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news and notes on marketing and research



Dr Pepper digs up some trouble

Dr Pepper issued an apology for hiding a gold coin in a historic burial ground in Boston as part of a larger treasure hunt promotion, and planned to make a donation to the cemetery, as reported by PROMO Xtra's Patricia Odell in February.

City officials were alerted to treasure hunters looking for the coin when the players called to complain that the cemetery was closed to the public and they couldn't get in. The hidden coin was part of the Hunt for More contest, in which 23 gold coins worth \$1.7 million were buried in cities in the U.S. and Canada. "The coin should never have been placed in such a hallowed site, and we sincerely apologize," Greg Artkop, a spokesman for Dr Pepper, said in a statement.

City park officials shut down the graveyard and posted security there. Dr Pepper canceled the Boston part of the promotion and then announced the following day that the top prize, a \$1 million coin, had been found in Sam Houston Park in Houston.

In addition to issuing an apology, Dr Pepper is covering the costs of the additional security at the Granary Burying Ground, estimated at \$500. The company is also making a \$10,000 donation, the value of the coin hidden there, to the cemetery for its time and trouble, Artkop said. For those players in Boston, a separate drawing was to be made to award a \$10,000 prize.

The coin hidden in the cemetery was retrieved by a private investigator hired by one of two marketing agencies involved in the campaign, Promotion Watch, based in Livonia, Mich., according to news reports.

In the wake of January's disastrous Cartoon Network promotion, which caused bomb scares and set nervous residents on edge, Boston Mayor Thomas M. Menino said alternative marketing can continue in the city, but not without the knowledge of City Hall. Boston officials were not notified of Dr Pepper's or Cartoon Network's plans, according to news reports.

"Dr Pepper Says Sorry for Botched Boston Promo, Donates Money," PROMO Xtra, February 27, 2007

Pharma MR workers less comfortable with Web

Market researchers who work at research agencies are more comfortable using the Internet for their research studies than their corporate counterparts, says a report by New York research firm Medefield America.

In the study, comfort and perceived credibility of online research both ranked higher among research agencies, which conducted 63 percent of their quantitative research online, while manufacturers, during the same period, used the Internet for 43 percent of their surveys. In addition, agency professionals credited the Internet with providing higher quality data than phone interviews.

The new report is based on a comparison of the 2006 Market Research Trends Study - which analyzed responses from 122 market research executives at 20 global pharmaceutical and biotech manufacturers - and a separate study, conducted simultaneously, with 107 professional market researchers at agencies around the world.

"We wanted to see how perceptions and attitudes at agencies differ - if at all - from those of their counterparts at pharmaceutical companies," said Elys Roberts, president of Medefield America. Comfort level, while greatly improved on the company side, is still about 14 percent lower than at agencies, a figure that appears to correlate closely with experience, Roberts said.

"Agency people tend to have been in the field longer. Often they've made a career of research, with relevant graduate qualifications. On the pharmaceutical side, the researcher is more likely to come from a background in one of the other disciplines, such as marketing or sales, and be serving a relatively brief rotation in research."

Some pharmaceutical staffers are motivated to continue using the phone - even when they are aware of the benefits of Internet data collection - in order to keep their studies consistent. One way to make the transition, suggested Roberts, would be for pharmaceutical researchers to take a test-and-control approach, using both an Internet and phone sample, to see whether the two methodologies yield any differences in response patterns. Typically there is very little difference and when researchers can see this kind of comparative data they tend to be more comfortable making the switch.

The bigger the ad, the better the impact?

According to the report, Do Spectacular Ads Generate Spectacular Results?, by New York-based GfK Starch Communications, both recognition and readership of ad copy rise as the number of pages increases.

The study, commissioned by Time Inc., reviews the average readership of "spectacular" ads including multi-page units, gatefolds, inserts and scented strips and offers insights into their performance across three key categories: noted - the percentage of readers who remember seeing the ad; associated - the percentage of readers who recall seeing the name of the advertiser or product; and read most - the percentage who read half or more of the copy.

The report features readership data on several innovative ads that extend beyond the two dimensions of the typical print ad. For example, a hair conditioning ad for Clairol Herbal Essences with Hawafena is a four-page insert. Upon opening the ad, the reader is greeted with a brief audio clip of Handel's Hallelujah chorus, employing the name of the new product ingredient, hawafena, in place of hallelujah. According to the report, "Readership scores for the hawafena ad are extraordinary and 100 percent of the publication's readers noted, associated and read some of the ad."

"It's clear that sheer tonnage does matter - increasing the number of pages or altering the size and weight of the page increases the probability that an ad will be seen and read," said Philip W. Sawyer, senior vice president and director of GfK Starch Communications. "When that added weight is combined with technological innovation and creativity, the results can be truly spectacular."

The study also investigated the extent of reader recognition and involvement with scented-strip ads, used primarily by fragrance companies. The report reveals that although recognition of scented-strip ads is only slightly higher than comparable two-page spread ads without a scented strip, readership of body copy of scented-strip ads increased by 136 percent. "The data strongly suggests that women tend to be highly involved with scented-strip ads," Sawyer said. For a complete copy of the report send an e-mail to info@gfkamerica.com or call 212-240-5300.

