possible ways of approaching this problem: scale equivalence and re-scaling. In both approaches the objective is to aid the researcher in comparing data that are measured in different ways and make informed decisions. In this article we take a deeper look at these two approaches to scale conversions. The underlying assumption here is that the scale wording is sufficiently comparable that scale conversions can be attempted.

• *Scale equivalence*

In this approach no attempt is made to modify the data in any way. Instead the focus is on identifying the appropriate way of reporting that would enable scores to become comparable. This wouldn't be applicable in all situations and is primarily useful in situations where "boxed" scores (top-two box, top-three box, etc.) are reported.

Consider four scales (in terms of scale points) that are used commonly in marketing research: five-point, seven-point, 10-point and 11-point scales. Often the results of a study using these kinds of scales are reported using boxed scores. Questions then relate to how a study using a five-point scale and reporting on "top-two box" scores can be translated when the new scale has, say, seven points. In the approach of scale equivalence we look at the proportion of a scale each scale point covers.

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For example, each scale point on a five-point scale covers 20 percent of the scale. That is, if we were generating completely random data to respond to this scale, we would expect approximately 20 percent of the responses to be 1, 20 percent to be 2 and so on. Therefore, a top-two box score would cover 40 percent of the scale points on a five-point scale. Similarly, for a seven-point scale, each scale point accounts for approximately 14 percent of the scale and top-two box scores would account for about

Table 1

| Scale | Top 1 | Top 2 | Top 3 | Top 4 | Top 5 |
|---|---|---|---|---|---|
| 5-point | 20% | $\boxed{40\%}$ | | | |
| 7-point | 14% | 28% | $\boxed{42\%}$ | | |
| 10-point | 10% | 20% | 30% | $\boxed{40\%}$ | |
| 11-point | 9% | 18% | 27% | $\boxed{36\%}$ | $\boxed{45\%}$ |

# Never play poker with your surveys.


*Virtual shelf shopping simulation allows respondents to browse a virtual store shelf just like an actual one.*

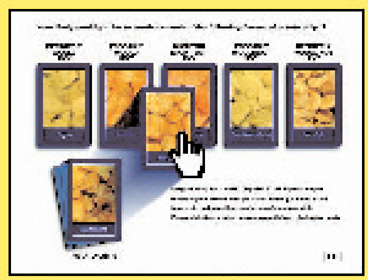

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Table 2

| 11-Point Scale | 10-Point Scale | 7-Point Scale | 5-Point Scale |
|---|---|---|---|
| ? | Top-4 Box | Top-3 Box | Top-2 Box |
| Top-3 Box | Top-3 Box | Top-2 Box | ? |
| Top-2 Box | Top-2 Box | ? | Top Box |

28 percent of the scale points. Table 1 shows the box score distributions for the four scales.

The boxed numbers show that, for example, a top-two box score on a five-point scale accounts for approximately the same proportion of the scale as a top-three box score on a seven-point scale, or top-four box score on a 10-point scale (approximately 40 percent). Hence, when data using these scales are to be compared, the relevant number of top boxes could be used. More generally, Table 2 provides (approximate) conversions for boxed scores among the four scales. A "?" indicates that a simple conversion is not available.

Scale equivalence lets us compare results from different scales without altering the data in any way. While this may be sufficient in some cases it is clearly a limited solution, since only boxed scores can be dealt with in this manner.

• *Re-scaling*

The basic idea in re-scaling is to alter the scale in such a way that the two scales in question can be directly compared. Such an alteration should enable not just boxed-score reporting, but also mean score reporting. It should be noted that re-scaling relates only to modifying the scales for aggregate reporting purposes and not changing data at the individual respondent level.

Re-scaling can be best demonstrated with real data. Toward this end, a split sample experiment was run using a consumer Web panel to study five-point and 10-point scale conversions. In this experiment, respondents were asked to rate how satisfied they were with their primary bank. A random half of the respondents answered the question using five-point scale, and the remaining half answered on a 10-point scale. Such a split sample design is useful for one main reason: once each scale is converted, it can be compared with the actual scale from the other half to investigate the effects of the conversion.

A total of 223 respondents used a 1-10 scale anchored by Very Dissatisfied and Very Satisfied, while a total of 197 respondents used a 1-5 scale again anchored by Very Dissatisfied and Very Satisfied. Converting the 10-point scale to a new five-point scale is straightforward, since two scale points at a time can be compressed into one. So for example, ratings of 10 and 9 can be converted to 5, ratings of 8 and 7 can be converted to 4 and so on. When converting from a 10-point scale to a new five-point scale, this seems to be the simplest and most reasonable way of doing it.

Converting the five-point scale to a new 10-point scale is somewhat more complicated because we are going from a situation with less information

Table 3

| | Sample 1 | | Sample 2 | |
|---|---|---|---|---|
| Scale Points | Original 5-point | New 10-point | Original 10-point | New 5-point |
| 10 | | 43% | 31% | |
| 9 | | | 14% | |
| 8 | | 33% | 17% | |
| 7 | | | 16% | |
| 6 | | 20% | 7% | |
| 5 | 43% | | 6% | 45% |
| 4 | 33% | 1% | 5% | 33% |
| 3 | 20% | | 3% | 13% |
| 2 | 1% | 3% | 1% | 8% |
| 1 | 3% | | 1% | 2% |

Table 4

| | Sample 1 | | Sample 2 | |
|---|---|---|---|---|
| | Original 5-point | New 10-point | Original 10-point | New 5-point |
| Mean | 4.12 | 8.24 | 7.80 | 4.10 |
| SD | 0.96 | 1.93 | 2.16 | 1.02 |

to one with more information. One relatively straightforward way to do the conversion is to simply multiply every scale point by two. In this case the resulting new 10-point scale will have only the five (even-numbered) scale points. Both conversions are shown in Table 3 for the data on hand.

Looking at the distribution of the data, a few points can be made:

— When converting to a new five-point scale and then comparing to the original five-point scale in the other half of the sample, it appears that essentially the same distribution is retained.

— When converting to a new 10-point scale, the distribution is choppy since only five scale points have values associated with them.

— However, if we were only concerned about boxed scores, this would not be so bad since those are similar to scores from the original 10-point scale.

Going beyond the distribution of the data, the mean and standard deviation of each scale was also calculated, as shown in Table 4.

Clearly, the mean and standard deviation scores for the five-point scales are very similar, indicating that the conversion from 10-point to five-point is successful. But converting from the five-point to the new "10-point" scale appears to be overestimating the mean (8.24 compared to 7.80) and underestimating the standard deviation (1.93 to 2.16). The mean is being overestimated because, for every two scale points, we are using only the higher of the two, i.e., between 10 and 9, only 10 is being used. Similarly since only half the scale points are being used, the standard deviation is being underestimated.

• *Alternative re-scaling method*

Rather than simply multiplying each scale point by two to convert a five-point scale to a new 10-point scale, we could take a more complicated approach. In this method, data from each scale point would be allocated to two scale points in proportion. For example, the 43 percent of the respondents who gave a 5 on the original five-point scale will be distributed between the 10 and 9 scale points of the new 10-point scale.

On what basis would the proportional distribution be made? Randomly assigning half the respondents to 10 and half to 9 would make sense if no other information were available. But other information is available in the form of the original 10-point scale in the other half of the sample. Does it make sense to use this information?

It does, if we can make the assumption that people who gave a particular rating on a five-point scale will stay around that part of the scale, even if they had been presented with a 10-point scale. That is, if someone gave a 5 on a five-point scale the assumption is that that person most likely would have given a 10 or 9 on a 10-point scale. Similarly a 4 would be either an 8 or 7 on the 10-point scale. Of course, it is possible that a person who gave a 4 on a 5-point scale could give a 9 on a 10-point scale, but the results wouldn't change dramatically because of that.

Table 5 shows the original tables, with the new 10-point scale calculated using the proportional re-distribution method. Thus for example, the 43 percent who gave a 5 on the original five-point scale have now been split such that 30 percent have a 10 rating and 13 percent have a 9 rating on the

Table 5

| | Sample 1 | | Sample 2 | |
|---|---|---|---|---|
| Scale Points | Original 5-point | New 10-point | Original 10-point | New 5-point |
| 10 | | 30% | 31% | |
| 9 | | 13% | 14% | |
| 8 | | 17% | 17% | |
| 7 | | 16% | 16% | |
| 6 | | 11% | 7% | |
| 5 | 43% | 9% | 6% | 45% |
| 4 | 33% | <0.5% | 5% | 33% |
| 3 | 20% | <0.5% | 3% | 13% |
| 2 | 1% | 2% | 1% | 8% |
| 1 | 3% | 2% | 1% | 2% |

Table 6

| | Sample 1 | | Sample 2 | |
|---|---|---|---|---|
| | Original 5-point | New 10-point | Original 10-point | New 5-point |
| Mean | 4.12 | 7.84 | 7.80 | 4.10 |
| SD | 0.96 | 2.10 | 2.16 | 1.02 |

new 10-point scale.

Both in terms of the distribution and the summary statistics (shown in Table 6), the proportional re-distribution system does a much better job of mimicking the original 10-point scale. Of course, we have aided the process by using the original 10-point scale distribution as the template for redistribution. But if the conversion is used for a tracking study, it would not be a problem since the distributional pattern of the data usually tends to be stable over time.

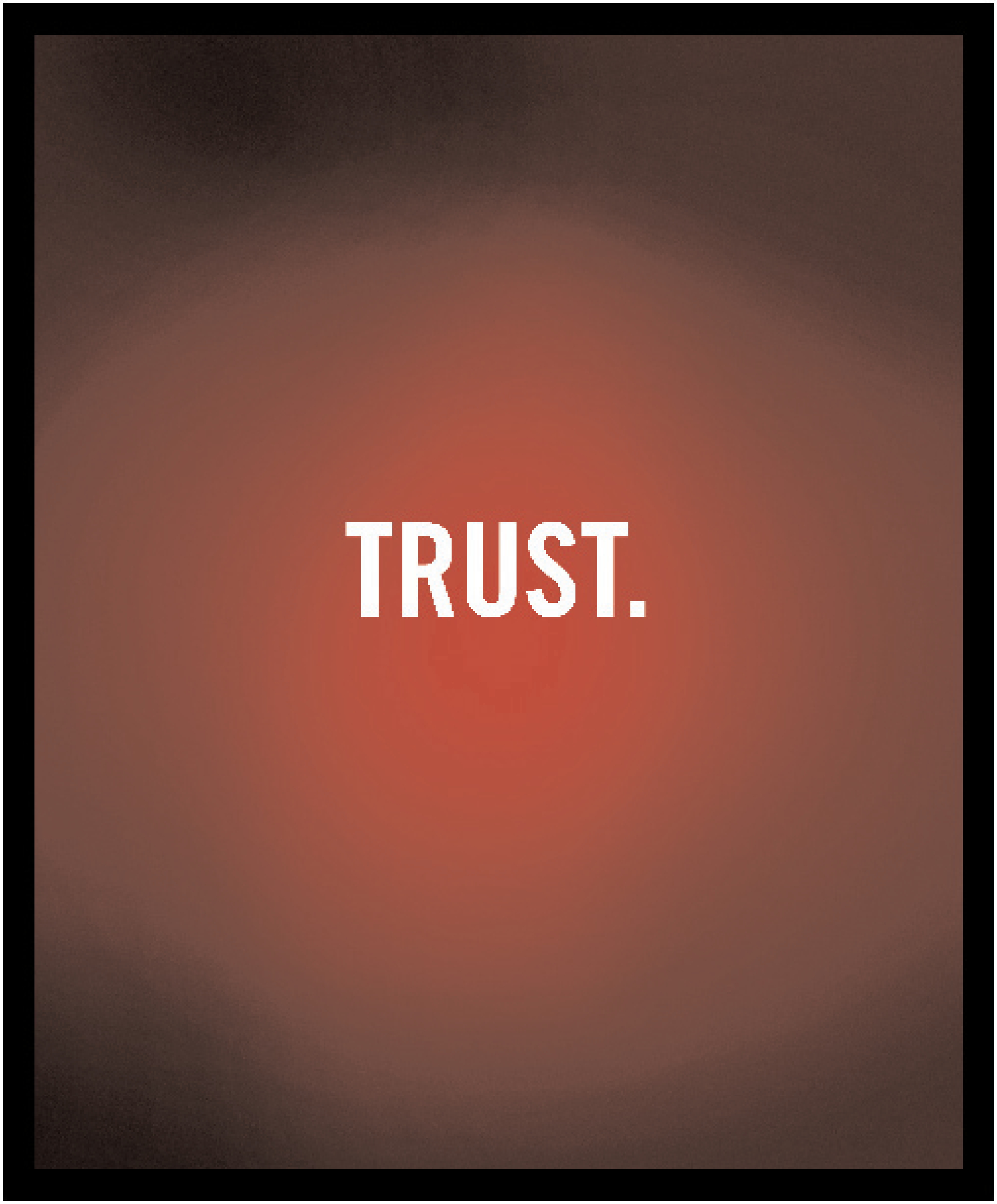
How does one get a scale to use as a template? Consider the case where a tracking study conducted on a five-point scale for many quarters is converted to a 10-point scale starting this quarter. In order to make effective comparisons, data from previous waves would need to be converted to a 10-point scale. For that purpose, the distribution of the 10-point scaled data from the current quarter can be used to proportionally redistribute the previous waves' data. It is not an ideal solution because one has to assume that the same distribution from the current 10-point scale would have appeared in the previous waves if such data had been collected. But there don't seem to be ideal solutions when it comes to scale conversions.

This experiment considered only five-point and 10-point scales. The main conclusion, expectedly, is that reducing scale points is easier than increasing it. If there is a need to increase scale points, then the presence of a template provides a much better solution since it allows the use of proportional re-distribution.

Converting to and from scales that do not differ by integer multipliers (say, five-point to seven-point or seven-point to 10-point) is a more difficult task. When going from a larger scale to a smaller scale it is a bit easier, but even then decisions will have to be made regarding folding of multiple scale points into single scale points on the new scale. For example, when going from a 10-point scale to a seven-point scale, the end points and midpoints may need to be rolled into single scale points. When going from a seven-point scale to a 10-point scale a template would be needed to achieve the proper distributions. Of course, when making such a seven-to-10 conversion one always has the option of just multiplying every scale point by 1.43. But this would be equivalent to multiplying every scale point by two in a five-to-10 conversion and hence the disadvantages mentioned there would apply.

**Difficult task**

Scale conversion in tracking studies is not something that should be undertaken unless absolutely necessary. At times, however, it needs to be done and we as researchers are left with the difficult task of determining a practical course of action. Some conversions are relatively easier than others, but there are really no perfect conversions. It is our hope that this article provides some guidance on how best to achieve conversions while maintaining reasonable trending over time. | Q


TRUST.

By Paul C. Boyd

# A sample size table

There are various formulas for calculating the required sample size for a study. These formulas require knowledge of the variance or proportion in the population and a determination as to the maximum desirable error, as well as the acceptable Type I error risk. For example, sample size formulas were addressed in a July 1999 Quirk's article by Gang Xu ("Estimating sample size for a descriptive study in quantitative research.")

Such formulas are typically presented in such a way as to avoid the issue of population size – they assume that the sample is to be drawn from an infinitely large population. Still, these formulas may appear unnecessarily complex to researchers who have to deal with these issues on only an occasional basis. The question they ask is simple: Isn't there an easier way?

The answer is yes. After all, why bother with formulas when you don't have to? Many researchers prefer a simple table to assist them with the determination of the appropriate sample size(s) for their studies.

It is possible to use one of these formulas to construct a table that suggests the optimal sample size – given a population size, a specific margin of error and a desired confidence interval. This can help researchers avoid the formulas altogether and simplify the process of determining appropriate sample sizes. The accompanying table presents the results of one set of these calculations. This table may easily be used to determine the appropriate sample size for almost any study.

For business and social science research the first column within the table is usually considered acceptable (confidence level = 95 percent, margin of error = ±5 percent). To use the table, simply determine the size of the population from which the sample is to be drawn down the leftmost column (use the next highest value if the exact population size is not listed) and then identify the value in the next column. The value in this column is the sample size that is required to generate a margin of error of ± 5 percent for any population proportion with a 95 percent confidence level. Should more precision be required (i.e., a smaller margin of error) or greater confidence desired (0.99), the other columns of the table should be employed.

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Thus, if you have 5,000 customers and you want to sample a sufficient number to generate a 95 percent confidence interval that predicted the proportion who, say, would be repeat customers within ±2-1/2 percent, you would need responses from a (random) sample of 1,176 of all your customers.

As you can see, using the table is much simpler than employing a formula. (A dynamic version of the table is available for download as an Excel spreadsheet that allows the user to change the margin of error, confidence level and/or the population size. Visit http://research-advisors.com/documents/SampleSize-web.xls.)

Suppose these customers were divided into two subgroups - Group A, consisting of 1,500 customers and Group B consisting of 3,500 - and you wanted to determine the proportions of each. In order to maintain the same levels of confidence and precision (95 percent and ±2-1/2 percent) you would need random samples of 759 from Group A and 1,068 from Group B.

Caution is urged to avoid lower levels of confidence (e.g., 95 percent) or larger margins of error (5 percent) solely for the purpose of minimizing the required sample size. As with all statistical procedures, the confidence level should be determined by the consequences of drawing the wrong conclusion due to sampling error. Likewise, the margin of error should be determined based upon the usefulness of the interval constructed (and remember that the interval width is twice the margin of error).