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Happiness, as defined by the world

The United States is expected to maintain its slow but steady growth in the global economy in 2007 with consumers' overall opinion on their personal lives becoming slightly more upbeat, according to San Diego-based Luth Research's IndicatorEDG, a quarterly online study surveying a total of 6,000 respondents around the world. The comparison of eight key



regions of the global market also indicates that consumer optimism continues to be vibrant in India, China and Scandinavian countries, with a 50 percent lead over the U.S., U.K., Europe (mainland) and Japan. (Findings about India and China should be considered with caution as these reflect primarily the facts and views of the more affluent and influential segments due to the still-limited Internet penetration in the two countries. And, due to a small sample size, the findings for Japan are not conclusive but nevertheless are likely indicative of general opinions in that country.)

People in the U.K., Europe and Japan are most likely to say their life

would be the same in 2007. What are the driving factors behind this disparity in consumer confidence and sentiments? The tracking study points to a few indicators within the local cultural and economic dynamics.

- **Defining happiness:** With increasing interactions between the members of the global village, the nascent trends in the local market have subtle but intrinsic differences. Children and family are notably more important to the Chinese and Scandinavians than to people from other regions. While people from Western countries strive for physical fitness and active lifestyles, those from China and Japan value good health in a general sense. A good marriage also remains in the top five ingredients for happiness, but is more essential to Americans and Canadians.

When it comes to the specific things that make us happy, we are globally similar; we draw the most satisfaction from our family life,

Although people's satisfaction with their residency and community is comparable across countries, people from the U.K. and Europe are more inclined to live in another country and Americans are the least inclined to do so.

- **Time and money:** The universal theme is the desire for sufficient time and money to be content. Yet, the way consumers are spending their time and energy differs vastly across the globe. The British spend the most time with their spouse or partner – an average of 50 hours per week. As for professional endeavors, people in India and China work the most hours during a typical week (an average of 44 hours), while those in the U.K. only average 24 hours. Workers in Scandinavian countries and Canada also work fewer hours, averaging 23 hours in a typical week. This gap in work hours between regions is expected to widen in 2007 and the following years.

Financially, people in India and China are saving more and spending

Table 1: Top five picks for definition of happiness

Happiness (Ranking 1 = Most Selected)	U.S.	U.K.	India	Canada	Europe (mainland)	Scandinavia	China	Japan
Being physically fit and active throughout my life	2	2	1	1	1	2	5	3
Enjoyment, fun and laughter throughout my life	4	4				5	3	5
Good health throughout my life				5		1	2	1
Having a wonderful and lasting marriage	2	3	4	2	5	3	4	
Having children and a happy family	5	5	5	4	4	1	1	
Having enough time and money to be content	1	1	3	3	2	2		2
Having enough time to enjoy all that life has to offer	3		2	3	3	1	1	4
Having good friends and good times						4		

Table 2: Source of happiness

Source of happiness (Ranking 1 = Most Happy)	U.S.	U.K.	India	Canada	Europe (mainland)	Scandinavia	China	Japan
My current residence	3	2	2	3	2	3	3	1
My community	2	3	3	2	3	2	4	3
My family life	1	1	1	1	1	1	1	2
My romantic life	5	4	4	5	5	5	2	5
My work life	6	6	6	6	6	6	5	6
My social life	4	5	5	4	4	4	6	4

which is a dramatic shift from 20 years ago when satisfaction was primarily associated with success in the professional realm. Work life is becoming a markedly low priority and source of happiness in the lives of consumers around the globe.

one extra hour per week managing their personal finances than people residing elsewhere. Individuals in the U.K. and Scandinavian countries spend the least amount of time (1.5

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names of note

Wendy's International Inc., Dublin, Ohio, has named **Paul Kershisnik** senior vice president of marketing strategy and innovation.

Susan Sirmons has been named vice president of marketing for the *Asbury Park Press*, the *Home News Tribune*, the *Ocean County Observer* and the *Times Beacon* newspapers in New Jersey. Marketing research will be among her new responsibilities.

Braxton Haulcy has joined Woodbury, Minn., research firm *SmartRevenue* as account director.

Jonathan Spector, vice dean of the Wharton School at the University of Pennsylvania, was named president and CEO of *The Conference Board*.

Victoria, Australia research firm *Insight Marketing Systems* has named **Simon Barker** European director for its Research Reporter application.

San Francisco research firm *MarketTools* has appointed **Steve Cakebread**, chief financial officer of salesforce.com, to its board of directors.

Research consulting firm *Cambiar LLC* has expanded its services into the area of sales performance and tapped **Bill Guerin** to lead the new practice.

The Nielsen Company has named **Mitchell J. Habib** executive vice president, global business services and added **Brian J. West** as chief financial officer. In addition, **Jeff Boehme** has been tapped to direct business development for Nielsen DigitalPlus, which oversees the company's initiatives for digital set top box data.