The formula used for these calculations is shown here (this is the formula used by Krejcie and Morgan in their article "Determining Sample Size for Research Activities"):

All of the sample estimates discussed present figures for the largest possible sample size for the desired level of confidence. Should the proportion of the sample with the desired characteristic be substantially different than 50 percent, then the desired level of accuracy can be established with a smaller sample. However, since you typically can't know what this percentage is until you actually ask a sample, it is wisest to assume that it will be 50 percent and use the listed larger sample size. |Q

**Required Sample Size**

| Population Size | Confidence = 95% | | | | Confidence = 99% | | | |
|---|---|---|---|---|---|---|---|---|
| | Margin of error | | | | Margin of Error | | | |
| | 5.0% | 3.5% | 2.5% | 1.0% | 5.0% | 3.5% | 2.5% | 1.0% |
| 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| 20 | 19 | 20 | 20 | 20 | 19 | 20 | 20 | 20 |
| 30 | 28 | 29 | 29 | 30 | 29 | 29 | 30 | 30 |
| 50 | 44 | 47 | 48 | 50 | 47 | 48 | 49 | 50 |
| 75 | 63 | 69 | 72 | 74 | 67 | 71 | 73 | 75 |
| 100 | 80 | 89 | 94 | 99 | 87 | 93 | 96 | 99 |
| 150 | 108 | 126 | 137 | 148 | 122 | 135 | 142 | 149 |
| 200 | 132 | 160 | 177 | 196 | 154 | 174 | 186 | 198 |
| 250 | 152 | 190 | 215 | 244 | 182 | 211 | 229 | 246 |
| 300 | 169 | 217 | 251 | 291 | 207 | 246 | 270 | 295 |
| 400 | 146 | 265 | 318 | 384 | 250 | 309 | 348 | 391 |
| 500 | 217 | 306 | 377 | 475 | 285 | 365 | 421 | 485 |
| 600 | 234 | 340 | 432 | 565 | 315 | 416 | 490 | 579 |
| 700 | 248 | 370 | 481 | 653 | 341 | 462 | 554 | 672 |
| 800 | 260 | 396 | 526 | 739 | 363 | 503 | 615 | 763 |
| 1,000 | 278 | 440 | 606 | 906 | 399 | 575 | 727 | 943 |
| 1,200 | 291 | 474 | 674 | 1,067 | 427 | 636 | 827 | 1,119 |
| 1,500 | 306 | 515 | 759 | 1,297 | 460 | 712 | 959 | 1,376 |
| 2,000 | 322 | 563 | 869 | 1,655 | 498 | 808 | 1,141 | 1,785 |
| 2,500 | 333 | 597 | 952 | 1,984 | 524 | 879 | 1,288 | 2,173 |
| 3,500 | 346 | 641 | 1,068 | 2,565 | 558 | 977 | 1,510 | 2,890 |
| 5,000 | 357 | 678 | 1,176 | 3,288 | 586 | 1,066 | 1,734 | 3,842 |
| 7,500 | 365 | 710 | 1,275 | 4,211 | 610 | 1,147 | 1,960 | 5,165 |
| 10,000 | 370 | 727 | 1,332 | 4,899 | 622 | 1,193 | 2,098 | 6,239 |
| 25,000 | 378 | 760 | 1,448 | 6,939 | 646 | 1,285 | 2,399 | 9,972 |
| 50,000 | 381 | 772 | 1,491 | 8,056 | 655 | 1,318 | 2,520 | 12,455 |
| 75,000 | 382 | 776 | 1,506 | 8,514 | 658 | 1,330 | 2,563 | 13,583 |
| 100,000 | 383 | 778 | 1,513 | 8,762 | 659 | 1,336 | 2,585 | 14,227 |
| 250,000 | 384 | 782 | 1,527 | 9,248 | 662 | 1,347 | 2,626 | 15,555 |
| 500,000 | 384 | 783 | 1,532 | 9,423 | 663 | 1,350 | 2,640 | 16,055 |
| 1,000,000 | 384 | 783 | 1,534 | 9,512 | 663 | 1,352 | 2,647 | 16,317 |
| 2,500,000 | 384 | 783 | 1,536 | 9,567 | 663 | 1,353 | 2,651 | 16,478 |
| 10,000,000 | 384 | 784 | 1,536 | 9,594 | 663 | 1,354 | 2,653 | 16,560 |
| 100,000,000 | 384 | 784 | 1,537 | 9,603 | 663 | 1,354 | 2,654 | 16,584 |
| 300,000,000 | 384 | 784 | 1,537 | 9,603 | 663 | 1,354 | 2,654 | 16,586 |

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qualitative research

By Hy Mariampolski

# The rabbi

## How to work with - and work around - one type of dominant respondent

There is a special kind of dominant focus group participant that I call the rabbi. They can be of any religion, any color, bearded or clean-shaven, male or female. Rabbis tend to be on the elderly side, though age is not their primary qualification. What distinguishes a rabbi is their unassailable, recognized authority with respect to the subject under discussion.

The views of even very authoritative respondents need to be balanced in group discussions. Rabbis are not infallible. Even in the Jewish tradition, they have no special religious status; any layman may perform sacred rituals. Rabbis are distinguished primarily by their extensive learning and leadership qualities.

Most dominant participants come to group experiences with some degree of insecurity, anxiety or arrogance. Consciously or unconsciously, they view the group discussion as an opportunity to dramatize themselves. Dominants may have pretensions of authority but, in reality, they are just loud, bombastic and boastful. They behave competitively toward moderators and dismissively toward peers. Their potential for spreading dismay and invalidity needs to be tightly contained.

Rabbis are different. They may present themselves as shy and reserved or they can be as overbearing as any other type of dominant participant. What distinguishes them, however, is the behavior of other group participants, who become respectful, deferential, and even obsequious toward a rabbi.

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In the highly technical discussions I often lead among medical specialists and senior corporate executives, rabbis appear without being announced. The most stringent recruitment procedures cannot always control the personalities and inner relationships among participants who arrive for a session.

In a focus group of pediatricians conducted several years ago in New Jersey, their rabbi had just published an important article in a leading medical journal. Group participants – several meeting him for the first time – were eager to hear his opinions before rendering their own. Similarly, in an extended creativity group I conducted with optometrists in Los Angeles, it was not apparent until about midway into the session that the friendly gent to my right had been the teacher of almost every other participant in the group over his career. That could not have been predicted from the participants' wide age distribution; some were about the same age as his, while one was at least 20 years younger.

Rabbis cannot always be identified at the recruitment stage; however, their agreement to participate may sometimes be used by recruiters to entice others to attend market research sessions. In a Connecticut focus group on an important new corporate management initiative, the CEOs, CFOs and COOs in attendance were all eager to hear from the "brand-name" CFO who was the draw for their own participation. They, indeed, were thinking through their own reactions to the new corporate policies being demanded by government authorities and wanted to explore alternatives valid for their own businesses. Like many encounters with a rabbi in the group, the session was less an opportunity to hear various opinions than to observe the process of opinion formulation in vivo.

**Client reactions**

Backroom client reactions can vary widely. Sometimes client observers are as enchanted as everyone else in the front room. They may be tempted to tune out everyone but the superstar, while congratulating the qualitative research consultant and recruiter for obtaining the cooperation of someone with such eminence. In one case, during a Silicon Valley session with telecom programming specialists, the clients called me to the back room to ask whether it would be ethical to offer a job to a group participant whose depth of knowledge and experience, amply demonstrated in the discussion, apparently qualified him for an open senior position with their R&D organization.

Often clients confuse rabbis with conventional dominators and incor-

rectly urge moderators to control or suppress their participation. This can be a very dangerous course to take because other participants may define the moderator's behavior as rude or ignorant. Besides, some attendees may feel that the implicit social contract that impelled their own participation is being violated.

In point of fact, most often, client observers may miss what is going on completely because the rabbi's influence is being exercised subtly through a wink, a raised eyebrow and other facial gestures. Otherwise, participants may be unwilling to assert strong opinions until after the rabbi has spoken. The best way to observe the rabbi's effect is through their reflections in others rather than through anything they do to exercise authority.

Culture may be the source of the roles rabbis are playing. Many cultures maintain strong norms for appropriate authority behaviors in groups. Among Japanese respondents, for example, the most influential person in a focus group may be the quietest person sitting at the table, as I learned several years ago while interviewing the American divisional leadership of a major Japanese bank.

It is also wrong to assume that the rabbi is never vulnerable to challenge. Sometimes, he or she may represent a particular school of thought or practice modality, subject to vociferous objections by those representing alternate points of view. In one of the earliest focus groups I ever conducted, for a textbook publisher during the 1970s, we had attracted a rabbi, an eminent scholar, but had also recruited a dissident who championed a different theoretical position. Despite the adulation of several group members, the rabbi did not have an easy time with the young rebel.

It is advisable to check whether nonconformist viewpoints are present in the group, despite the rabbi's presence, to invite their expression and to validate their importance.

**The rabbi's lessons**

The lesson demonstrated by the rabbi is that, despite our best efforts, we cannot always hermetically seal group discussions from various authority relationships, cultural roles and statuses that are brought into a session from the real world outside the laboratory. Even apparent peers have a natural pecking order, a structure of influence that they will bring to group experiences that moderators are trying to construct. Relations among group members are not always controllable, nor must we persist in struggling to be the ultimate power.

The focus group can be something different - not a controlled discussion in which the information marketers provide is the only critical variable structuring opinions. Instead, the group experience may be a snapshot of an ongoing set of relationships created before the session and persisting well afterwards. What we are witnessing in this context is an actual moment of influence in which ideas are being evaluated, processed, negotiated and compromised.

If a rabbi persistently changes people's minds in a focus group, it is not necessarily because he or she is exhibiting dominating behavior. Instead, we are viewing a pattern that is likely to occur outside the laboratory. In the real world, marketing communications always are filtered and processed by what Malcolm Gladwell's *The Tipping Point* refers to as "mavens" - experts, reference groups and peer influencers who serve as the reality check for what people are hearing. People defer to authority figures in real life; opinions are crafted and evolve through an interactive process in which doubts become certainties and information is turned into knowledge. When this process occurs in a focus group, we are viewing in microcosm an actual instance of opinion formation and this should be welcomed, not discouraged.

**Leverage the rabbi's energy**

How do we make sure that we are mobilizing the rabbi's energy for the good of our group and to maximize the client's learning? Here are some ways for moderators and group leaders to stay ahead of a rabbi:

• Acknowledgment: It is hard to become a rabbi, so they deserve recognition and respect. Mirroring your group's admiration helps you maintain rapport with everyone in the room. After two pediatricians referred to the article by that group's rabbi, I suggested that he spend a few minutes describing its findings to everyone else in the room. This gesture placed the entire group in a situation of equality. Afterwards, I probed whether knowledge about this specialized study would change anyone's prescribing habits and solicited permission to mention that if anyone wanted to continue the discussion with the rabbi, they could take time at the end of the official discussion.

• Leverage the rabbi: Turn the rabbi's presence in the group into an opportunity to extend the client's insights into opinion formation. When it became obvious that participants in the senior executive study referenced above were deferring to the brand-name CFO, with the agreement of my backroom client, we made his opinions the focus of the discussion. "Jim, you're the CFO of the largest company represented here and everyone, especially me, would like to hear what you are doing in response to the new law." We were then able to debrief everyone else in the room about the degree to which their own companies would be likely to make decisions in the same way. This got everybody talking, asking and sharing as peers.

• Humor: Rabbis do not necessarily want to be the only voice heard in the room; they fall - usually reluctantly - into their old roles with respect to other participants. If your background and level of rapport are appropriate, you can defuse the situation with some gentle joking. As a former university professor myself, I was able to put everyone on an even footing in my optometrists group when I said, "What's going on here, haven't we all graduated already? Dr. Johnson, didn't you ever encourage class participation?" Everyone laughed in recognition and from that point onwards, deferring to the rabbi stopped being a problem.

• Projective and enabling techniques: Exercises may be used to overcome the problems of different statuses in the room. All participants are on an equal level when they are reacting to unfamiliar stimuli. It is sometimes challenging to implement projective tools with senior professionals and executives, but it is valuable to use them to overcome the politeness barrier.

**Achieve goals**

Working effectively with participants who stimulate strong feelings within fellow respondents is an issue faced in all kinds of group discussions - not only those involving professionals. In any study, specific individuals may become admired because they are hotter, cooler, better traveled or more informed. Great moderators help to achieve client-focused goals no matter who shows up for the session. | Q

qualitative research

# What's the real story?

By Andrew D. Cutler

**Projective marketing research techniques can uncover the hidden truth**

One of the most important tasks that marketers face is to understand how their customers or potential customers think. By gaining insight into their customers' deeper thought processes, marketers can optimize communications, making them more impactful and relevant. The difficulty of gaining this insight, however, becomes apparent when you consider that, as human beings, we don't always have access to our own cognitive processes. We may recognize our likes and dislikes; however, we may only grasp the reasons behind these on a superficial level. The deeper motives that drive our thoughts and feelings can be, and often are, hidden from our own awareness.

For example, imagine that a researcher, hired by an automobile marketer, asked you which of two brands of automobile you prefer, Ford or Chevy. Let's assume, for the sake of argument, that you respond, "I prefer Ford." The researcher may follow up and ask "Why?"

At this point, you are being put on the spot. You are in a position where you must come up with a rational explanation for your previous response. To make matters worse, you are expected to provide this explanation quickly. The interviewer is probably not going to wait 15 minutes as you mull over why you prefer Ford. So, you come up with the first one or two things that enter your consciousness. "Well, I think they build better-looking cars. And they last longer."

Sounds good, right? Well, the problem is, your response is essentially your attempt to justify your reason for stating that you prefer Ford. In reality, your preference for Ford may stem from reasons that you are not (at least immediately) aware of. Perhaps as a child you had a memorable road trip in a Ford. Perhaps an advertising campaign for Ford has boosted Ford's image in your mind. Perhaps your neighbor with the bigger house and the swimming pool drives a Ford. There are several possible factors - many of which you may be completely unaware of - that can contribute to your having said, "I prefer Ford."

**The real reasons**

So how can a marketer identify these factors - the "real" reasons why you express a preference? One of the most effective ways to do this is to conduct projective techniques.

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Projective techniques involve the use of one concept to discuss another. Clinical psychologists have been using projective techniques for many years. One of the most famous projective techniques, the Rorschach test, became widespread in the early 20th century among psychologists who sought to assess their patients' emotional and intellectual function. Even today, the majority of psychologists use the Rorschach test diagnostically, and it is routinely submitted as evidence in child custody cases, criminal sentencing and emotional damage lawsuits.

During the Rorschach test, individuals look at 10 abstract inkblots, and provide their interpretations of what is being depicted. The theory behind the test is that the viewer projects his or her feelings and wishes onto the inkblot stimulus, and thereby reveals his or her personality to the therapist.

Individuals can have widely disparate interpretations of the same inkblot. One person may see depictions of gruesome acts of violence, while another may perceive peaceful, harmonious imagery within the same visual stimulus. Consistent patterns of inkblot interpretation can tell psychologists a lot about the viewer's psychological makeup.

Other projective techniques are commonly used to help marketers better understand their customers. Moreover, as qualitative marketing research matures, these techniques are becoming more sophisticated. By drawing from the right side of the brain (the creative, emotional side), projective techniques can help respondents better access and articulate how they feel about a brand, product or service. The researcher, in turn, can understand an individual's responses and reactions on a deeper level than might otherwise be possible.

When conducted properly, projective techniques allow the researcher to circumvent the internal censoring that normally blocks individuals' unconscious feelings, needs and motivations. The real reasons why people react as they do - the emotional end-benefits - can be identified.

For example, when asked directly how they feel about a brand, even the most well-meaning may give answers that do not express their real opinions. A variety of factors may lead respondents to do this, such as:

• a wish to provide the answers that they think the interviewer wants them to provide;

• a desire to save face by expressing opinions that are consistent with those of the other interviewees;

• an inability to access their own true feelings and thoughts.

Thoughtfully-executed projective techniques can help researchers obtain data that are more genuine and thus more predictive of respondents' actual behavior in the marketplace. Projective techniques can also engage respondents more fully than traditional lines of questioning. And, as an added benefit, those in the back room often find projective techniques to be more stimulating than the usual rote interview techniques.

The following are some (but by no means all) of the projective techniques that qualitative researchers employ when they conduct exploratory research: analogies; personification; collaging; drawing exercises; visualization.

Analogies

The use of analogies - that is, drawing a comparison between two items in terms of their similarities - can be enlightening when researching brand perceptions. For example, a researcher investigating consumers' perceptions of Ford automobiles may ask:

"I'm going to read you a list of stores, and then I'd like you to tell me which of these is most similar to Ford cars. If possible, try to give the first answer that comes to mind. The stores are: Neiman Marcus, Wal-Mart, Macy's, JC Penney, Kmart, Nordstrom, Target, and Lord & Taylor."

As a follow-up, the researcher would then ask,

"What is it about [Store X] that is

most similar to Ford cars? How are the qualities of Ford cars similar to this store?"

This line of questioning induces the respondent to talk (indirectly) about his or her perceptions of Ford cars.