Cambridge, Mass., research firm *Abt Associates* announced that Senior Vice

President **Richard A. Kulka** has assumed corporate oversight of the company's survey methodology and data capture group. In addition, **Steven Sinding** has joined the Abt Associates board of directors.

Dallas research firm *e-Rewards* has named **Ben Hogg** vice president of sales - Europe, based in London.

Bellomy Research, Inc., Winston-Salem, N.C., has promoted **Reggie Pasterczyk** to vice president - client



Pasterczyk

Messina

service and added **Dina Messina** as research associate.

U.K. research firm *Illuminas Global* has named **Matthew Carr** director, responsible for Asia-Pacific and China. He will be based in Hong Kong.

Lightspeed Research, Basking Ridge, N.J., has named **Antonio Yenidjeian** chief information officer.

U.K.-based *Taylor Nelson Sofres plc* has named **Dawn Airey** and **Drummond Hall** independent non-executive directors.

TNS Media Research, New York, has named **Jeff Sohinki** director of business development.

Arbitron Inc., New York, has named **Pat Pellegrini** to the new position of vice president, research, new product development. The firm also named **Jeanette Schaller** as its first customer service representative for its

national radio services team.

Patrick Keane has been named chief marketing officer of *CBS Interactive*. Marketing research will be among his new responsibilities.

Salem, Mass.-based *King Fish Media* has named **Gordon Plutsky** director of marketing and research. Plutsky will be responsible for building and communicating the King Fish brand and will be launching King Fish Research in the coming months.

Sam McGuire has joined the *Ipsos North American* public affairs management team as senior vice president, based in New York City.

Information Services Group Inc., Stamford, Conn., announced the members of its leadership team and board of directors. Joining **Michael P. Connors**, chairman and chief executive officer, are **Frank D. Martell**, executive vice president and chief financial officer; **Earl H. Doppelt**, executive vice president and general counsel; **Richard G. Gould**, executive vice president; **Francis B. Barker**, senior advisor, mergers and acquisitions; and **Barry Holt**, senior advisor - communications. The board of directors, in addition to Connors, is: **Robert J. Chrenc**, who most recently served as non-executive chairman for Symbol Technologies; **R. Glenn Hubbard**, dean of Columbia University's Graduate School of Business and **Russell L. Carson** Professor of Finance and Economics; and **Robert E. Weissman**, former chairman and CEO of IMS Health, Cognizant Corporation and The Dun & Bradstreet Corporation.

San Francisco research firm *Questus* has named **Andrea Pimentel** art

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product and service update

Java app minimizes Web, WAP time for surveys

Australia-based Absolute Data Group is now offering Broadcaster, a Java-driven mobile phone application that allows companies to send updatable, menu-driven applications such as a survey to a consumer's mobile phone, without using Web browsing or WAP. The application resides on the mobile device (cell phone, BlackBerry, etc.) after the user responds to an SMS message. The Internet is only accessed to download the application and to upload information (such as responses to multiple choice, numeric or text-based questions) back to the host company's application. This saves the user both time and money and encourages participation. It also allows research to be conducted over a period of time if needed, with no hindrance to the mobile device user.

For marketing agencies or in-house marketing departments, marketers access a content-

authoring program via the Web and create content for the consumer. They create a new application by inserting text and graphics or can make a new version of an existing application.

When a consumer sees the SMS code on marketing or point-of-sale material, for example, they send an SMS and within a few seconds they receive a link to an application that resides on their mobile device. Once the application is installed, SMS is no longer used. The application communicates with the content owner's Broadcaster application via HTTP over GPRS. For more information visit www.broadcastermedia.com.

New online FG platform from Itracks

A new online focus group platform from Saskatoon-based data collection firm Itracks is designed to offer qualitative researchers greater flexibility and control over their online market research. The interface has been reorganized to make better use of screen space

for a researcher's purpose. The focus is on the chat frame, which contains the real-time discussion among research respondents and the moderator. Moderator tools for guiding the discussion are more readily accessible, such as quick mod guide posting, respondent demographic review and secure communications channels. Breakout sessions are now possible. Researchers can move subsets of their group to separate rooms to discuss concepts or stimuli and then bring them back to the main group. For more information visit www.itracks.com.

New retail analysis products from IRI

Chicago-based IRI has added two new solutions to its Consumer-Centric Retail Execution suite. The first, IRI Customer Analytics Suite, is a collection of offerings that marry proprietary modeling techniques with practical business applications. It relies on a collaborative process to develop an integrated segmentation framework that is customized for each business. The analysis addresses the following areas: behavioral segmentation, trip missions (information about different shopping occasions that shoppers take, from restocking to a fill-in trip to an emergency stop), trip opportunity (the why behind the buy), store clustering, investment analysis, roadmapping and key performance indicators.