The use of analogies in this instance is not to determine which store(s) people associate with Ford cars but rather to get people to talk about their perceptions of Ford cars in ways they might otherwise be unable to do. Because perceptions of stores vary, some respondents may choose Store A, and some may choose Store B. The researcher should be less concerned with identifying the store(s) respondents tend to select and more concerned with determining the reasons respondents give for the choices they make. Person A may select a different store from Person B, but that is of little significance if these two individuals share similar perceptions of the stores they chose, and hence of the Ford brand.

<u>Personification</u>

A technique similar to analogies, personification involves drawing a comparison between a product and a person. To continue with the example from above, the researcher might say,

"Think about the Ford brand, and imagine it were a person. Who would this brand be? How would you describe this person? What personality characteristics would this person have? In what ways do you associate this person with the brand?"

During this type of exercise, the researcher should encourage the participant to discuss such things as the person's values, beliefs, goals, lifestyle, appearance, age, occupation, socioeconomic status, hobbies, interests, etc. All of these can speak volumes about the respondent's attitudes towards the brand, and can go significantly beyond the output of standard lines of questioning.

Another, more advanced technique is to have respondents describe hypothetical social interactions between different brands, as in the following example:

"I'd like you to imagine Ford and other brands of automobiles as people who are at a party. How are they interacting? Who is talking with whom? What are they talking about? Who is at the center of attention at the party? Who is being a wallflower? How is each brand dressed?"

This approach can be especially useful for gaining an understanding of how people view the various competitors in the marketplace in relation to each other. Again, the more detail that respondents can provide about the scenario they are envisioning, the more illuminating this exercise will be. For example, let's imagine that the researcher asks what each guest at this party is drinking, and the respondent says Ford is drinking a particular brand of beer. Probing as to what makes this Ford's drink of choice can provide useful insights into how the respondent views Ford cars.

A similar exercise involves having respondents imagine all of the brands in the category as being part of a family – literally:

"I'd like you to envision the different brands of automobiles as family members at a picnic. Tell me when you have a vivid image in your mind. Okay, good. Now, who are the parents? How do they get along with each other? Who are the children? Are they rebellious or well behaved? Are there grandparents at this picnic? Aunts and uncles? Distant relatives? If so, which brands are they?"

The most useful feedback from this type of exercise is often in the explanations that respondents give for their answers. For example, while it may not be especially illuminating to learn that a respondent identifies Ford and Chevrolet as the "parents," the reasons that a respondent cites for identifying these brands as the parents can be highly informative.

Collaging

Collaging is a well-known projective technique and one that can provide genuine insights when used appropriately. Typically, the researcher/moderator will bring a collection of newspapers or magazines on issues not related to the topic to the research session. (Experienced moderators have found that it is often best to bring in an array of periodicals – e.g., newsweeklies, home and garden magazine, and automotive publications – so that participants are more likely to be familiar with at least one of them). The researcher will ask respondents to create a collage that captures their feelings about and perceptions of a product, brand, relationship, etc.

Continuing the example above, the researcher might ask respondents to create a collage that expresses how they view Ford cars. The researcher may then probe along the following lines:

"That's an interesting collage, Steve. Talk to me please about the various elements in the collage you created. What led you to include each of these elements in the collage? How do they relate to Ford automobiles?"

In a related, somewhat less involved approach, the moderator provides a deck of visual images and has each respondent select one or more pictures from the deck that best capture their views of the brand. If this technique is chosen, it is important to keep in mind that what is in the deck makes a difference. The pictures can be mixed or matched, related by category or heterogeneous, but should all be of consistent quality. Otherwise, respondents will tend to gravitate towards the better-quality images, thereby diluting the usefulness of this exercise. The follow-up questioning is similar to the follow-up described for collaging exercises: namely, asking respondents to discuss why they selected particular images, and how these images relate to the brand.

Drawing exercises

Often, it can be instructive to learn about what type of person respondents envision as the typical user of the brand, product, service, etc. One of the ways to understand this is to ask respondents to describe this person. However, a more productive route can be to ask respondents to develop a detailed picture of this individual – first mentally and then on paper. The following instructions illustrate this technique:

"I'd like you to think about who comes to mind when you think about the typical person who buys Ford automobiles. As you think about this person, please try to develop as detailed an image as possible in your mind.

"Now, please draw this person. It doesn't matter whether you have artistic abilities or not: just do your best to illustrate the person you have in mind. Again, please try to be as detailed as possible; try to include such things as the person's clothing, hairstyle, jewelry (if they are wearing any), etc. Also, try to illustrate the context or setting where this person may typically be found. Also, feel free to include a cartoon balloon showing what this person is likely to be saying. And finally, please give the person a name."

To follow up, the researcher should ask the respondent to describe their drawing in as much detail as possible. It is important that the moderator keep the discussion on track by exploring how each element of the drawing resonates with the respondent's thoughts about the brand. For example, if the respondent draws a man with a diamond ring on his pinkie, the interviewer should probe on the significance of the ring and how it relates to the brand.

Visualization

This is a more involved projective technique that can consume a lot of time and may not be appropriate for all respondent types. However, it can also provide rich insights into thoughts and feelings that may otherwise be inaccessible. Typically, the researcher will ask respondents to close their eyes and relax as much as possible (taking several deep breaths if necessary), and to imagine themselves in a world that is soothing and peaceful. The participants are told to imagine themselves roaming around this world until they feel totally immersed in this fantasyland. Then, each participant is asked to imagine encountering a door that is marked with the name of the brand or product in question. The participant is told to go through this door and to pay attention to what s/he sees, hears, smells, etc., in the realm behind this door - in as much detail as possible.

Alternatively, the researcher may ask the respondent to imagine the brand as a person who approaches the respondent in this realm. The researcher will ask for as much information as possible about this "brand-person" (i.e., what does the person look like, say, do, etc.?).

Whichever visualization approach is chosen, in a focus group setting it is generally best to have respondents write down a detailed summary of their mental imagery and then share what they've written with other members of the group. Next, the moderator will encourage the group to discuss the imagery and what it means.

**Start simple**

Each of the techniques described above can help researchers develop a deeper understanding of their customers. If multiple techniques are to be employed within a single research session, it may behoove the researcher to initiate the session with a relatively simple projective technique and to bring out the more complex methods later on.

Regardless of the projective technique that is chosen, the researcher must create an environment conducive to creative thought. That is, participants need to feel relaxed and comfortable, and the setting itself must be open and non-judgmental. Respondents should understand that there are no right or wrong answers and that the point of the exercise is to freely share with the researcher (and the group, if it's a focus group) the thoughts and images that come to mind. By saying something like "This is meant to be FUN. It's NOT a test. So relax and let whatever ideas you have - no matter how unusual or crazy they may seem - just flow!" the researcher will help to create the sort of environment in which participants can feel comfortable not only with letting their imaginations take hold, but also with allowing others to share in the experience. A good researcher will make these brain exercises enjoyable for all respondents involved.

If the moderator is conducting a focus group (as opposed to one-on-one interviews), projective techniques will be more effective if he or she can first create a sense of kinship among the participants. That is, if the researcher can transform the individuals in attendance from an "aggregate" to a "group," these participants will be more willing to share their thoughts and feelings with the others in attendance.

It is worth noting that, from time to time, the researcher will encounter a respondent who has difficulty with these kinds of tasks, regardless of how comfortable they are made to feel. The researcher should not attempt to pressure such a respondent into providing useful feedback, as this will simply backfire. Instead, it is advisable to back off from asking the respondent to come up with answers to projective-type questions. If it is a one-on-one interview, more traditional lines of inquiry should be pursued. If it is a focus group, the researcher should let the other participants continue with the exercise. Later in the interview or focus group session, the researcher can make another attempt to engage the respondent, as it is possible (though by no means inevitable) that the respondent will be able to more productively engage in these exercises after more time has elapsed.

Another type of respondent that one will occasionally come across when conducting projective techniques is the smart aleck. Such a respondent is generally someone who views projective techniques (and perhaps even market research in general) as silly or worthless and who decides to express his/her disdain by giving answers in a hostile, careless or similarly unproductive fashion. Faced with situation, the moderator should move on to the next respondent and refocus the group on the task at hand. It may be necessary to remove the antagonistic participant from the research session.

**Time may be needed**

Once fieldwork is completed, it is important for the researcher to let the data gel. Resist the temptation to immediately make sense of the data that have been collected. Instead, recognize that it may take time for the implications of the findings to become apparent. The initial encounter with the data from projective techniques can be like viewing a painting for the first time: meaning is often not apparent at first blush. Paradoxically, the better job the researcher does, the more "masked" the responses will be. Respondents will be tapping into deeper emotional/motivational reservoirs, and these may manifest themselves in ways that defy traditional analysis.

Once sufficient time has elapsed, the researcher should look for and report commonalities in the responses. Identify recurrent themes or motifs. When analyzing the data, consider your own free-associative responses to it. Soliciting reactions from colleagues to the data can often help to illuminate the meaning of the findings. Ultimately, the researcher needs to exercise caution when offering his or her interpretations of the data to the client, as these interpretations are inherently subjective.

To help the report reader gain better insight into what respondents articulated and created, it is usually best to include extensive examples of direct-from-respondent output, in either the body or appendix of the report. Including verbatims, scans of drawings and collages, and other output from the research sessions will add depth to the report and allow the reader to come to his or her own conclusions about respondents' attitudes and perceptions.

**Profound understanding**

Projective techniques are not a one-size-fits-all research solution. These techniques often take time to implement and are generally best suited to exploratory research that has a heavily perceptual component. Due to time limitations and the benefits that can accrue from group discussion, projective techniques are often (but not always) more useful in the context of focus groups than in one-on-one interviews. There are many types of research projects for which straightforward, direct questioning is going to provide more useful data. For instance, to understand the treatment algorithms that physicians use for patients with a specific medical disorder, or to assess which advertising concepts are more powerful, standard qualitative research is often more efficient and appropriate.

A wise researcher will know when to employ a projective technique – and will know which particular technique is going to produce the most useful output. Moreover, proper execution of these techniques is essential: if sloppily executed, projective techniques can be a waste of everybody's time and money. With these caveats in mind, however, artfully executed projective techniques can lead to a profound understanding of target audiences' perceptions and motivations and can provide considerably greater insight and clarity than traditional qualitative research. | Q

qualitative research

# If Freud had been a market researcher...

By Patricia Sauerbrey

Freud and market research? No, this is not another attempt to honor Freud's 150th birthday anniversary by associating him with market research. Freudian thought is not only vivid in modern psychotherapy, but also in our everyday lives. And we surely don't want to talk here about the Oedipus complex, the superego or the id.

In this article, I will discuss a methodology which seeks to account for the tremendous influence of the unconscious on the practice of market research.

Where is our unconscious while eating, shopping or cleaning - in other words, consuming? How does it affect our everyday actions and how can we as researchers benefit from it?

The emergence of qualitative market research certainly has helped dig deeper than multiple-choice questionnaires, but we must ask ourselves if the qualitative methodology we apply really looks behind the façade of the consumer. Some focus groups or so called in-depth interviews don't go much deeper than an online survey. It's unfortunately not enough to ask an open question to a couple of people hoping they will reveal their deepest motives for doing things.

Sometimes we forget that there are more characters in play than just our well-selected respondents. It's ourselves, our clients and our well-selected interview or focus group attendees. And to make it just a little more complicated, the respondents are not the only ones with an unconscious.

Does that sound a little like group therapy? Well, actually it's pretty close.

## Morphological market and media research

Morphological market and media research provides the theoretical background to reveal the role of the unconscious in all the different players within this system.

Morphology is the study of a form or structure and its metamorphoses. Applied to market and media research it provides a scientific approach to analyzing the people and artifacts of everyday culture. Originating in Europe, morphological market and media research is being increasingly applied to international markets in cross-cultural and foreign studies.

It turns some traditional research beliefs upside down and offers a methodology that avails itself of a toolbox appropriate to the object of study: everyday life.

The following provides an introduction to the morphological way of

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thinking and conducting research.

*1. Serve the research interest and then the client*

Most qualitative research methodologies aim to uncover the unconscious, but usually apply the unconscious only to the respondents. Again, we are in play, the client is in play, as are the "objects of study" (the new product concept, the ad mock-up, etc.) and the target group of consumers. Unfortunately, all of this is not organized in drawers we can just pull open.

Usually, the fairly general written briefing from our client asks us to identify the target group, figure out which hidden drivers should be considered for the marketing campaign or what psychological differences characterize the sub-targets. But we usually get the true sense of what the client is looking for in our first meeting.

An example: A marketing manager is looking for research that will support a higher budget to target a freshly discovered hip-and-trendy consumer group; the client's internal researcher has to explain why the last online survey showed that the target is extremely extroverted and interested in cultural activities; and the new advertising V.P. would like to give the ad campaign his fingerprint. We are right in the middle of all of this.

We want to make the clients happy, of course. Consciously - and unconsciously. And this is what we need to pay attention to. The unconscious part of our desire to please the client might influence us so much that we become blind to the "true" results. It might hold us back from finding and presenting provocative results that might feel threatening and uncomfortable to the client. However, these findings might reflect the reality better and provide the client with more actionable insights. Morphological research provides tools to overcome this dilemma.

*2. Reveal the interviewee in yourself*

When I was first introduced to market research I was asked to put myself aside, be unaffected by my prejudices and focus on what the respondent had to say. Of course, this is not completely wrong, but it misses a crucial point. One's own opinions, prejudices and experiences are influencing factors that will impact the findings of a study. If we don't make ourselves aware of these effects but try to ignore them as best we can, they will have uncontrollable impacts. We will be unable to distinguish between where we ourselves and where our interview or focus group attendees are involved.

To unmask your unconscious and understand your prejudices, sit down and take time to write out whatever comes to your mind regarding the study and the object of study (the new product, the new campaign, the target group, but also the client and what you feel you are supposed to reveal). Approach it from your personal angle: Describe your everyday life experiences with the object of study, how you first got to know it,

who introduced you to it, what it changed, what you like and what you dislike. Imagine who might like it, who might dislike it and where you position yourself within this field. Ask yourself the same questions about the client. Don't stop your thoughts if something comes to your mind that you can't connect right away with the object of study. Allow for more questions coming up and don't finish before you feel that you covered everything. Don't think about structure and readability, let it flow and don't set yourself any borders. Be as honest as you expect your respondents to be. Don't stop when it becomes embarrassing – usually you touched something relevant when it starts getting uncomfortable. Squeeze yourself out like you are going to squeeze out your in-depth interview or focus group attendees. This might take 10 or more pages or a couple of hours – well-invested time that will facilitate the next steps tremendously.

What you have created is an experience journal, which every morphological market and media researcher writes upfront when conducting a study. You will be surprised what is going on in your head as soon as you take time to really experience your relationship to the object of study or the study itself. A helpful side effect of this procedure is that you yourself have to reveal apparently senseless, embarrassing and strange thoughts, which helps you support your interviewees or focus group attendees to report such thoughts in your upcoming sessions.

To write and to analyze an experience journal requires a lot of practice. A morphological market and media researcher trains herself in discussion with other morphologists. A couple of researchers write experience journals regarding the same topic and thereby understand which aspects they might have missed and which questions others might have when reading their thoughts. They get to know the similarities and different appearances of the same drivers or underlying principles.

*3. The morphological in-depth interview/focus group*

Make use of the treasures within the people in front of you. Make sure what you do could not be replaced by a questionnaire with open-ended questions. Dig deeper.

Start from scratch and facilitate free-associating. Ask the interviewee/group to describe what comes to their minds when thinking about the object of study. React flexibly, ask further and build meaning out of the pieces your subjects throw at you. Stay on track and ask yourself what they tell you about the object of study. Relate and ask further if you don't see the connections.

Prepare yourself with a moderation/interview guide with your list of questions, so that you can jump to other questions if you feel the last one is answered. Apply the same method as you used for your experience journal. Remember what


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Most people are not used to free association. They expect to answer straight questions with short, rational answers. Encourage them to mention everything that comes to their mind, no matter how seemingly unrelated it might be. Give examples. This might sound fairly general, but it is the opposite: be as individual as possible. Work with provocation, repetition, pauses, associations, images and everyday life comparisons. Use a variety of communication techniques. Try, learn and practice to get a feeling for what works best for each person. Everybody is different: Some interviewees need more guidance, some like to take the lead; others might be stubborn and need you to facilitate their descriptions. See your interviewee as your partner in this research journey.

*4. Describe, describe, describe*

The interviews or focus groups are followed by written interview or focus group descriptions. The interview or focus group in all its appearances - words, gestures, facial expressions, atmosphere, interactions - gets described, because everything that happens in the context of the interview or focus group might show an aspect of the object of study. As in our everyday lives, often people's gestures and facial expressions say more than words can. And sometimes we get a sense of things without even talking about them. We might express discomfort without saying anything, act bored while being very talkative or smile while feeling attacked. Just like our interviewees.

Our job is to reveal these contradictions, make sense out of them and understand the true meaning of what is going on. Ask yourself: What is so threatening about the topic that something needs to be hidden? When do you feel disconnections between words, body language and facial expressions? What makes them appear? What makes them disappear? Put in words what you discover. Describe misfits, observations and surprising discoveries; also describe your hypotheses about hidden meanings.