The second, IRI Retail Drivers Suite, is a set of analytic solutions that measures consumer responses to various marketing levers to support retail decision-making. The suite is comprised of the following services: IRI Perimeter Drivers, which provides retailers



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News notes

New York-based **GfK Custom Research North America** has completed the integration of its companies in the U.S. and Canada, remapping based on sectors and practice areas. Under the GfK Custom Research North America umbrella are ARBOR, Allison-Fisher International, Caribou Lake, Custom Research Inc. and NOP World (U.S.). GfK Research Dynamics, its custom research company in Canada, will continue to function as a stand-alone entity. New sectors include GfK Automotive, GfK Consumer, GfK Financial Services, GfK Media & Communications and GfK Technology. Practice areas consist of GfK Roper Consulting, GfK Roper Public Affairs & Media, GfK Brand &

Communications, GfK Customer Loyalty and GfK Qualitative & Ethnography as well as a research center of excellence.

Norway-based research software maker **Future Information Research Management (FIRM)** has changed its name to Confrimit as part of the company's ongoing focus and commitment to its flagship Confrimit platform.

Arbitron Inc., New York, has concluded a round of testing using the Portable People Meter (PPM) system to detect audio content broadcast in malls by Mall Radio Network. The project represents the first successful attempt to encode and monitor audio content broadcast

within a mall environment. During the Houston PPM demonstration, Arbitron has successfully tested the PPM within individual retail establishments. This is the first trial that tracked exposure to audio played in the common areas of the mall outside individual stores.

Harris Interactive, Rochester, N.Y., was awarded a business method patent (U.S. Patent No. 7,171,567) entitled "A System for Protecting Information over the Internet." This technology, incorporated in a proprietary suite of security products known as ConceptLoc, enables secure distribution and copy protection of images and video embedded in online surveys, as well as the text that may appear with those images.

Dallas research firm **eRewards Inc.** recognized 48 employees who achieved Professional Researcher Certification from the Marketing Research Association.

Acquisitions/transactions

London-based **TNS** has acquired **Sorensen Associates**, a Troutdale, Ore., research firm specializing in understanding shopper behavior, as part of its new global practice, TNS Retail and Shopper Insights. In a related move, TNS has also acquired Retail Forward Inc., a Columbus, Ohio consulting and research firm.

TNS Media Intelligence, New York, has acquired **Cymfony**, a market influence analytics company based in Watertown, Mass. Cymfony staff will join the TNS Media Intelligence organization, and remain at their present location. The new TNS Media Intelligence unit will be known as TNS Media Intelligence/Cymfony.

Calendar of Events May-July

The Greater New York/Philadelphia Chapters of the Marketing Research Association will hold their annual joint conference on May 10-11 at the Park Hyatt Philadelphia at the Bellvue. For more information visit www.mra-net.org.

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

The Marketing Research Association will hold its annual conference on June 6-8 at the Hyatt Embarcadero Hotel in San Francisco. For more information visit www.mra-net.org.

The American Marketing Association will hold its annual Advanced Research Techniques forum on June 10-13 at the Eldorado Hotel, Santa Fe., N.M. For more information visit www.marketingpower.com.

Canada's Marketing Research and Intelligence Association will hold its annual conference on June 13-15 at the Blue Mountain Resort Village Conference Centre, Collingwood, Ontario. For more information visit www.mria-arim.ca.

IIR will hold its Market Research Event Europe on June 18-20 at the Hotel Fira Palace, Barcelona, Spain. For more information visit www.iirusa.com/euroresearch.

ESOMAR will hold a conference on innovation on June 18-20 in Helsinki. For more information visit www.esomar.org.

ESRI will hold its user conference on June 18-22 at the San Diego Convention Center. For more information visit www.esri.com.

ESOMAR will hold its Brand Matters conference on June 20-22 in Helsinki. For more information visit www.esomar.org.

IIR will hold its SCOPE (segmentation, clustering, optimization, profiling, efficiency) event on June 25-27 at the Omni Chicago. For more information visit www.iirusa.com/scope/2253.xml.

IIR will hold its Shopper Insights in Action conference on July 11-13 at the Marriott Downtown Chicago Magnificent Mile. For more information visit www.iirusa.com.

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.

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Tear down the wall between you and your consumers

I was recently part of a discussion surrounding innovation in qualitative research. Some participants immediately began talking about how the Internet will reshape the way qualitative research is conducted. They pointed to the rising popularity of blogging and social networking and argued that since we can tap into the “honest” opinions provided through these outlets, the face of qualitative research will be changed forever.

In my view, however, their impact will be evolutionary, not revolutionary. Having lived through the introduction of other killer apps in the qualitative space (online focus groups, bulletin-board discussion groups) I felt that while these emerging tools have the potential to be valuable, they will simply become additional tools to be used at our disposal. Therefore, I expressed a different point of view: Innovation in qualitative research will have less to do with technology and more to do with Pink Floyd.

Being accustomed to the blank stares I almost always receive when trying to be a bit provocative, I asked all in the discussion if they were familiar with Pink Floyd’s *The Wall*. Most agreed that they were familiar with at least the more popular songs on the album (“Another Brick in the Wall,” “Hey You,” “Comfortably Numb,” etc.) but I was surprised by how many had never listened to the entire album and did not know what it was really about.