Ideally, five to eight interviewers are involved in a single study, each conducting independent interviews resulting in a total of about 30 to 50 interviews. The interview descriptions are then shared amongst all interviewers. Subsequently, batches of five to 10 interviews are summarized to explain recurring principles. The final presentation is a further summary of these summaries, making sure to provide the full picture and the overall understanding. While a single interview description is focused on the individual findings related to the personal experience of the interviewee, the final presentation reveals and illustrates the mechanisms or underlying principles in the sample's mind and extrapolates to the target group's mind.

*5. Analyze this*

Life is contradictory, as are our needs, thoughts and emotions. Most of our everyday life experiences represent a mixture of sensations. What we think and feel does not follow rules of structure and reason. Attraction and repulsion in all their nuances are usually facets of the whole picture.

An example: The consumption of a candy bar might relieve us from current stress, provide us with new energy and make us feel better, but on the other hand trigger worries about our figure and make us feel weak and childish. Not to mention the numerous sensations added to the picture by a specific brand and its image and positioning. If even the decision to eat a specific candy bar is not a straightforward one, think about the multidimensionality of media consumption, advertising impact and our mindset when we go shopping!

To not get lost in these manifold relationships with products, ads and media, morphological market and media research provides a framework that defines what exactly to look for. Morphological market and media research identifies six polar dimensions of the human mind, usually illustrated as corners of a hexagon. These dimensions represent movements or desires of the psyche involved in everything a person is dealing with, from toothpaste purchase to relationship management.

Without getting into too much detail, let me give an example of two competing dimensions within this framework: the dimension "acquirement" characterizes the mind's tendency to try to keep something or to stick with the current. On the other hand, "alteration" describes the human desire to change, to do something different and alter the current status. Both dimensions are involved in everything we do and represent an underlying principle that expresses itself in multiple ways depending on what we are dealing with.

This has given you a quick glimpse of the theoretical background. Morphology not only defines these dimensions in detail but also provides an understanding of their relationships and the overall functioning of the human mind.

A morphological researcher acquaints herself with these principles through theoretical background studies as well as individual case studies to be able to flesh out the six dimensions of each specific study.

*6. The mosaic and the full story*

The end result of this process will be a vivid description of the psychological mechanisms taking place when people deal with the object of study. The morphological dimensions described above become animated through illustrative words, pictures and quotes from the interviews or focus groups. This is to provide the client with a feeling for its target group and the target group's desires, mindset and relationship with the product, brand, ad, etc.

Don't set limitations. Ask yourself what your audience or the reader needs to know to get the best sense of the target group. Create the mosaic, the whole picture out of the pieces you discovered. Reveal the psychological impact of the object of study. Ask yourself: What helped you understand? What made you grasp the relationships? What questions need to be answered? Which actionable implications can you provide?

Go back to the beginning and ask yourself what your client is looking for. Provide insights answering her questions, but answer also those questions you experienced while conducting the study. Make yourself aware of results that might attack the client's perspective and call out the beneficial aspect of provocative results. Keep in mind what the client wants to do with the results. Provide her with a challenging and multidimensional story containing focused insights into the psychological complexities surrounding the object of study.

**The rules of the unconscious**

A methodology that claims to uncover the unconscious needs to follow the rules of the unconscious. Direct questions may provoke rationalizations and reasonable answers, while associations, metaphors and questions can reveal hidden drivers of actions like product or media consumption. Morphological market and media research provides the framework to unmask these hidden treasures in the consumer's mind as well as the minds of the client and researcher. | Q

qualitative research

# The name game

## Using qualitative research to help name new products

By Myra Summers

In a world where time-starved consumers refuse to read lengthy or complex marketing messages, media budgets constantly fluctuate and companies have limited control over how retailers display their product, its name is among a brand's strongest currency.

Qualitative research is an effective tool in helping companies choose names. It provides the opportunity to understand the associations that names evoke with consumers, evaluate how well names reflect key attributes and benefits of the product, assess appropriateness for the product category, identify potential pronunciation and linguistics issues, and help narrow a list of names to a manageable number prior to proceeding to quantitative research.

**Guiding principles**

The following guiding principles help the name research process go more smoothly - and keep us focused on what we are there to learn.

Usually, a plethora of names has been generated in ideation sessions with clients, specialists in name ideation, and/or other members of the brand team. Consumers are also sometimes involved in ideation of names. However, consumers seem to provide the most value in areas that are related to, but independent of, the actual name generation, i.e., providing insight into a product category, identifying needs gaps, and later, understanding reactions to and associations with names.

The quantity of names taken to initial qualitative research should be limited to about 20. Twenty or so names give respondents a variety of choices without being overwhelming. After the list of names has been narrowed somewhat, more in-depth research can be conducted for the strongest contenders, e.g., four to five names.

Ideally, prior to their being exposed in research, the names have been run through a preliminary trademark search. If no initial trademark search is done, names that rise to the top in qualitative research are often later found to be unavailable.

The research provider needs to fully understand the communication objective for the name, and the relative importance clients place on the various product attributes, features or benefits. This information should be translated to a written concept statement that will be presented early in the research discussion, to help respondents understand the essence of the product being named. Notably, the communication goal

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is not always to convey a functional benefit. For example, in the liquor and wine industries, names often refer to imaginary distilleries, vineyards or character stories (Jim Beam, Jack Daniel's) with the primary objective being to create fanciful or romantic imagery.

The initial appeal of a name, i.e., how well respondents "like" the name when they first see it, is not always a good indicator of success. Who would have predicted the long-term success of brands with names such as Zagnuts, Tang, Twix or 7UP based solely on asking respondents if they "like" these names? The driving quest, beyond understanding if a name is likeable, is to determine its ability to reflect the product's defining attributes, features or benefits. Names that seem unfamiliar or unusual can generate resistance early on but may become memorable and differentiating as consumers begin to embrace them.

• *Pronunciation or linguistics issues*

Qualitative research provides an excellent venue for identifying potential pronunciation or linguistics issues. Ask respondents to pronounce the name first - prior to its being articulated "correctly" by the moderator. This allows us to assess if the name is likely to be pronounced or read as intended, or if respondents seem to stumble over a name.

Having respondents verbalize names unaided helps convey reactions to the feel and sound of the name overall, as well as to its individual parts. For example, if most of a name's consonants sound harsh, the name would likely be a poor choice for baby wipes, but possibly a contender for a household cleaner. In categories such as candy and snacks, the winning name may simply be the one that sounds most amusing or is just fun to say.

Research among adult (25+) male liquor drinkers underscores the importance of how consumers perceive a name to "sound." A clever drink name appears to provide a badge for those who order it. Men are more likely to embrace names that sound hip or masculine when abbreviated or called out, e.g., Jack and Coke, 7 and 7. Conversely, men are reluctant to order a drink if unsure how to pronounce the name, or if they think it sounds feminine.

Keep in mind that research findings can vary by geographical locale. Conducting research in multiple parts of the country, e.g., the South and Northeast, can alert us to regional differences in pronunciation. Regional dialects may result in the emphasis being placed on a different syllable, or a name simply sounding other than anticipated.

Another consideration is how names will test (pronunciation, interpretation) among the rapidly expanding Hispanic and Asian populations in the U.S.

• *How many names do we test?*

If the intent of the research is to narrow the list of names, several can be presented, i.e., 20 or so. While testing a large quantity of names will provide only minimum input on each, learning should be sufficient to eliminate names that are consistently disliked or otherwise appear problematic. Even with this large quantity of names, qualitative research can garner general reactions as well as touch on fit with the product concept and key product attributes.

A shorter list of names, i.e., four or five, enables a more in-depth evaluation of each. With more time to spend on fewer names, findings provide a better understanding of the breadth of each name's associations, fit with key product attributes and benefits, differentiating nuances among the names, and subsequently, the confidence that comes from thoroughly fleshing out a group of strong contenders.

• *Exercises for narrowing the list*

If working with lots of names, exercises to narrow the list should be fairly direct and straightforward. Save the more in-depth techniques for evaluating fewer names. Some examples of techniques that can be used to narrow a long list are described below.

Use a short questionnaire with a five-point agreement scale (strongly agree to strongly disagree), and have respondents rate each name on factors or attributes that clients consider key to the product being named. (If a numerical scale sounds too "quantitative" for you, simply use the words, e.g., strongly agree, somewhat agree, etc.) Factors being rated may include product features, attributes, personality descriptors, etc.

This technique was used in research with a manufacturer of OTC sleeping aids. The brand team had the challenge of appealing to sleep-deprived consumers' need for a good night's sleep, without inadvertently suggesting a product is so strong it may result in dependency. The attribute-rating questionnaire helped evaluate to what degree respondents think each name suggests efficacy, superiority, something "for me," safe, etc.

Another comparative approach has respondents evaluate several names on polar opposites, e.g., expensive versus inexpensive, hard versus soft, sophisticated versus down-to-earth, with the objective being to determine which name best reflects the intended brand personality and/or attributes.

Similarly, respondents can be given a matrix or grid containing several names and asked to choose the one name that best fits or describes a desired product attribute, feature or benefit.

• *Going deeper*

Testing a smaller number of names allows time for implementation of an array of metaphorical (also often referred to as projective) techniques and other involving exercises. Using a variety of exercises - in combination with a deeper level of questioning - results in a fuller understanding of where a name can potentially take the brand. The following are examples of some techniques that work well when evaluating a shorter list of names, i.e., four or five.

A volume of information can be gained early on by having respondents participate in a word association exercise, where they simply share associations that each name brings to mind. Associations provide insight into fit with the overall product concept and personality, product expectations, emotional triggers, etc.

A matching game captures how well names convey their communication objectives. Provide respondents a list of names and a separate list of product descriptions. Have respondents match each name with the description they think best matches the name. An alternative is to use a Velcro board and make the matching a group versus individual activity.

Try this visual ladder exercise to help understand the degree of perceived differences and preferences among names. Give each respondent an image of a ladder with 20 rungs. Each rung is assigned a point value from 1 to 20, with 20 being the highest score. Respondents are asked to position the names along the rungs, e.g., place the name considered the best choice on a higher rung and other names on lower rungs. The value of this technique is that it not only determines what names are preferred or considered superior on a given criteria, it also reveals a sense of respondents' discrimination in the distance between the various names.

Metaphorical excursion techniques often utilize different sensory modalities to provide insight into the various dimensions of names, i.e., what associations the names bring to mind in terms of sounds, smells, textures, sight, taste.

In a project for a snack-food manufacturer, respondents were asked to imagine the look, feel, mood, sounds and overall image of a "place" or "land" if it were known by a given name. Several names were received positively and considered appropriate for the category. However, certain names were found to be much more emotionally involving, possessing a fantasy-like quality consistent with the intended brand image. Certain names evoke images of fairs, euphoric sounds of joy - "Yippee!" - fireworks, warm sun and family bonding. The findings helped the brand team know they were on track as they were attempting to move the product "beyond the ordinary, everyday snack."

In personification of a name, respondents describe - and sometimes draw - the type of person they think would use a product with a given name, i.e., gender, age, personality, interests, etc. Follow-up questioning delves into what respondents consider the name's strongest advantages, and any negative associations. A variation is to provide respondents picture decks and ask them to choose photographs of people who would be likely to use a product with a particular name.

**Narrow the list**

The insight gained from qualitative research helps clients now more confidently narrow the list of names. Many complete the evaluative process by taking the two or three strongest contenders to quantitative testing.

Name research can also be useful after a name has been selected. An example is a national jewelry retailer who was convinced it had a winning name for a line of engagement rings but was unclear on how to communicate it to the target audience. An in-depth focus on the one name helped the advertising team - most of whom were under age 30 and had never been married - identify the mood and tonality to pursue in creative development.

One final, cautionary note: names that may be used or advertised in countries other than where they originate require additional research. It is prudent to determine if these names have different and/or negative meanings elsewhere. The classic example is General Motors' introduction of the Chevy Nova in Spanish-speaking companies where "no va" means "doesn't go." Although its authenticity is sometimes challenged, this legendary story remains an effective reminder that a name's global implications should always be considered. | Q

qualitative research

# For marketers or for scholars?

By Maria Gracia Inglessis

Marketing-focused ethnographic research offers companies deep insights about consumers' motives, values, attitudes, beliefs and behavior that can be crucial at any stage of the marketing process - from product creation to campaign evaluation and reinvention. Without a doubt, this kind of understanding is essential. Products and services that don't click with consumers in relevant ways are destined to fail. Since marketing nowadays is so consumer-oriented (as opposed to product-oriented) ethnography has rightly become more popular in marketing research.

Ethnography has its roots in social and cultural anthropology and there are many traditionalists who feel that the only "real" ethnographies are those conducted by scholarly ethnographers. While the ethnographic projects conducted in the name of marketing share some similarities to those done for anthropological purposes, there are distinct differences. Marketers who conduct ethnographic projects may never earn the full respect of those in the academic world but as we will see they can benefit from applying to their own projects some of the procedural rigor that characterizes academic ethnographies.

**Untapped needs**

Some of the most common applications of ethnography in consumer research include new product and concept development. For example, by discovering untapped consumer needs or unexpected uses of the product, marketers might develop a new product line or a more effective positioning for an existing product. Also, by understanding consumer evaluation and use of products and spaces, retail performance might be maximized (lights, signs, location, etc.). Another application is the study of ethnic or other sub-cultural groups, to create, for example, consumer categories and prepare strategies based on those segments.

**Both camps can lay claim to, benefit from, ethnographic studies**

Furthermore, ethnography can help researchers understand the process of decision-making: Why do consumers buy this product and not a competing one? What are the factors influencing the

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decision? How is the negotiation with family or group members and the self?

**Understand the experience**

Ethnography intends to understand the human experience in an inductive and holistic way. As part of the naturalistic inquiry tradition, ethnographic research takes place in real-world settings, without manipulation of the subject under study.

In contrast to the hypothetical-deductive approach of quantitative research, ethnographies do not require the specification of main variables or the statement of a specific hypothesis to be tested. In ethnographic research, the inductive analysis allows the analysis dimensions to emerge from consumer behavioral patterns. Then, theoretical frameworks about what is happening in the particular context are grounded in field experience rather than imposed a priori.

From the purist point of view of a traditional anthropologist, ethnographic marketing research does not always follow this principle in a rigorous way. When marketers conduct ethnographic research, they might already have clear ideas about the dimensions of the phenomena they need to understand. For example, the objectives of their clients or the type of product under consideration create dimensions and categories that affect the research a priori.

Another principle of the anthropological tradition is the role of the researcher. This is the degree to which the researcher is a research instrument and how involved the researcher is in the community or group under study. There is a continuum between complete submersion in the group that is being studied ("going native") and objectively observing it. Any point of the continuum is accepted and implemented by anthropologists and marketers alike.

However, traditional ethnographers would attack marketing ethnographers because of the short time they spend in the field. Traditional ethnography requires studying the subject for an extended period of time. Marketers, on the other hand, usually conduct shorter ethnographies due to the nature of the project and external deadlines.

Purist ethnographers might complain that marketing ethnographies are snapshots rather than stories, contradicting the thickly descriptive nature of ethnography. On the other hand, given all the time and space constraints, marketing ethnographers have to quickly develop a sharp and intelligent way of capturing, analyzing and interpreting behavior. Marketing ethnographers also have the opportunity to participate in more studies, all diverse, during their careers. One could wonder: Do we learn more about consumer behavior in a three-year study with a single group or topic than in multiple studies with different segments in the same time period?

**Emic vs. etic**

Another important aspect of ethnography is the distinction of emic vs. etic perspectives. The emic perspective refers to the understanding and classification of the phenomena based on the language and indigenous categories used by the people under study. On the other hand, the etic perspective refers to the theoretical categories created by the anthropologist or marketing researcher.

Purist ethnographers would argue that only emic categories should be used, because they are truthful to the group being studied. However, some other researchers accept that it is also important to convey the comparative, interpreted cultural significance of the emic perspective by using categories that are familiar to the audience. This is particularly important in marketing research, as the final reader of the research report is frequently a client who expects technical terminology. In my opinion, a combination of both perspectives is the best approach. Indigenous categories should be compared and contrasted with theoretical categories.

Ethnographic research is a very powerful research approach for studying ethnic or sub-cultural consumer behavior. For example, it allows researchers to segment markets based on how culture impacts the choice and use of a product/service under observation. Naturalistic research allows for an understanding of the cultural dimension of product usage, for example the rituals of personal hygiene and grooming, the roles of the different members in the family and how those roles affect decision-making.

**Understanding the design**

An exploration and understanding of the different aspects of the ethnographic research design in academia certainly has benefits for marketing researchers. The first step is the literature review. The review of the academic and trade literature, as in any other research approach, helps to understand how culture as a moderating factor of consumer behavior has been studied. Moreover, in ethnographic research the literature is reviewed continuously, as interplay between data collection, data analysis and review of the literature is ongoing.

As the researcher analyzes the data, he or she might start finding cultural aspects that shape consumer behavior that were not considered initially. This might lead to further data collection.

In terms of the unit of analysis, the holistic approach encourages the researcher to observe the context in which individuals and groups live, even if the research focuses on the individual. This includes considering the social and cultural groups in which individuals live, the interactions with members of the same or other cultural groups and the type of events that take place.

In general, ethnography uses a

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purposeful sampling. This means that key informants and information-rich cases are selected because one can learn from them issues of importance to the study. For example, if the object of the study includes understanding differences among unacculturated Hispanics, acculturated Hispanics and Hispanics in the process of acculturation, the selection of key cases representing these groups should bring to light cultural differences. This heterogeneity of the sample is crucial in cross-cultural research.

In terms of data collection methods, observations and in-depth interviews capture participants' experience of the world, from his or her own perspectives. Observations take place in naturalistic settings. The researcher might capture the importance of cultural objects or symbols that construct the surroundings of the individual or group under study. These objects and spaces might be manifestations of internalized cultural norms, values and beliefs. For example, the researcher might capture the importance of tradition in a Hispanic family if he/she observes a Hispanic child wearing traditional fabric diapers instead of the modern diapers worn by children in the U.S. Other more obvious examples would be the observation of Catholic images (or the lack of them) decorating a Hispanic house.

Ethnographic observations also focus on rituals. These repeated norms of behavior also convey cultural practices and uses of imagery. One example of this is the ritual of a typical Italian dinner, with the mother serving everybody seated at the table, bringing one dish after the other according to the traditional order.

Cultural characteristics of consumer behavior might also emerge when analyzing roles. Examining the relationships among members of the group or family can aid in understanding the nature of opinion leadership, communication in social networks, and the decision-making process. Do fathers have different roles in purchase decision-making across different cultural groups? Is the father-child relationship based on respect and hierarchy? Is the youngest child the one who decides what is for dinner? These are the kind of questions that ethnographic observations might answer.

Ethnographers might also observe behavior in practical activities like shopping or eating. In these activities, cultural patterns of consumer behavior emerge. Are Latino women going shopping together? Are there any indicators that they enjoy shopping as a social experience?

The observation of verbal and non-verbal communication such as proxemics, body language, dressing codes and so on helps to decipher cultural codes.

**In-depth interviews**

Focused observations grasp the unconscious, spontaneous behaviors in real-time, overcoming the limitation of participants' difficulty in recalling their own behaviors. But observations might have some limitations when it comes to understanding emotions, feelings and internal needs. Here, in-depth interviews come to play.

In-depth interviews are used to better understand the internalization of cultural values and beliefs as verbalized by the participants. Answers, in the form of narratives, might reveal cultural values, archetypes and imagery central to the nature of the culture. Interviews also help to probe and clarify.

Traditional ethnographic interviews take several hours. Traditional ethnographic observations might take several years. As discussed before, the nature of marketing research doesn't allow for this kind of depth. Due to this, cross-cultural researchers need to be culturally sensitive enough to focus on the key aspects that yield deep insights in the most time-effective way.

The cultural sensitivity of the researcher is also important when it comes to analyzing and interpreting the data, and finally reporting the results. Understanding cultural dimensions and orientations helps the researcher overcome the challenge of interpreting the bulk of information gathered in a synthetic and creative way.

The process of making sense of the data, from a cultural perspective, mainly depends on the researcher. The researcher, therefore, becomes the main research tool. Translating raw data into theoretical models, translating the essence of what the data revealed and offering relevant managerial implications are the main challenges of marketing ethnographic research.

**No need to go native**

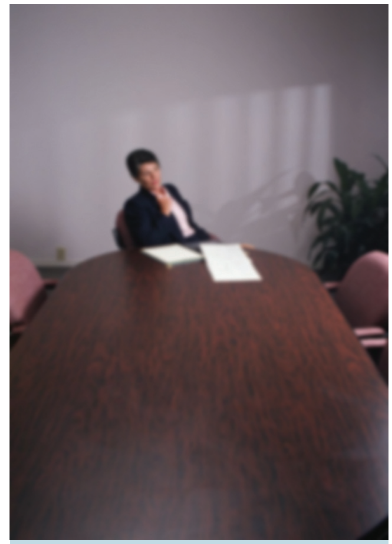
Marketers don't need to "go native" and spend three years in the field in order to understand the meaning of a particular product to a certain sub-cultural group. However, marketers do need to show that the research design, data collection and analysis are rigorous and systematic.

Also, it is very important that the data be high-quality, credible, rich and representative. The analytical process by which data is analyzed into themes and categories needs to be clear and consistent as well.

While it's unlikely those in the academic world will ever confer full legitimacy upon marketing-related ethnographies, scholars need to allow and encourage novel researchers and students to conduct as much ethnography as possible so that they can acquire the needed experience. More continuous collaboration between scholars and practitioners will certainly benefit both groups. By understanding more about the other's perspective, perhaps scholars and marketers can mutually benefit and, in sharing knowledge, raise the quality of all ethnographic efforts. | Q

qualitative research

# The voice at the head of the table



By Mary Reynolds

I sat down recently for a late-afternoon chat with my employer, long-time focus group moderator Barbara Allan. Our conversation delved into her perceptions of what facets go into making a superior focus group moderator and what needs to be present to produce quality focus groups.

*Q: Is moderating skill something you are born with or something you learn?*

Of course, Allan says, it is both. Yet, truly great moderators have an inborn sense of how to read a group, the questions to use to get to the core of an issue and an uncanny ability to sum up in three or four sentences what the group said.

Certainly, moderation is a skill that can be learned, but it is best when done by a person who has a talent for getting the most out of a group of people.

The real question is: what qualities separate a good moderator from a really great moderator? And more importantly, why do they matter? Allan believes that the following are must-haves for anyone who wants to become a moderator.

• Natural curiosity. Phrases like "I don't know," "I guess so" and "I'm not sure" create great opportunities to any true moderator. No accomplished moderator will allow any of these responses to be the final word - they need to know more, they need to understand the whys, and they have the skill to help respondents comfortably articulate their thoughts.

**A veteran moderator shares her thoughts on the focus group process**

• Ease in interacting with people. Wallflowers need not apply for the job of moderating. Nor, for that matter, should someone who has to be the center of attention enter the ring. Neither is well qualified to sit at the head of the table.

• Ability to remain impartial, open, and unbiased. Check your opinions at the door. More important, perhaps, than being able to interact with people is not letting your biases show. Regardless of the topic or what respondents say, the moderator acts only as a sounding board.

• Flexibility. No matter how well-prepared the discussion guide is, or how familiar the moderator is with the topic, revelations coming from respondents create the need for additional or different question areas. Frequently, it is these bolts of brilliance that turn an ordinary

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group into an extraordinary group. However, it is up to the moderator to handle what pops up and work with it.

• Strong verbal skills. Moderators should use language that is direct without being confrontational, and clear without being biased. However, less attention is given to the importance of being able to speak the language of everyday consumers who frequently use jargon, colloquialisms and figures of speech to convey their points. Being familiar with the latest catchphrases is especially helpful, but familiarity does have a caveat. It can sometimes be useful to pretend not to know what a phrase means, thereby forcing respondents to put their own spin on it, thus providing even greater insight.

• Excited about the process of discovery. The immediacy of focus groups makes them particularly satisfying for market researchers who like being close to their subjects. For moderators who are hooked on the process, there are few things more exciting than beginning a focus group with a group of respondents and walking away with knowledge to influence a client's success.

• Creating comfort and trust. When respondents feel comfortable, signs that a group is working are their body language, interest, involvement, and the number of times they laugh. Laughter can also be a sign of nervousness, something a skilled moderator learns to listen for.

*Q: What makes an ideal focus group client?*

Having an interest in conducting focus groups is a good first step to being a good focus group client, but it is not enough, Allan says. What she looks for in clients who come to her to do focus groups are the following:

• Willingness to listen and learn. Ideal clients are curious about the process and interested in knowing how to best use this research technique. Clients who are unwilling to listen to the pluses and minuses of this type of research are not good candidates.

• Understand that focus groups have limitations. Clients who believe that a focus group can include a wide range of topics are bound to be disappointed.

• Has clearly articulated goals. Focus groups that function as fishing expeditions are not going to satisfy anyone. If the client does not know what they want going in, it is best to step back and wait until their goals are well defined. Poorly-defined goals lead to unsatisfactory groups.

There are also qualities that signal that someone will not be a good client. Clients whose expectations of focus groups include either of the following should be steered to another type of research:

• Statistical data. Focus groups are ideal for quickly learning the acceptance of a concept or an idea. However, they are not statistically reliable and should not be used to determine such things as pricing.

• Selling opportunity. A group of potential customers sitting around a table is irresistible to some clients. There are clients who would like to start pitching these respondents or using their image/words afterwards.

Another type of client to steer clear of is someone who fancies themselves as a moderator, Allan says. Typically they have experience with focus groups and believe that there is nothing much to sitting around a table and asking eight to 10 people a series of questions.

Allan clearly remembers one client she wishes she had not agreed to work with. The warning signs were all there but were not heeded. The most telling sign of all was knowing that the client had hired and fired a long list of well-qualified moderators. None of these moderators, according to the client, understood her business or knew how to ask the right questions.

Allan felt confident that by working closely with the client and thoroughly reviewing the discussion guide, she would be able to succeed where others had failed. She was wrong, and after conducting the first of what should have been six focus groups, she too was relieved of her responsibilities.

What could have been done to avoid this situation? Allan says she should have listened to her inner voice. She should have asked more probing questions of the client about why the other moderators didn't work out, and she should have refused to take on the project.

*Q: How do you create extraordinary groups?*

Clearly, it is the moderator's job to bring strangers together to talk about what are sometimes very personal issues. Being able to get people to open up and feel comfortable is first on the list of a moderator's tasks.

That is sometimes easier said than done, Allan says. Some groups take more effort than others. Good moderators have to be able to read respondent body language and understand that crossed arms, a lack of eye contact, and one-word answers are strong indicators that a group will require more skill. She says she can tell within seconds of respondents entering a room what their group dynamics are.

Projective techniques that create room for respondents to have some fun while expressing themselves work well, as do the following:

- An energized moderator who lets all respondents know their opinions matter.
- Inviting respondents to agree/disagree with each other.
- Using fun or even a few silly questions.
- Breaking the group into teams to discuss issues.

*Q: How would you describe the perfect focus group?*

There is no question that some focus group gatherings stand out. Following are some characteristics of great groups, according to Allan.

- The dynamics are strong - eye contact, relaxed bodies, alert.
- They listen to what others say and respond.
- Their eyes are wide open and they move toward the table.
- No one attempts to dominate the group.
- Everyone has something to offer.
- They laugh often.
- They are creative.
- They are having fun.
- No one looks at their watch.

*Q: What is the best advice you have ever been given about doing focus groups?*

After more than 20 years and thousands of focus groups, Allan says the best advice about doing focus groups is not about how to get people to open up or how to write a discussion guide. It relates to how to start a project. For her, the best advice she was ever given was: "Get to know your client, their expectations of the research and have a clear understanding of the two, three or four things that must come out of the research."

A winning formula for quality focus group research is to understand the "pain" that is creating the need for clients to do the research and have a totally open mind in terms of design.

At the end of the day, there is great satisfaction in delivering tools/insights that benefit the client, while also stretching as a moderator by improving your skills, Allan says. | Q

ADVERTORIAL

# ANOTHER LINE IN THE SAND

## The widening gap between focus group facilities

**By Ted Donnelly, Ph.D.**

*Editor's note: Ted Donnelly has a research Master's in Business and a Ph.D. in Consumer Behavior and Advertising Research.*

The client enters your facility about three hours ahead of his scheduled time (he caught an earlier flight). He informs you that he has no idea of how many observers will be in attendance. The stimulus to be tested has not yet arrived (he needs color copies ASAP). Fifteen clients suddenly walk in to watch his facilitation….ALL want to get online and only WiFi will do, thank you very much. Two are vegetarians, one has an allergy to seafood, three are on Atkins, and all want Starbucks!

**NO PROBLEM…NO PROBLEM…NO PROBLEM!**

Welcome to qualitative research in the year 2008. This is the real world, and yes, they really do want their Bananas Foster made *tableside* using only lactose free, 2% milk. No more handwritten grids, no more 1-2-page screeners, no more tap water, and no more excuses. Today's average focus group roster may include a wish list as exclusive as a State Dinner at the White House. Personality segmentation, algorithmic formulas, and convoluted quotas are all now the norm.

I am in the unique position of being a moderator employed by a company that owns a 7-suite facility. As Vice President of Research, I oversee projects from the facility end as well as the buyer side. When wearing my analyst hat, I moderate both within our facility and beyond. Consequently, I have been on both sides of the proverbial coin. As it were, I feel as though I have a pretty strong grasp as to what clients want, need, expect, and for the most part, are willing to pay.

It is not a "six of one half a dozen of the other" environment anymore. That is, there appears to be a widening gap amongst focus group facilities: the 25% who can keep up with the pace and the vast majority who flounder in an oblivious haze of mediocrity. What is parting the seas between the *Cow* and the *Comoda* is service quality. With project complexity on the rise, more responsibility rests with the facility's project manager. No longer can they just blindly recruit according to specifications. Rather, a good manager will work with the client to develop an understanding of the research objectives so that they can more effectively target the appropriate audience for the groups. However, this is only the first step. Service quality is key and it runs from the project manager right down to the whipped cream on the strawberries.

Accordingly, we have developed a client Declaration of Rights:

1. **The clients have the right to receive a reply for bid requests within 1-2 hours.**
2. **The clients have the right to receive recruiting updates on a daily basis.**
3. **The clients have the right to have their screener scrutinized for comprehension.**
4. **The clients have the right to a project manager that is committed to understanding the nuances of their project.**
5. **The clients have the right to have dialogue with the project manager almost any time.**
6. **The clients have the right to NOT have to manage the project manager.**
7. **The clients have the right to interface with the exact audience that they paid to have recruited.**
8. **The clients have the right to have as many hosts/hostesses as necessary to properly service their project.**
9. **The clients have the right to have respondents properly re-screened.**
10. **The clients have the right to only have to ask once.**
11. **The clients have the right to NOT have their research compromised by incompetent facilities.**
12. **The clients have the right to creature comforts when they are road weary.**
13. **The clients have the right to service above and beyond.**

As marketing researchers, we are in the service industry. Is service quality really too much to ask?

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# YOUR FAVORITE FOCUS GROUP FACILITY MAY NOT BE DOING YOU ANY FAVORS

**By Ted Donnelly, Ph.D.**

*Editor's note: Ted Donnelly has a research Master's in Business and a Ph.D. in Consumer Behavior and Advertising Research*

If your favorite focus group facility does not have a highly sophisticated, computerized database of respondents…then you had better learn to accept cheaters and repeaters. Believe it or not, there are some facilities, which are quite busy, that still use a 3x5 index card system to keep track of respondents.

Strangely enough, many of them are getting away with it. What is "IT" you asked? IT is the antiquated system to recruit respondents for your focus groups. Some facility's *system* may be compromising the integrity of your project. The main problems lie with tracking research participation and managing an ever-increasing number of segmentation variables.

As we all know, the pace of research projects has become fast and furious. That makes monitoring research participation much more challenging. Multiple projects are being launched at any one time, making it critical to track not only *past* participation, but also *future* participation. Respondents may be scheduled for interviews that have not yet occurred, which would make them ineligible for other projects that may follow.

Additionally, marketers are segmenting their consumers to nearly comical degrees. In addition to the typical demographic variables, the makers of your favorite products and services slice and dice their customers by their personality traits, lifestyles, consumption patterns, and along a medley of other variables. The result of this radical segmentation is that marketing researchers are searching for a much more multifaceted mix of respondents. Computerized databases allow us to track and search for respondents along many segmented variables. By allowing the computer to cut through the first several layers of demographics, we can more efficiently recruit respondents by increasing our dialings focused on finding the lower incidence variables.

In today's research landscape, it has become unfeasible to manage research respondents by conventional, non-computerized means. Recruiting incidences have dropped dramatically due to a swelling number of segmentation variables. Fortunately, technology has allowed us to raise the bar in terms of the information that can be revealed through research. In the same way that a mathematician can make greater breakthroughs when not bogged down by doing trigonometry via long division, marketing researchers can now more accurately analyze the mind of the consumer. Computers allow us to track consumer behavior, run more sophisticated statistical analyses on attitudinal data, and allow us to manage more intricate consumer variables.

Additionally, if you can believe it, more research is being conducted than ever before. More research equals more research participation to track. The fact of the matter is that if a facility is recruiting without a computerized database, they either do not have a robust pool of prospective research respondents or they are not very busy. Either way, is this a company that you would want to handle your project? Do yourself a favor: determine which software program your facility of choice uses.

# APPLES TO ORANGES: SELECTING FOCUS GROUP FACILITIES THAT ADD VALUE TO YOUR RESEARCH

**By Ted Donnelly, Ph.D.**

*Editor's note: Ted Donnelly has a research Master's in Business and a Ph.D. in Consumer Behavior and Advertising Research.*

Have you ever noticed how all focus group rooms (observation rooms included) look exactly the same in brochures? You know the scene: gray walls, 12 chairs, conference table, maybe a flip chart. Many facilities advertise with these same generic photographs. Do they believe that the room is what they are selling? What their standard-issue focus suite photograph communicates is that either *they* do not know how they differ from their competition or that they do not believe that we think it matters.

The fact of the matter is that focus group facilities are not in the real estate business. Rather, they are in the service business. Consequently, when booking a facility, one must take a hard look at what is beneath the surface. The quality of the amenities is what adds value and enhances the entire research experience. While the services required are likely to vary from project to project, a facility's amenities as well as their flexibility in providing them are what make our jobs as moderators easier, and ultimately, what makes our clients happier. And at the end of the day, isn't that what it is all about? I have developed the following checklist, which may help you to select the best facility to meet your needs. It has been organized into various categories, so that you can easily add priorities that you have developed from your own experiences.