I explained that the album deals with a central character whose depression, fueled by a traumatic childhood resulting from the death of his father at an early age coupled with an overbearing mother, leads him to chemical dependency and anti-social behavior. This behavior helps him to build a metaphorical wall around himself, shutting him in from the outside world.

As researchers, over time, we have all added bricks to the walls separating our clients from their consumers. This wall is embodied by

Editor’s note: Michael Carlon is vice president of strategic insights in the New York office of Los Angeles-based OTX Research. He can be reached at 212-886-5900 or at mjcarlon@mac.com.

the one-way mirror of every focus group facility as well as by computer monitors when online techniques are being used.

For good reason

Participants and clients have traditionally been separated for good reason. In many cases, it is best to have a trained moderator leading a discussion with groups of people. Such cases typically involve research in which a discussion is being led to evaluate something (i.e., an advertisement, product, concept, positioning, etc). In these instances it is best to have a skilled moderator leading the discussion and probing into various areas.

However, consumer insights are also used to spark creativity, not just evaluate creative output. In such cases, researchers should take a



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sledgehammer to the walls dividing those in the back room from would-be group participants and encourage approaches that provide direct consumer contact. Having direct contact with consumers helps marketers:

- develop instincts for the consumer groups that they are marketing to;
- take an active part in the insight process; and

- create a collaborative environment where superior ideas can emerge.

Regular interaction

Imagine for a moment how well you could craft or evaluate ideas for your target market if you actually spent a significant amount of time with them - not by observing them in the context of a focus group but through regular person-

al interaction with them. You could observe how they use your product in a natural setting, you could see the impact their children have on shopping occasions, you could see them turning the channel when the commercials come on while simultaneously searching the Web or finishing up their latest blog entry.

After spending a lot of time with people in your target market, you might find that you start reacting to creative ideas more efficiently and with greater certainty. Eventually you will be able to look at an idea and evaluate how well you think it will fly based on your own personal experiences vs. what others have told you about the target.

Taking an active part

Most marketers' idea of taking an active part in the insight process involves coming to a focus group facility (late), checking e-mail, inhaling M&Ms and wondering why we always order chicken at these groups! Oftentimes, marketers rely on the researchers in the back room to summarize findings and this reduces the burden on them to stay focused during focus group discussions.

Imagine, though, that you did not have the researcher (or moderator) as a crutch to lean on and that it was up to you to understand consumer wants and needs. You would have to pay more attention and let your curiosity guide you throughout your consumer interactions. By doing so, you become more cognitively involved in the insight process and your experiences will serve as the foundation for idea generation. This will lead to more efficient ideation since you won't need to question whether ideas are valid; if they are based on the direct interaction you have had with consumers then they are by definition valid. As such, your concerns should not surround understanding which ideas are valid, but

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which of the valid ideas you have generated are most worthy of further development.

Don't go it alone

While personal interaction with consumers is recommended, marketers are not advised to go it alone. Rather, such experiences should be had in teams. For example, a cross-functional brand team of 12 people looking to understand the shopping habits of aging Boomers may want to divide into four smaller groups of three members each. Each team then may want to have three immersion experiences with members of the target market. Such a design allows one person to ask questions while the others either take notes or video the session. Having multiple immersion experiences lets each team member interview a consumer and ensures that a reasonable number of consumers are interviewed.

Collaboration comes in when the teams debrief about their experiences. The debrief should be facilitated by a trained moderator using a structured process in which team members talk about their observations from the immersions and work as a team to capture areas of opportunity from those observations. Once established, the areas of opportunity can serve as the springboard for idea generation.

Following this approach, all team members feel that they have an active role in the idea generation process and develop ownership of and enthusiasm for the ideas generated - both of which are important in keeping momentum going throughout the development process.

When considering direct consumer contact, you might wonder whether the role of the researcher is diminished. This is definitely not the case. While the researcher no longer needs to be the ears and eyes of the mar-

keter, the researcher is vital to the success of the process. The researcher must craft appropriate market immersion experiences as well as draft a discussion guide that interviewers can follow when going through the process. In addition, researchers should be part of the process as they are part of a brand team.

Start building

Focus groups will remain a powerful tool in our qualitative toolbox to help understand how consumers react to ideas, creative, concepts, etc. In fact, facilitated discussion with participants in a central location will likely enjoy the majority of all dollars earmarked for qualitative research. However, in situations where consumer insights will be used to spark ideas, marketers are advised to tear down the walls dividing themselves from their target market and start building a firsthand understanding of their consumers. | Q