**<u>Facility Infrastructure</u>**

1. What is the viewing room capacity of the focus suite?
2. What is the respondent capacity of the focus suite?
3. How large a stimulus can the focus suite accommodate?
4. Does the facility offer conjoined focus group rooms for simultaneous IDIs/focus groups?
5. What is the appearance of the facility?
6. Does the facility have bathrooms right in the suite? How many?
7. Is the observation room and focus suite climate controlled? Are they independently controlled?
8. Is audiotaping included?

**<u>Management & Staff</u>**

9. How does the facility manage multiple projects on a single day so that different clients and respondents remain sequestered from one another?
10. Does the facility have the ability to meet special requests?
11. Are the facility owners present and available?
12. How many host/hostesses and support staff will be assigned to the project?
13. How is the attitude of the staff?
14. Is there a chef on staff?
15. Will the facility make *special trips* to procure last minute supplies for you or your client?
16. Is the staff able and willing to rearrange the focus group room?

**Recruiting**

17. Can the facility adequately handle low-incidence recruiting?
18. What type of database management software does the facility use?
19. What is the facility's policy for mis-recruits and non-recruits?
20. How does the facility proactively build their database?
21. What quality control measures are in place to keep the database uncontaminated?
22. Are algorithms a problem for the facility?
23. Does the facility send daily updates each morning?

**Tech Services**

24. Does the suite include a client lounge with a workstation and closed circuit television?
25. Is there computer access for client use?
26. How many broadband internet connections are made available to the client?
27. Does the facility have video teleconferencing capabilities?
28. Does the facility have videostreaming capabilities?
29. Does the facility have technical support on staff?
30. Is there client access to a fax machine?
31. Does the facility offer digital quality video?
32. Does the facility have DVD recording capabilities?

**Travel**

33. Does the facility have free parking available? How many spaces?
34. What transportation is available to the facility?
35. Will the facility make travel arrangements for clients?
36. How many miles is the facility from the airport/train station?

The next time you are comparing bids, remember that the facilities are not as similar as their brochure photos may indicate. Decide what amenities are the most important to achieving your goals, and find out which facility can best meet your needs. Finally, never forget that age-old adage, which applies in business and consumerism alike: you get what you pay for. Be sure to find out where your research dollars are going.

## Survey Monitor

continued from page 10

### Expect to wait a little longer in Baltimore

When it comes to service, Baltimore is the slowest city in America, according to the Mystery Shopping Providers Association (MSPA). The results were based on a national survey geared to measure the average amount of time people spend waiting in line to check out at the grocery store, see a bank teller, purchase clothes or get a quick meal.

The 2006 Wait Time Survey solicited more than 10,000 responses from mystery shoppers throughout North America. The survey focused on wait times throughout the continent, zeroing in on the top 25 U.S. cities based on population.

The survey asked consumers to measure the time they spent waiting in line at the following locations: banks, clothing retailers, department stores, fast-food restaurants, sit-down restaurants and grocery stores. Gas station convenience stores, retail outlets and retail specialty stores also were measured.

Phoenix earned the title of fastest city in America. It scored an average wait time of 3.05 (3 minutes, 5 seconds), beating out Portland (3.30) and Minneapolis (3.41).

In the centuries-old battle for supremacy between New York City and Los Angeles, the survey showed the residents of both cities were the losers: both cities tied for 21st out of 25 cities in terms of overall wait time at 4.31, beating only Detroit (4.52), Washington, D.C. (4.58) and Baltimore (5.13).

In addition to wait times, shoppers were asked if the amount of time they waited in line would affect their desire to return to the same location. This information was used to create a "return ratio" that helped to measure the tolerance of shoppers to wait times in each city.

Not surprisingly, Baltimore had the worst return ratio of the 25 U.S. cities surveyed, at 77.3 percent. This means that only 77.3 percent of shoppers would return to the same location in Baltimore based on the wait time.

Mirroring the slowest average time, Washington, D.C. was next, with a 77.6 percent ratio. These cities were followed by Cleveland (77.7 percent), Orlando (78.1 percent) and Detroit (79.6 percent).

Cleveland and San Francisco performed poorly when comparing wait times to wait time satisfaction levels. Cleveland tied for 10th out of 25 cities in average wait time, but dropped 13 places to 23rd when asked if wait time negatively affected the shopper's decision to return. San Francisco dropped 10 spaces from a tie at 10th to 20th. These results suggest shoppers in these cities expect much lower wait times than they are receiving, which makes them less likely to return to the same location again.

Conversely, several cities saw improvements when comparing wait times to wait time satisfaction levels. Miami ranked 19th in wait time but 12th in wait time satisfaction; Pittsburgh ranked 16th in wait time and 9th in wait time satisfaction – an improvement of seven places. This suggests shoppers from these cities expect longer wait times in general, and put up with longer wait times better than people in other cities.

Not surprisingly, gas station convenience stores were the fastest category, with the typical customer wait averaging 2.17. Convenience stores were followed by fast-food restaurants (3.16) and sit-down restaurants (3.28). Retail categories scored the worst, starting with department store average wait times (5.23) followed by outlet stores (5.11) and clothing stores (4.55).

Waits get worse for consumers later in the day. The slowest time for consumers is between 2 p.m. and 5 p.m. (average wait is 4.22), followed by 5 p.m. to 8 p.m. (4.20) and 8 p.m. to 11 p.m. (4.03). 5 a.m. to 8 a.m. is best (2.40), followed by 8 a.m. to 11 a.m. (3.36) and 11 a.m. to 2 p.m. (4.02). More complete results of the survey are available at www.mysteryshop.org.

### Midwesterners have cut the (phone) cord

More and more U.S. households are dropping their landlines and opting to go completely wireless. According to San Francisco research firm Telephia, households in Detroit and Minneapolis-St. Paul have the highest rate of wireless substitution among the 20 largest cities in the country. Detroit and Minneapolis-St. Paul posted household wireless substitution rates of 19 and 15.2 percent, respectively. The Tampa metropolitan area secured a 15.1 percent rate, representing nearly 177,000 households. Nearly 219,000 (14.3 percent) households in Atlanta and 220,000 (13.6 percent) households in Washington, D.C. cut the cord. Rounding out the top 10 were Phoenix, Seattle, Denver, Boston and Los Angeles.

San Francisco, which generally leads the nation in the adoption of many new technology products, landed at the bottom of the list. According to Telephia, the San Francisco metropolitan area posted just a 5.5 percent wireless substitution rate, which works out to be a little over 105,000 households. "San Franciscans have traditionally been early adopters of advanced technologies. It is a bit of a surprise to see this metro much lower on the list, but this could be driven by the area's high income level or its relatively low level of mobile network quality," says Kanishka Agarwal, Telephia's vice president of new products. "For topology and zoning reasons, mobile networks in San Francisco are not as reliable as compared to other top cities and it's a less attractive substitute." For more information visit www.telephia.com.

### Best-regarded insurance firms have rapport with the public

It takes more than good service to impress consumers these days, reveals an Ipsos survey of insurance company reputations. Other than service, what distinguishes the most highly regarded and most trusted insurance companies in America from the industry as a whole is the public's perceptions about their social responsibility and management.

"We found that the best performers are both market leaders and smaller companies that occupy a niche," says Nicolas Boyon, a senior vice president with Ipsos Public Affairs and author of the study on consumer perceptions of the insurance industry. "What they have in common is a strong rapport with the public. They've regularly and consistently communicated their social values and contributions. They are seen to care about the community, about their employees and about being ethical."

After Hurricane Katrina devastated many parts of the Gulf Coast in 2005, Ipsos began tracking the insurance industry's overall reputation – and that of over 30 companies – on a continuous basis, interviewing thousands of American adults in the process, on a range of issues.

The Ipsos study shows that while the reputation of the insurance industry as a whole is relatively poor, every single individual company is doing better – and in some cases, far better.

More Americans hold an "unfavorable" opinion of the insurance industry (44 percent) than have a "favorable" opinion (21 percent) while 35 percent are neither favorable nor unfavorable. Among other sectors measured, only the oil and gas industry fares more poorly (11 percent favorable vs. 72 percent unfavorable). At the other end of the spectrum, the food and beverage industry and charity sector enjoy favorability scores of 61 percent and 60 percent respectively.

The area the insurance industry is perceived to be the best at is "being profitable and providing a good return to shareholders." This is also the characteristic that is least likely to generate favorability from the general public, ongoing tracking shows.

The industry continues to suffer from a poor image around social responsibility, which has a much greater impact on favorability. More Americans rate the individual insurance industry's performance as "poor" for being trustworthy, having ethical practices and for caring about communities than rate it as "good."

The image of individual insurance companies contrasts with that of the industry. Some of the 30 leading companies studied are viewed favorably by as many as 50 percent of the American public, and none is viewed unfavorably by more than 12 percent.

Insurance companies with the highest favorability scores tend to be those with the most policyholders and/or the better-known ones, showing that, as in other sectors, market share and awareness are major predictors of favorability.

However, favorability scores are also largely driven by perceived performance related to service, social responsibility and management. This is how certain insurance companies, some large and some not so large, distinguish themselves from their competitors.

The best-regarded insurance companies also capitalize on the favorable opinion of their policyholders and can count on their active support as advocates. The best-rated companies, many of which are market leaders, receive a favorable opinion from over 80 percent of their policyholders.

This may explain why, one year after Katrina, an Ipsos survey revealed that that nine in 10 homeowners in the Gulf Region (89 percent in Louisiana and 93 percent Mississippi) were satisfied with their insurance company.

Results are based on interviews conducted online with a representative sample of 4,167 adults nationwide, August 3-28, 2006 and interviews conducted by telephone with a representative sample of 881 adults homeowners in Louisiana and Mississippi, August 1-7, 2006. For more information visit www.ipsos-na.com.

## USDA food pyramid is working, respondents say

The U.S. Department of Agriculture's (USDA) food pyramid and manufacturers' food labels are intended to help adults follow a healthier and more nutritious diet. A Wall Street Journal Online/Harris Interactive Health-Care Poll confirms that many people make use of these information sources. In fact, two out of five (40 percent) adults say they have changed their eating habits to conform to the USDA's food pyramid and half (51 percent) always or very often refer to food labels when making food choices for themselves or their families. These adults are most likely to cite eating a balanced, nutritious diet as their main reason for utilizing food label information. These are some of the results of an online survey of 2,706 U.S. adults, ages 18 and older, conducted by Harris Interactive, Rochester, N.Y., between September 15 and 19, 2006 for the Wall Street Journal Online.

Most adults (95 percent) have read food labels at some point when making food choices for themselves or their family in order to learn nutritional information about a product. Of adults who read food labels, 39 percent say their most important reason for doing so is to eat a balanced, nutritious diet, compared to managing a medical condition (such as diabetes, high cholesterol or blood pressure) (23 percent), and losing weight (19 percent). Adults whose most important reason for reading food labels is to manage a medical condition are slightly more likely than the others to always or very often read the labels (63 percent vs. 58 percent for a nutritious diet; 52 percent to lose weight).

When making food choices for themselves, adults who read food labels are most likely to look for information regarding fat (83 percent), calorie (76 percent) and sugar content (72 percent). Apart from organic information (26 percent), fiber content was least cited, though still looked at by a majority (56 percent).

When making food choices for a child, parents are most likely to focus on sugar content (82 percent), nutritional value (80 percent) and fat content (73 percent). Interestingly, one-third (34 percent) of parents say they look for organic content information when choosing food for a child.

Of the adults who say they have altered their diets to conform to the USDA's food pyramid guidelines, 22 percent say they have done so with regard to daily recommended food group servings and 19 percent say they have done so with regard to portion size. For more information visit www.harrisinteractive.com.

## Annuities suffer from awareness problem

Recent reports from Chicago researcher Mintel indicate that there are both challenges and opportunities remaining for the annuities industry. Less than half (48 percent) of all respondents to a Mintel consumer survey conducted this year were familiar with annuities, and only 46 percent of those were 65 and over. Of the respondents who were familiar with annuities, more than 60 percent expressed concern with being "locked in" - a significantly higher number than those who cited fees and expenses as a major issue (32 percent).

Total U.S. annuity sales were estimated at $216.5 billion for 2005, and are projected to grow to $261.6 billion by 2009. As the Baby Boom generation reaches retirement, an entire new "retirementality" has emerged - one focused on a much more individualized planning experience than in years past. As retirees look for more flexible options to address retirement planning, annuity providers are adding features to their products to address these concerns.

"Consumers are looking at retirement in a totally different way, and this is where annuities can find their greatest opportunity for expansion," says Susan Menke, senior financial analyst for Mintel. "Annuities have previously taken a back seat to mutual funds, and now they have the chance to tap into a fresh audience. As Baby Boomers and beyond look for more diverse avenues to grow their retirement funds, annuity companies can take advantage of this."

Mintel's research further showed that women were more likely to value the safety aspect of annuities. Men were more likely to state that they valued the fact that purchasing an annuity freed them from making investment decisions. These differences illustrate an even greater need for flexibility in annuity products, combined with a reinforced emphasis on safety and security in simplified consumer marketing campaigns. "So many retirement options are blooming for Boomers now, and companies really need to reposition themselves as having the best possible retirement options," says Menke. "Since consumers are not as familiar with annuities as they are with other investments, these companies will need to work hard to make their products stand out." For more information visit www.mintel.com.

## Product and Service Update

continued from page 14

communication. This calculation would be similar in scope to the gross ratings points used to estimate the potential audience for TV advertising.

The equation is: traffic x compliance = opportunity to see.

By using existing statistical models that factor out duplicate impressions (accounting for multiple "visits" to the area by the same people) a measurement for consumer reach could be calculated for specific locations in the store: traffic x compliance x unduplicated impressions = in-store reach.

The initial hypothesis was that reliable traffic estimates could be achieved by using data already collected through POS systems and other easily obtainable information, such as store format, product category, units sold and number of category baskets. (The exact formula would be derived on an ongoing basis by directly measuring traffic in a specified set of stores.)

This hypothesis was validated through a pilot study that counted traffic in 63 product categories in 10 stores using infrared sensors positioned in aisles, perimeter locations and store entrance and exit zones.

Adoption of the P.R.I.S.M. model by the industry would deliver a common language for retailers, manufacturers and media buyers to assess the value of retail as a marketing channel and compare its effectiveness to other media such as TV, radio and print. It also would give marketers a metric through which to evaluate the store as a vehicle for generating brand awareness and trial, putting the store on a level playing field with other forms of mass media. For more information visit www.instoremarketer.org.

### NPD service will track luggage and accessory purchases

The NPD Group, Port Washington, N.Y., is developing tracking services for the U.S. accessories business, to be launched in the first half of 2007. The consumer tracking service will monitor consumer purchasing for a range of accessory categories, including bags and luggage, watches, jewelry, sunglasses and small leathergoods. The retail point-of-sale tracking service will initially report style-level sales of women's and men's bags in department stores and national chain stores, and will expand to other categories thereafter. Bags in both services will include fashion handbags, sport bags, business bags and travel bags/luggage. For more information visit www.npd.com.

### New metric measures mall shopper audience

New York-based Scarborough Research and Arbitron Inc. have announced a new audience metric designed to provide more precise measurements of the American mall shopper. The new metric, the Scarborough Mall Shopper Audience data, and its incorporation into an advertising reach and frequency model, enables advertisers, ad agencies, media buyers and other marketers to understand the media value of their ads and promotions in malls and shopping centers. Shopping venues also can now be evaluated as part of the communications mix in a traditional multimedia advertising campaign.

Scarborough Research began its development process for this new shopper metric by first conducting personal interviews with decision makers at advertising agencies to establish the need for mall audience measurements. Scarborough then tested and refined a shopping center-centric reach-and-frequency application. The result is that the company expanded its multimedia local market syndicated study to collect information on "past seven-day" shopping for individual malls and shopping centers.

The seven-day mall shopping measurement supplements the "past 30-day" and "past 90-day" metrics already offered in the study. Scarborough's new mall-centric reach-and-frequency application will let media planners and buyers the ability to assess unique shopping center visitors and the frequency of their mall visits. Mall shoppers can also be analyzed with any of Scarborough's other measurements on the shopping patterns, lifestyles and demographics of American consumers to help establish the value of a given mall audience.

The new mall shopper insights, combined with Scarborough's other consumer measurements, are an additional source of information enabling mall developers, retailers and others to create more relevant shopping experiences for their customers. Shopping center developers can use Scarborough to examine the mix of retailers, restaurants, events and amenities offered at a given shopping venue.

This latest study provides a comprehensive measurement of mall shopping behavior and preferences with data on approximately 1,500 different mall properties and in-depth profiles of their shoppers. Scarborough surveys over 210,000 adults annually across 80 local markets, measuring the shopping, media, lifestyle and demographics of American consumers.

The Mall Shopper Audience information is available to Scarborough clients via the company's syndicated research studies as of Release 2 2006. This release of data began issuing on a local market level on October 5, 2006. For more information visit www.scarborough.com.

### WebSurveyor and salesforce.com team up for CRM product

Herndon, Va., research firm WebSurveyor and salesforce.com have announced the availability of CRMSurveyor for salesforce.com's AppExchange, an on-demand directory and sharing service. CRMSurveyor enables companies to gather real-time customer feedback to improve processes in sales, marketing and service.

Through CRMSurveyor's integration with Salesforce, a customer is automatically asked a standard set of questions when a deal is won or lost, or a service ticket is closed. Results are fed automatically to Salesforce dashboards and delivered via e-mail in weekly, monthly and quarterly reports. E-mail alerts can be triggered when poor scores are received, enabling management to take immediate action. For more information visit www.crmsurveyor.com.

## Alliance tracks media habits of health care consumers

Under a strategic alliance between Scarborough Research, New York, and Evanston, Ill.-based information firm Solucient, Scarborough is embedding Solucient's HouseholdView proprietary life-stage segmentation system and HealthView Plus, Solucient's proprietary national research on consumer attitudes and behaviors around health care services, into Scarborough's databases on consumer shopping habits, media patterns, demographics and lifestyles. This will allow health care marketers to examine local consumer media utilization to create more efficient media plans targeting specific segments, based on health care needs. Marketers can also use segmentation information when planning other marketing programs, such as co-marketing initiatives.

Developed specifically for the health care market, the HouseholdView segmentation system identifies 56 different types of health care households. Combined with HealthView Plus research on 20,000 households annually, and the Scarborough local research of 210,000 consumers specific to each market, the Scarborough-Solucient partnership enables marketers to understand attitudes, behaviors and decision-making patterns of health care consumers. For more information visit www.scarborough.com.

## New Europe bureau for Harris

Harris Interactive, Rochester, N.Y., has launched HISB Europe. In addition to telephone, face-to-face and online data collection, HISB Europe will offer Harris Interactive's SynTrack Online, a consultative approach for transitioning studies online (from telephone, mail or face-to-face methodologies) while preserving trend data. HISB Europe will also make available Integrated Cati-Wapi (ICW), a technology for clients interested in conducting multi-mode, multi-language studies. For more information visit www.hisbonline.com.

## ARF launches online info center

The New York-based Advertising Research Foundation (ARF) and partner Roy Morgan International, a Australia-based research firm, have introduced the new, online Roy Morgan Info Center at the ARF, which offers access to research articles and papers on major industry topics.

For each topic, research articles, studies and presentations are offered. Once users find a topic of interest they can select an article or paper to download. Submissions from other companies are welcome. For more information visit http://arf.asteroid.com.au/.

## Suite update from Decisions Made Easy

Chicago software firm Decisions Made Easy has released version 6.2 of its Cipher Web, Cipher and Crunch product suite. It is free for all customers with an active maintenance agreement.

Version 6.2 of Cipher Web and Cipher include new features such as the ability to create an executive dashboard to see critical information at-a-glance with custom homepage functionality; immediately get information to keep abreast of changes and key facts with alerts; and save report changes or new reports in a personal report group. Customers can create and export Cipher results to Excel and create Monday morning and third-party reports to be distributed as Excel spreadsheets. Users can cross-code and work with attributes from a single screen for improved ease of use with the redesigned Element Editor and see attributes for each element displayed in a separate column within the grid. Crunch for Oracle offers the ability to use Oracle as the demand data repository for efficient data management and to leverage the organization's existing technology investment. For more information visit www.decisions-made-easy.com.

## SPSS enhances Dimensions

SPSS Inc., Chicago, has released an upgraded version of its survey research product suite, Dimensions 4.0, that enables professional agencies deploy surveys across a choice of customer channels such as phone, online, paper or any combination of modes. Users can conduct surveys in multiple languages and rely on administrative management capabilities to monitor surveys from a central location or across multiple dispersed sites. Dimensions' integrated platform allows users to add value to research studies and deliver customer feedback so that issues can be discovered and addressed in a timely manner.

Key enhancements in Dimensions 4.0: dialer integration - mrInterview now supports both the QTC and mrDialer offerings from SPSS; audio monitoring - with the dialer integration, one can not only watch interviews as they are being conducted but can also listen to the interviewer; a desktop reporting product; improved reporting options; new chart types; template table documents; improved data management; and SPSS 15.0 support. For more information visit www.spss.com.

## New division will aid N.Y. research recruiting

New York market research audience

recruiting firm Matrix Alliance Market Research LLC has launched a new division, nyaudiences.com, which provides information and news about current events and activities occurring in and around the New York area, with the goal of attracting New York area residents, business people and tourists to visit the site and to join the database. This database panel will be managed and maintained by Matrix Alliance and will be utilized as a supplementary part of its audience recruiting and event promotion service packages. For more information visit www.nyaudiences.com.

## BASES service looks at new-product adoption process

Covington, Ky.-based ACNielsen BASES is now offering BASES introSCAPE, an analytical framework designed to help marketers build stronger new product propositions with consumers. The foundation of BASES introSCAPE is a proprietary model that describes the process by which consumers adopt new products. The "SCAPE" in introSCAPE is an acronym for salience, communication, attraction, point of purchase and endurance – the five marketing issues at the heart of the introSCAPE framework. The framework covers all aspects of the initiative mix and is designed to lead to actionable advice for marketing managers. For more information visit www.bases.com.

## Nielsen Media Research adds away-from-home viewing measure for college students

Beginning January 29, 2007, the viewing of household members living away from home while attending college will be included in all National People Meter (NPM) audience estimates from Nielsen Media Research. The introduction of Extended Home viewing marks the first time that Nielsen Media Research will include in the ratings viewing by members of sample households living outside the home. Higher-education students are considered members of Nielsen's NPM sample, yet many live away from home for the majority of the time their families are part of the sample. Viewing will be included for students attending traditional colleges and universities as well as trade schools, culinary institutes and other higher-educational facilities.

Viewing by sample students in their dorm rooms or off-campus apartments will be treated as if it were coming from an additional set within their families' sample homes. Their viewing while away at school will contribute to the ratings and viewing levels in the same way that it does when they are in their living rooms and bedrooms in their families' homes. For more information visit www.nielsenmedia.com.

## Briefly

New York research firm Ipsos Insight has introduced Line Evolution, a line optimization solution that takes into account consumer need states, retail space limitations and the reality of stock outages. For more information visit www.ipsos-na.com.

*Random Sample: The Improbable .38* is the first in a series of mystery novels authored by Andrew Greenwood, owner of Greenwood Marketing, a Houston research company. The plot involves a marketing researcher who discovers information that contradicts police reports regarding a murder. For more information visit http://andrewgreenwoodmystery.com.

The Australian Market Research Forum, at www.the-acid-test.com/forum, is a place where Australian research buyers and practitioners can: discuss issues in an open environment; exchange tips; obtain guidance on market research questions; keep abreast of developments in techniques; and browse job opportunities.

Menlo Park, Calif., research firm Knowledge Networks has changed the name of its nationwide online panel to KnowledgePanel.

Focus group video transmission firm FocusVision Worldwide has created a European viewing facilities directory. The directory profiles viewing facilities in five European markets: U.K., Germany, France, Italy and Spain. There are 289 facilities profiled in the directory; 71 are members of FocusVision's global facility network. To receive a complimentary copy, e-mail your contact information to directory @focusvision.com.

Survey Sampling International, Fairfield, Conn., has joined with China research firm CITIC Guoan to establish an online research panel. For more information visit www.surveysampling.com.

## Research Industry News

continued from page 16

Willson, director of online research services at ACNielsen; David St. Pierre, chief technology officer at Greenfield Online; Denis Conway, senior vice president at the NPD Group; Joe Giacobbe, senior vice president at Ipsos; Rick Rodgers, executive director at Carbonview Research.

The **Council for Research Excellence,** an independent forum of media industry researchers created by Nielsen Media Research, will commission a pilot study by Ball State University's Center for Media Design (CMD) to observe how individuals consume traditional and emerging video platforms inside and outside the home.

The study, proposed jointly by CMD and Sequent Partners, a brand and media metrics consultancy, is intended to help media researchers understand the relative positions of video-based media and how people interact with each of them.

To conduct the pilot, researchers will directly observe the minute-by-minute activities of sample participants. These observers will categorize participants' media exposure, life activities, location and attention. The insights derived from the pilot will help researchers assess the viability of a larger project that would be run over a full year which – if pursued – will be designed to inform how different emerging video platforms are approached and prioritized for measurement.

The Council for Research Excellence was created by Nielsen Media Research in 2005, via a dedicated $2.5 million research and development fund, and renewed for an additional $2.5 million earlier this year. It serves as an independent forum for Nielsen to gain greater insights into video viewing habits and to ensure that client priorities are reflected in Nielsen's R&D spending.

**NetRatings Inc.,** New York, announced the expansion of its patent enforcement program and the filing of lawsuits against four companies, alleging infringement of patents owned or controlled by NetRatings. NetRatings has filed complaints in federal courts in the District of Oregon against WebTrends Inc., the District of Minnesota, Fourth Division, against Digital River Inc. and its subsidiary, Fireclick Inc.; and the Southern District of New York against TACODA Inc. The NetRatings patent portfolio, which relates generally to the collection, analysis and reporting of information concerning Internet and/or computer usage and activity, includes United States Patent Nos. 5,675,510; 5,796,952; 6,108,637; 6,115,680; 6,138,155; 6,643,696 and 6,763,386. Several of these patents were asserted in the lawsuits.

Under the company's patent enforcement program, NetRatings has entered into patent licensing agreements with Omniture Inc., Coremetrics Inc., SageMetrics Corp., Unica Corp., and Visual Sciences. In addition, NetRatings has patent infringement suits pending against WebSideStory Inc., WhenU.com Inc., and 180solutions Inc.

### Acquisitions/transactions

**Lightspeed Research**, Basking Ridge, N.J., has acquired the Ultimate Consumer Panel business of **Forrester Research Inc.**, Cambridge, Mass. The Forrester Ultimate Consumer Panel examines consumer credit card, banking statement and transaction data to help understand consumers' financial services behaviors. As part of the acquisition, members of Forrester's Ultimate Consumer Panel business team, including Senior Vice President Gregory Flemming and Business Development Director Melissa Hurley Lynch, have joined Lightspeed and continue to manage the Ultimate Consumer Panel operation.

Germany-based **GfK Group** has acquired a majority stake in the Latvian market research institute **InMind**, based in Riga, which will operate under the name GfK Custom Research Baltic. Gfk also established Riga-based **GfK Marketing Services Baltic**. The new companies in Latvia will coordinate all Baltic projects.

Copenhagen-based **iMotions – Emotion Technology A/S**, which develops emotional response software, has raised $1.7 million in bridge funding to be used to strengthen and expand its organization worldwide. The new investor is Niwa Group, an investment group controlled by Niels Wall.

Netherlands-based **VNU Group B.V**. has completed the sale of its 34.3 percent stake in Solucient, an information products company serving the health care industry, to the **Thomson Corporation**. Terms were not disclosed. VNU announced an agreement to sell its stake in Solucient on September 18, 2006, saying the business no longer was considered a strategic fit with VNU's Marketing Information group, which focuses primarily on the fast-moving consumer goods sector. VNU had been a minority owner in Solucient since 1999, when it formed a joint-venture business with private-equity firm Veronis, Suhler & Associates (now Veronis Suhler Stevenson) that was later renamed Solucient. With the closing of this transaction, Thomson now owns 100 percent of Solucient.

Separately, VNU Group announced in October that it was proposing to acquire the outstanding publicly held minority interest in **NetRatings Inc.** for $16 per share in cash, representing a 10 percent premium over the company's closing price on October 6, 2006, and a 16 percent premium to the six-month average closing price. VNU owns 60.5 percent of the common stock of NetRatings currently outstanding. Following the transaction, NetRatings would become a wholly-owned subsidiary of VNU.

Separately, VNU Group announced that it plans to explore strategic alternatives for its **Business Media Europe** (BME) group, including a possible sale of the business. BME is a Europe-based business-to-business media company.

### Association/organization news

Canada's **Marketing Research and Intelligence Association** (MRIA) has launched a Charter of Respondent Rights, to articulate to Canadians the industry's commitment to respect their time, privacy and to honor the societal contribution they make by voicing their opinions.

The Charter, which sets out nine rights of respondents, is a public expression of the fact that MRIA members must adhere to the association's code of professional conduct that protects the relationship that exists between researchers and the general public.

"Canadians clearly see the value in participating in opinion research – it's an important forum that allows them to express their opinions to government and corporate decision-makers," said MRIA President Nik Nanos in a press statement. "And Canadians recognize how their opinions can help shape new products and services, improve existing ones, and improve customer service; and, by the same measure, how their views can influence laws and public policies.

"Unfortunately, though, there are unscrupulous companies out there that pose as bona fide research companies, and play upon this good relationship in an attempt to sell products or services. With our new MRIA Charter as a declaration of their rights as respondents, Canadians can now better distinguish between legitimate research and fraudulent selling-under-the-guise-of-research."

The Charter encapsulates MRIA's Responsibilities to Respondents standards into one respondent-friendly document, informing research participants of their rights. For example: they will never be sold anything or asked for money; they are entitled to know the approximate duration of the research interview and, if contacted at an inconvenient time, may ask to be re-contacted at a preferred time; and their privacy and the privacy of their answers will be respected and strictly preserved in accordance with the law.

The **American Marketing Association Foundation** (AMAF) named *Managing Customers as Investments: The Strategic Value of Customers in the Long Run* by Sunil Gupta and Donald R. Lehmann as the recipient of the 2006 Berry-AMA Book Prize for the best book in marketing. The book brings together both customer and financial views of marketing, demonstrating a "rigorous yet simple approach to measuring the value of customers, and how to use the results to improve marketing decisions and ROI."

The annual Berry-AMA Book Prize recognizes books whose innovative ideas have had significant impact on marketing and related fields. The following Berry-AMA Book Prize finalists were named as runners-up:

• *Don't Just Relate – Advocate: A Blueprint for Profit in the Era of Customer Power*, by Glen Urban;

• *Effective Advertising: Understanding When, How, and Why Advertising Works*, by Gerard J. Tellis;

• *Hispanic Marketing: A Cultural Perspective*, by Felipe and Betty Ann Korzenny;

• *Return on Customer: Creating Maximum Value from your Scarcest Resource*, by Don Peppers and Martha Rogers; and

• *Social Marketing in the 21st Century*, by Alan R. Andreasen.

The **World Federation of Advertisers** – a network of 55 national advertiser associations – has officially endorsed the development of Project Apollo in the United States. Project Apollo is a proposed marketing information service being developed by **Arbitron** and **VNU** to give advertisers a better understanding of the connection between consumer exposure to advertising on multiple media and their shopping/purchase behavior.

Arbitron and VNU have deployed a pilot panel of more than 5,000 households as a demonstration of the Project Apollo national marketing research service, which would collect multimedia and purchase information from a common sample of consumers. The pilot panel is designed to show advertisers how Project Apollo would enable a better understanding of the link between consumer exposure to advertising on multiple media and their shopping/purchase behavior. Currently six advertisers, along with their advertising agencies, are members of the Project Apollo steering committee, a group of marketers who have signed agreements for the Project Apollo pilot panel data.

**Marketing Research Institute International** and the **University of Georgia Center for Continuing Education**, developers of the Principles of Marketing Research – an online certificate course – have launched an integrated parallel track to the main course entitled Pharmaceutical Supplements. Incorporated directly into the framework of the core course, this industry-focused curriculum was created to meet the needs of marketing researchers working in the pharmaceutical industry. For more information visit www.georgiacenter.uga.edu/is/mrpharma.

## Awards/rankings

Kansas City, Mo.-based **Decision Insight** and **Frito-Lay** won the American Marketing Association's (AMA) 2006 EXPLOR award for their virtual ethnography research. The award, established in 1999, recognizes performance and leadership in online research and acknowledges the most innovative applications of technology. The field of finalists presented their research case studies at breakout sessions during the AMA's Marketing Research Conference in Chicago in September. Decision Insight and Frito-Lay were announced the winning team during the general session on the final day of the conference and submitted an encore presentation of their case study.

Presented jointly by Frito-Lay's strategy and insights team, led by Michelle Adams and Melanie Leach, and Decision Insight's Brad Barash, the winning presentation – entitled "Virtual Ethnography: Predicting and Understanding Shopping Behavior (In Hyperdrive)" – provided an in-depth look at the opportunity for the snack maker to combine a simulated shopping model and ethnography techniques to speed up consumer learnings and strengthen research's role in understanding consumers' decision-making process.

The team used Decision Insight's qualitative-quantitative solution, SimuShop Plus, to develop a research platform with in-depth, one-on-one chat sessions to uncover the "why" behind purchase selection. The sessions, in partnership with iModerate Research Technologies, resulted in numerous insights for Frito-Lay.

**Greenfield Online Inc.**, Wilton, Conn., has been named to Deloitte's Technology Fast 50 Program for the Connecticut Region, a ranking of the 50 fastest-growing technology companies in the area by Deloitte & Touche USA LLP. Rankings are based on the percentage revenue growth over five years from 2001 to 2005.

New York-based researcher **TNS** has received the 2006 Microsoft Vendor Program (MSVP) Excellence Award in the service category. TNS is the first market research company to have won the MSVP Excellence Award for service. In addition to this award, TNS received nominations in the quality category and was one of three finalists for overall Microsoft Vendor of the Year.

Research process outsourcing firm **Pulse Group** won the 2006 APICTA Award, an international program governed by a network of 16 Asian economies to provide a platform to recognize innovators and entrepreneurs in the information and communications technology sector.