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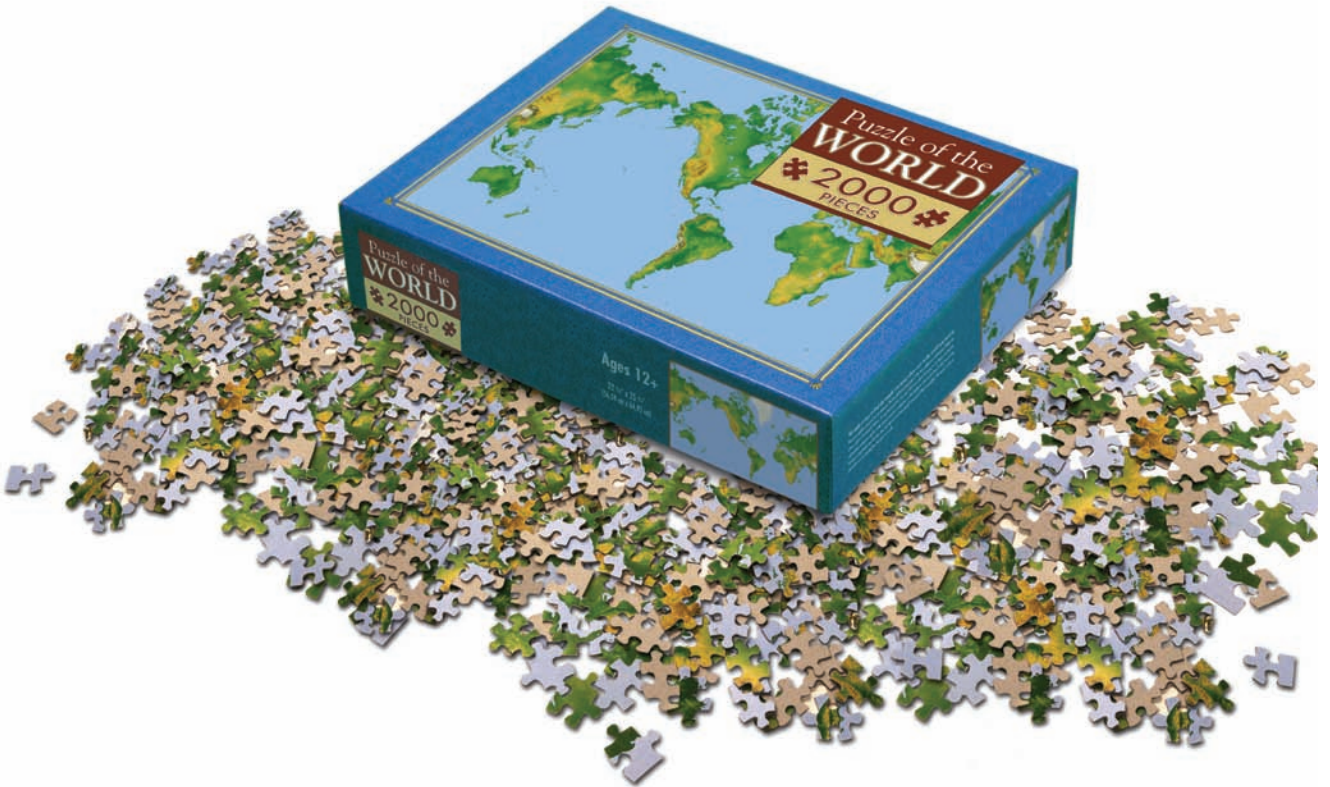
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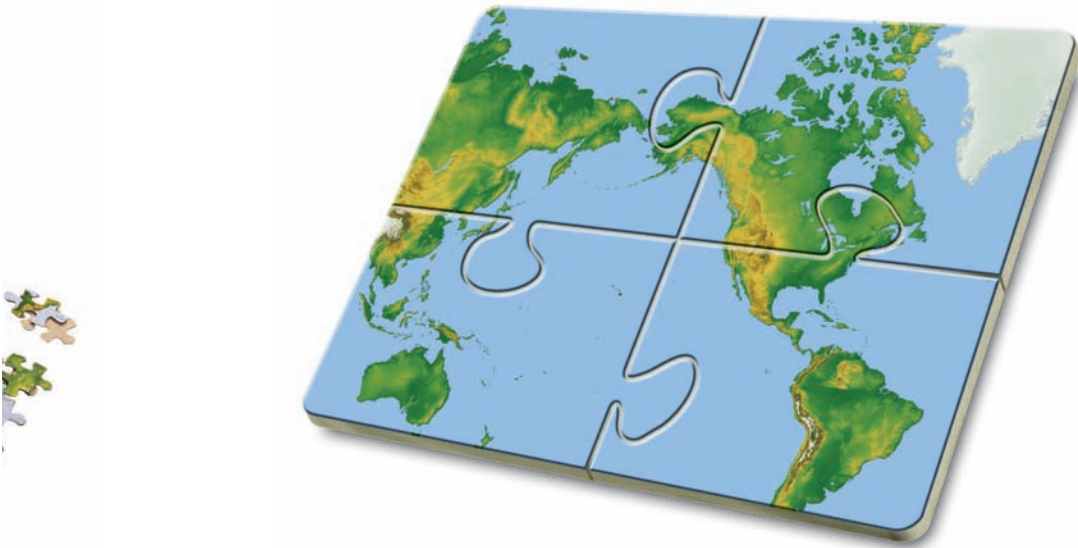
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By Judith Langer

qualitative research

Time-honored or time to go?