Seattle-based **Global Market Insite Inc**. ranks No. 4 on Deloitte's Technology Fast 50 Program for the Pacific Northwest, a ranking of the 50 fastest-growing technology, media, telecommunications and life sciences companies in Washington, Oregon and Idaho by Deloitte & Touche USA LLP. Rankings are based on the percentage revenue growth over five years, from 2001 to 2005.

## New accounts/projects

**Buckley Radio** has entered into a multi-year agreement for **Arbitron's** radio ratings services that include Portable People Meter audience measurement services when deployed in New York.

Norway-based research software company **FIRM** announced that **Bernett Research,** Boston, has licensed the Confirmit survey, community panel and report platform.

## New companies/new divisions/relocations/expansions

Portland, Ore., research firm **Doxus** announced plans to open an office in China in 2007. Doxus China will be led by David Ying Hong Ho.

**AllPoints Research Inc**. has moved to a new location at 200 West First St., Suite 100, Winston-Salem, N.C., 27101.

Research firm **Kadence** has opened Kadence Research India, a full-service operation, in Delhi. The office launches with a senior team of three directors, headed up by Aman Makkar, who becomes managing director of Kadence Research India.

A new research company, **Forefront Consulting Group**, has been founded by Kristin Luck and Ji Yeong Kim. Its offices are located at 1106 N. Hudson Ave., Hollywood, Calif., 90038. Phone 866-866-8016.

**Behavioral Insights LLC** has moved to 800 Westchester Ave., Suite N319, Rye Brook, N.Y., 10573. Phone 914-253-8228. Fax 914-253-8278.

## Company earnings reports

In results for the second quarter of 2006, Netherlands-based **VNU** Group reported operating revenue of EUR 943 million for the three months ended June 30, 2006, an increase of 6 percent in constant currency over the prior year. The 2006 amount excludes a EUR 71 million reduction in revenue due to the preliminary purchase price allocation (the "deferred revenue adjustment") related to the sale of the company to a group of private-equity investors on May 24, 2006. Operating revenue, including the deferred revenue adjustment, was EUR 872 million, up 2 percent including a favorable impact from foreign-currency translation.

VNU said its pro forma operating income for the second quarter was EUR 114 million, up 11 percent in constant currency, before items related to the sale of the company and excluding book gains in 2005. Including these items, VNU had a second-quarter operating loss of EUR 6 million, compared with operating income of EUR 101 million last year. The 2006 result includes EUR 34 million of transaction costs related to the sale of the company and a negative impact of EUR 71 million from the deferred revenue adjustment, among other smaller items. Operating income in 2005 benefited from a EUR 5 million gain from the disposition of an equity investment.

Summarizing its performance for the second quarter, the company said it continues to see good growth from expanded retail measurement, consumer panel and television audience measurement services, from new client initiatives and new products, and from U.S. trade shows and certain print and online media in Europe. The company noted that business was soft for ACNielsen in the U.S., and that its trade magazines continued to face a tough advertising climate in the U.S. and Europe.

For the first six months of 2006, pro forma operating revenue was EUR 1,833 million, up 5 percent in constant currency from operating revenue of EUR 1,648 million in 2005. The 2006 amount excludes the deferred revenue adjustment of EUR 71 million described earlier. Including this adjustment, operating revenue was EUR 1,762 million, up 1 percent in constant currency. Pro forma operating income for the first half of 2006 was EUR 185 million, up 13 percent in constant currency, before items related to the sale of the company and excluding book gains in 2005. Including these items, operating income was EUR 21 million, compared with operating income of EUR 159 million in 2005. Operating income in 2006 was reduced primarily by EUR 78 million of transaction costs related to the sale of the company and EUR 71 million as a result of the deferred revenue adjustment. First-half 2005 results include a EUR 11 million book gain from the disposition of certain businesses.

For the third quarter 2006, ended September 30, **Arbitron Inc.**, New York, reported revenue of $90.7 million, an increase of 6 percent over revenue of $85.6 million during the third quarter of 2005. Planned spending on the Portable People Meter and Project Apollo initiatives along with the required expensing of share-based compensation contributed to increased costs and expenses for the third quarter of 7.8 percent, from $52.7 million in 2005 to $56.8 million in 2006.

Arbitron's equity in the net income (loss) of its affiliate, Scarborough Research, declined from $193,000 in the third quarter 2005 to a loss of $1.8 million in the third quarter of 2006. This decline is due primarily to changes in the delivery schedule for Scarborough market reports.

Earnings before interest and income tax expense (EBIT) for the quarter were $32.1 million, a decrease of 3 percent over EBIT of $33.1 million during the comparable period last year.

Net income for the third quarter decreased by 3.4 percent from $20.9 million in 2005 to $20.2 million in 2006.

Net income per share for the third quarter 2006 was $0.68 (diluted) compared with $0.66 (diluted) for the third quarter 2005. The increase in net income per share for the third quarter relative to the decrease in net income for the quarter is attributable to a reduction in shares outstanding due to the company's repurchase of its shares in the first half of 2006.

For the nine months ended September 30, 2006, revenue was $250 million, an increase of 6.5 percent over the same period last year. EBIT was $73.1 million, compared to $84.4 million in 2005. Net income for the nine months was $45.7 million or $1.51 per share (diluted), compared with $56.1 million or $1.77 per share (diluted) during the comparable period last year.

**IMS Health**, Fairfield, Conn., announced third-quarter 2006 revenue of $482.7 million, up 12 percent (10 percent constant dollar), compared with revenue of $432.8 million for the third quarter of 2005.

Third-quarter 2006 diluted earnings per share on a GAAP basis was $0.34, compared with $0.30 in the prior year, up 13 percent. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, earnings per share was $0.39, a 15 percent increase, compared with $0.34 per share in the same period last year. Including the expensing of equity-based compensation, adjusted (non-GAAP) earnings per share for the third quarter was $0.36, up 6 percent.

Net income on a GAAP basis was $69.3 million, compared with $71.1 million in the year-earlier quarter, a 3 percent decline. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, net income for the 2006 third quarter was $79.4 million, compared with net income of $80.6 million in the prior year, down 1 percent. Including the expensing of equity-based compensation, adjusted (non-GAAP) net income for the third quarter of 2006 declined 9 percent to $73.5 million.

Operating income in the third quarter of 2006 was $115.4 million on a GAAP basis, up 13 percent, compared with $102.2 million in the year-earlier period. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, third-quarter operating income was $123.8 million, up 12 percent on both a reported and constant-dollar basis, compared with $110.7 million in the year-earlier period. Including the expensing of equity-based compensation, adjusted (non-GAAP) operating income in the 2006 third quarter was $115.4 million, up 4 percent reported and constant dollar, over the prior year.

For the first nine months of 2006, revenues were $1,415.1 million, up 11 percent (12 percent constant dollar), compared with revenue of $1,277.1 million in the year-earlier period. Diluted earnings per share on a GAAP basis for the first nine months of 2006 was $1.20, compared with $0.84 in the prior year. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, earnings per share for the first nine months of 2006 was $1.11, a 13 percent increase, compared with $0.98 per share in the same period last year. Including the expensing of equity-based compensation, adjusted (non-GAAP) earnings per share for the first nine months of this year was $1.01, up 3 percent. Net income on a GAAP basis for the 2006 first nine months was $250 million, compared with $194.7 million in the year-earlier period. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, net income for the first nine months of 2006 rose 2 percent to $230.8 million, compared with net income of $226.5 million in the same period last year. Including the expensing of equity-based compensation, adjusted (non-GAAP) net income for the first nine months of 2006 was $209.6 million, down 7 percent.

For the first nine months of 2006, operating income was $318.5 million on a GAAP basis, a 5 percent increase, compared with $302.4 million in the year-earlier period. On an adjusted (non-GAAP) basis and excluding the expensing of equity-based compensation, operating income for the first nine months of 2006 was $354.6 million, an 11 percent increase (12 percent constant dollar), compared with $318.3 million in the year-earlier period. Including the expensing of equity-based compensation, adjusted (non-GAAP) operating income in the 2006 first nine months was $324.5 million, up 2 percent on both a reported and constant-dollar basis over the prior year.

Adjusted (non-GAAP) results for the 2006 first nine months exclude certain pre-tax income items totaling $37.3 million, primarily from the terminated VNU merger, as well as certain net tax provisions of $3.1 million. For the first nine months of 2005, results on an adjusted (non-GAAP) basis exclude certain items including a one-time tax charge of $39.5 million related to repatriating $647 million of previously undistributed foreign earnings under the American Jobs Creation Act.

## Names of Note

continued from page 12

*Company* has created a corporate marketing function. **Pat Burns,** currently vice president of strategic planning and new business development, has assumed responsibility for corporate marketing in addition to his current responsibilities. His new title is vice president of marketing and strategy. Marketing research will be among his new responsibilities.

Santa Ana, Calif., information firm the *First American Corporation* has named **Sandra Bell** vice president and chief marketing officer. Marketing research will be among her new responsibilities.

*InsightExpress*, Stamford, Conn., has named **Megan Rome** senior director, marketing. **Jeff Porper** has joined the company as Webmaster, **Vlad Olkov** as Internet developer and **Mike Beaudwin** as desktop support technician.

Research firm *J. Reckner Associates Inc.,* Montgomeryville, Pa., has named **Janet Fisher-Hughes** research director. Also **Meredith Falvo** has joined the firm as facility manager for its White Plains, N.Y., facility.

*Qwest Communications International Inc.*, Denver, has named **Laura**

**Sankey**

**Sankey** executive vice president of marketing and communications. Marketing research will be among her new responsibilities.

U.K. research software firm *Pulse Train* has appointed **Louis Davidson** to its board as its new commercial and finance director.

Tulsa, Okla.-based real estate auction firm *Williams & Williams* has named **Fontana Fitzwilson** vice president of corporate research and retail marketing.

Research firm *Burke, Inc.*, Cincinnati, has named **Brian White** senior account consultant in sales and client services.

**Michael Mermelstein** has been named president of the national omnibus poll of Alexandia, Va., research firm *RT Strategies*.

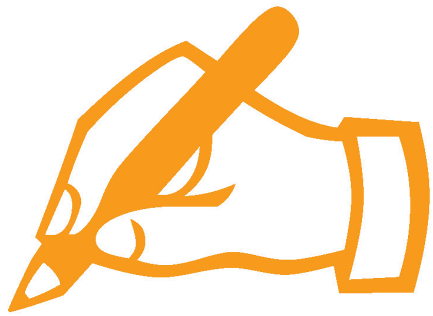
Munich-based researcher *Ciao* announced a number of promotions: **Richard Thornton** to vice president client development for the U.K. and Ireland, Australia and Southern Europe, including France; **Emmanuel Bertrand** to senior marketing director, Ciao Internet survey solutions; **Bernd Hacker** to vice president client development for Germany, Austria, Switzerland, the Benelux and the Nordic countries; **Christophe Deguignet** to director client development for Southern Europe (France, Italy and Spain); **Tom Meyritz** to head of new channel development for Europe. In addition, **Cyril Stern** has been added as director of panels and **Leslie Abell** has been named director of global pricing strategy.

Market research and advisory services firm *Manufacturing Insights,* Framingham, Mass., has named **Kimberly Knickle** research program director.

**Francis Eames** has been named group marketing director at London-based research firm *TNS*. **Matthew Froggatt** has been appointed as global sector head of TNS' technology division.

*Global Market Insite Inc.*, Seattle, has named **Michael Vernon** chief financial officer and **Judy Loucks** vice president of human resources.

At the Los Angeles office of *Lieberman Research Worldwide,* **Barbara Tenney** has been named vice president, entertainment and media.



# index of advertisers

## Trade Talk

continued from page 86

ness to the customer. More than half of its outlets are exclusive Bang & Olufsen distributors.

• *Fashion designers*

One of the gems in Gucci Group's crown, Bottega Veneta, earns the Luxury Institute's highest Luxury Brand Status Index score in fashion. Customers who know Bottega Veneta rate it highest in quality, uniqueness and exclusivity, and say it is the brand most used by people who are admired and respected. They also say that it is the brand most able to make its customers feel special and that it is the most worthy of a significant price premium. Armani and Hermès round out the top three most prestigious fashion designer brands.

• *Luxury fragrances*

Among the favorites for wealthy men are Boucheron Pour Homme eau de parfum, Cartier Santos Concentrée and Jaipur Homme by Boucheron. Cartier fragrance brands for women are among the most esteemed brands, including Le Baiser du Dragon and Panthère. Angel by Thierry Mugler earned a high brand status ranking from the wealthy.

• *Accessories*

Diamonds are indeed a girl's best friend, especially if they're from Harry Winston. The New York jeweler finishes first in all four critical metrics of luxury brand prestige: consistently superior quality, uniqueness and exclusivity, social status and the ability of the brand to make customers feel special throughout the entire customer experience. Tiffany and Cartier tie for second place, while Japanese pearl specialist Mikimoto comes in third.

Among 17 brands of watches whose top offerings retail for $50,000 and higher, wealthy Americans have particularly high regard for Franck Muller and Patek Philippe, two brands earning the highest rankings in the category. Other especially prestigious brands in the eyes of the wealthy: Vacheron Constantin, Audemars Piguet and Breguet.

Fine pens are popular gifts for friends or business associates. For those trying to spell status and exclusivity, the best bet is with the Ducati and Jaguar offerings from Italian firm Aquila. Other options include Montblanc, which earned top marks for delivering consistently superior quality, and Tiffany, which wealthy consumers say does the best job of making them feel special throughout the customer experience.

• *Travel*

The desire of high net-worth individuals to get away for a memorable vacation is driving sales of high-end adventure travel, truly a niche for the rich. In this category, Abercrombie & Kent, a market pioneer, is the most prestigious tour operator, followed closely by Tauck World Discovery and Wilderness Safari.

Despite its rapid expansion over the past several years, Ritz-Carlton is still tops in hotel brand prestige among the wealthy, edging out Peninsula. Small Luxury Hotels of the World and Four Seasons tied behind Peninsula in the ranking of 19 leading luxury hotel brands. Particularly impressive for the category as a whole, and for Ritz in particular, is that the luxury hotel business gets the highest marks of all luxury industries in terms of product, customer service, innovation and trust.

Cruises make good gifts to give and receive. When faced with a question of carriers, the wealthy prefer smaller lines like Seabourn, Silversea and Lindblad. Seabourn steamed to a first-place finish, just ahead of Silversea. The overall winner in 2005, Lindblad, also finishes among the top three brands.

Taking off to Las Vegas to wager some of the year-end bonus? If you're wealthy, you'll probably run into your peers at Bellagio or the Wynn. If Atlantic City is your destination, you're likely to land at the Borgata. | Q

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By Joseph Rydholm
*Quirk's* editor

# If you have to ask, you can't afford it

With the holiday season in full swing this month, I took special notice of some information I received from Milton Pedraza, CEO of the Luxury Institute, a New York research firm that focuses the consumption habits of the very rich.

Based on the firm's research, here are some of the au courant faves of wealthy consumers for this year's gift-giving/receiving, as taken from the firm's press release.

• *Automobiles*

Porsche has pulled ahead of the pack in terms of overall brand prestige, as ranked on the Luxury Institute's Luxury Brand Status Index (LBSI). Gifts from Mercedes or Lexus would not disappoint either: The two brands round out the top three most prestigious brands in the automotive category.

For wheels selling north of $100,000, Rolls-Royce rolled one spot higher from 2005 to overtake Maybach as the most prestigious ultra-luxury auto name. Maybach ceded all but one of the pillars of luxury brand status to Rolls, but it topped the list of 10 ultra-luxury makes in social status. Bentley also finished near the top of the rankings, and is the brand that the wealthy are most likely recommend to family and close friends.

• *Home appliances*

Kitchen renovations are among the most popular home improvements, and in this important area, a handful of brands dominate. California's Wolf Range is the top-ranked home appliance brand. Britain's AGA and Germany's Gaggenau rank second in the LBSI for home appliances, followed by Viking and Sub-Zero.

• *Home furnishings*

Among the multitude of the most highly esteemed brands offering items to furnish and decorate the home are extensions of famous fashion houses. Armani Casa, Maitland-Smith and Stickley are the top brands according to America's wealthy. Also in the top 20 percent are Fendi Casa, Pierre Deux and Roche Bobois.

• *Glassware*

If you're contemplating a gift of crystal, be advised that Lalique enjoys the best reputation among ultra-wealthy consumers who know the storied French brand. Another French brand, Baccarat, finished second overall, followed closely by Steuben and Christofle.

• *Fine china*

Hungary's Herend Porcelain is the brand that stands head and shoulders above its peers and, according to wealthy consumers, is the brand with the most improved image in the past year. Hermes and Waterford round out the top three fine china brands, followed by stalwarts like Cartier, Tiffany and Rosenthal.

• *Consumer audio*

When wealthy audiophiles want to listen to music, they are especially pleased to do so with an audio system from Bang & Olufsen. The Danish company edged out Bose for the highest ranking in consumer audio, followed by Nakamichi.

• *Consumer video*

Even more impressive for Bang & Olufsen, the company is also the brand image leader in consumer video. Nakamichi, a runner-up in the consumer audio category, finished along with Sony among the top three brands (out of 25) in consumer video. Perhaps a big part of Bang's well-regarded image is a result of its close-

continued on page 85


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