Here are excerpts from an article entitled “Fine-Tune Your Research” which appeared recently in *Media*: “Look for innovative ways to uncover insights and consider methodologies that are less well-worn and familiar than focus groups.”

Also: “Focus group monomania: In many companies focus groups have become synonymous with qualitative research. While they’re suited to meet many objectives, focus groups also have distinct disadvantages – professional ‘focus groupers’ who have dominant personalities or submissive ones. Either can lead to misleading results.”

After reading the article, my reaction as a qualitative researcher (moderator) was a groan and a yawn. The yawn because this is one of many attacks routinely appearing these days in advertising, marketing and research trade publications (including this one) and in the general media as well. A groan because I believe that focus groups, with whatever limitations and shortcomings

they have, remain a valuable tool under unfair attack. Long a staple of market research, focus groups are increasingly assailed. It’s a good time to ask if the method is passé or if it still has value.

Despite the frequent attacks, focus groups remain the most commonly used qualitative research technique both in the U.S. and worldwide. Is there a solid reason for this or is it just because of client ignorance and inertia?

With focus group-bashing now in fashion, a veteran moderator comes to the technique’s defense

Editor’s note: Judith Langer is president of Langer Qualitative LLC, New York. She can be reached at 347-684-9073 or at judy@langerqual.com.

Pendulum has swung

Part of the continued popularity is the fact that, for good or bad, focus groups have become identified with qualitative research. Many clients regularly say “We want focus groups” when they really mean “Let’s do something to understand how consumers [or executives] really think and feel, what their underlying emotions are” (a more long-winded request, to be sure). To some extent, the pendulum has swung to what I call the “anything but focus group” side: “Give me ethnography/depth interviews/whatever, especially if it’s new and different.”

Focus groups are frequently described as “traditional” qualitative research – even though individual depth interviews (IDIs) and ethnography have also been done for decades. The term traditional is a loaded one, with negative connotations of being old-fashioned, out-

of-date, rigid, etc. Worst, according to critics, is the traditional focus group format: sessions held in a one-way mirror facility with clients observing (eating M&Ms), six to 10 respondents around a conference table for two hours.

Inside and outside

Criticisms come both from inside and outside the research industry.

- Qual vs. qual: Looking back to the 1970s when I started doing qualitative research, it was the quantitative researchers saying qualitative isn’t true research; articles on the “uses and abuses” were common. Now, it’s often qual researchers touting the superiority of alternative methods over traditional focus groups. Some of their methods are worthwhile, but others are just repackaged with new names and/or gimmicky.

- Clients: Some now automatically reject the idea of focus groups (or, at

least, anything called a focus group).

- The media: Research and marketing publications run their own pieces and outside writers’ articles attacking focus groups. In the general media, it has become common to equate focus groups with all survey and market research and, worse, to imply that the method is only used to manipulate people and cater to the lowest level of tastes.

Perhaps the most prominent assault came from Malcolm Gladwell. His bestselling book *Blink* devotes a chapter to market research that specifically goes after focus groups. “Focus Groups Should be Abolished” was the attention-getting headline in the *Advertising Age* story in August 2005 that excerpted his address to the American Association of Advertising Agencies’ Account Planning conference.

Much of his criticism is based on the fact that the Aeron chair’s “aes-



thetic scores suck[ed]” in focus groups yet the Herman Miller company decided to introduce the style, which Gladwell applauds. The chair, of course, goes on to become a great success. “Over the next two years... sales start to go up [and this is] one of the greatest-selling chairs in the history of office chairs. That’s a story that tells us something very sobering about the institution of market research. And in particular the effica-

cy and usefulness of focus groups. Because the whole point of focus groups is to be able to help us predict what’s going to work and what’s not. If a focus group cannot do that, then a focus group is actually useless.”

Really? Whoever said that the role of focus groups is to predict the future? As Gladwell himself reports, the chair went on to win awards. I have no idea who conducted the focus groups (would someone admit

it?) or how they were done. How many focus groups were held? Qualitative is qualitative no matter the number but studies with just two focus groups are especially shaky. What kind of people were respondents? How was the chair presented? Did respondents look at a picture, a prototype or a real model? Did they get to sit in the chair and find out how comfortable it is despite its (then) odd look? Obviously, the closer the research comes to consumers’ real-life experience of a product, the better. Without knowing how well the focus groups were done, it’s still fair to say that the research may have been right about initial consumer reactions to the chair - before it won prizes and received media attention.

One input

Focus groups should only be one input in marketers’ decisions anyway. Of course, hypotheses should be tested quantitatively when major/expensive decisions are involved. If a company strongly believes that a product has great potential with effective consumer education and publicity, it makes sense for it to take the risk of moving ahead.

There are a number of other criticisms of traditional focus groups:

- Stale, stiff format — Respondents are physically and psychologically uncomfortable at the conference table vs. a living-room setting at a facility, their own homes or offices, or some other place (a store, their car, a bar).
- Intellectualizing — People respond to direct questions with what they consider to be rational answers; people think in images, not words.
- Bad respondents — Some people lie about their qualifications to get into FGs, participate far too often, come just because of the money and/or food rather than a real interest in the topic.
- Limited airtime — Respondents have only a few minutes each. Critics take the total FG time of two hours and divide it by the number of respondents to come up an airtime figure of just minutes per person.

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There is not enough time to get detailed information on people's history and buying decisions.

- Group bias — Dominant respondents highjack FGs, talking too much and influencing others.

- Not for sensitive subjects — People don't open up in a group on deeper emotional issues (money, sex, illness, etc.).

- Acting — Respondents try to please the moderator by saying they like the product/ad being discussed.

- Advertising isn't experienced in groups — So it doesn't make sense to ask people about ads when they're in a group.

Before addressing these criticisms, let's talk about why there is such a barrage in the last few years.

- A mature product — FGs are, to some extent, a victim of their own success. Experiencing "been-there-done-that" boredom, some clients search for change, novelty (and sometimes entertainment). For some research suppliers, this is a business opportunity.

- Mediocre moderating — Some qualitative research practitioners are not very good or are even downright bad, which results in clients becoming disillusioned with FGs as a whole. For example: moderating that is superficial, largely closed-ended, leading, lackluster, theatrical; moderators who cannot control group dynamics, fail to probe, rigidly march through topic guides, talk more than the respondents, and so on.

- Backroom misuse — Clients who come to instant conclusions, listen selectively to whatever supports their biases, don't listen (schmooze with other observers), etc. While this has always been a problem, in some ways it is now worse because of computers. Clients check their e-mails during the groups and write up their versions of respondents' comments, sending their notes out to the client team (but usually not the moderator).

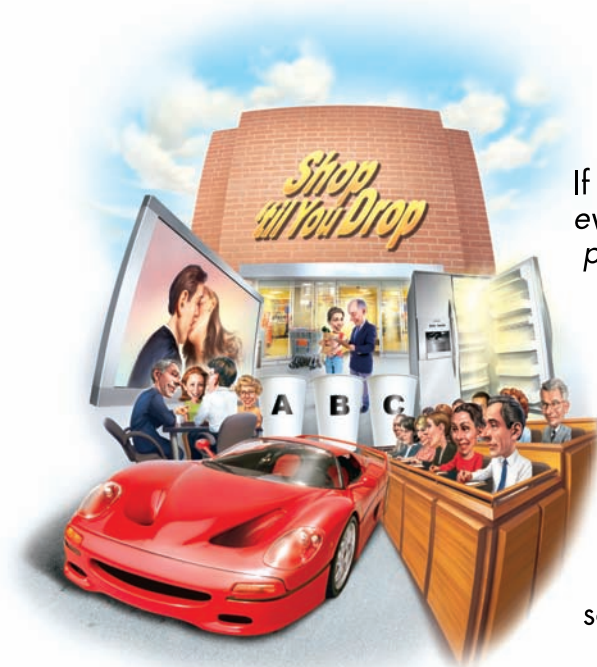
- Recruiting issues — Respondents who are what the Qualitative Research Consultants Association

(QRCA) and Marketing Research Association (MRA) call "cheaters" (lie about their qualifications, demographics) and repeaters (come too frequently, usually lying about past participation). Clients sometimes report they know someone who falls into one or both of these categories; some say they used to do these things themselves!

- The bashing bandwagon — The more FGs get negative attention, the more clients (market research and marketing) and research suppliers join in. Politically, it becomes increasingly difficult for researchers to recommend FGs since they are viewed as an out-of-date no-no.

It's important to differentiate between real and perceived problems with traditional focus groups. Some criticisms are at least partially valid, I believe, but this does not mean the answer should be to "abolish focus groups."

- Recruiting — No one knows how extensive the cheater/ repeater problem is. In addition to the anecdotal



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dotal evidence I've mentioned, some qualitative researchers, including me, have either had respondents admit to or reveal these abuses or have had bad vibes about fishy respondents. Obviously, the same problems arise in recruiting across methodologies; too-frequent participation in online surveys by a small percentage of people, for example, has been discussed lately. FGs are quite literally in the spotlight, however, with clients seeing respondents firsthand; incentives are higher than for most other types of research, too, sometimes attracting the kinds of people we do not want. The QRCA and MRA are both concerned by the FG recruiting issues. One simple step that has been instituted is that many fieldwork facilities now ask respondents to show their IDs when they check in; they are told during recruiting that this will be required, which may help to scare off some cheaters/repeaters. A variety of other measures are also being studied.

Despite my concern about recruiting issues (I've been a member of the QRCA field committee for years), my overall sense is that we can trust most FG respondents. In research using recruiting from fieldwork facility databases compared to client lists, mainly people who have never been in a FG before, differences usually do

not stand out between the types of participants or the information they provide. (It is easier, however, to recruit upscale people with a list, especially if the client's name can be mentioned.) Further, hypotheses generated in FGs often do hold up in quantitative research, which shows that the qualitative sample was not oddly skewed.

- Quality moderating — Clients who choose the lowest-priced moderators, viewing qualitative researchers as a commodity, may end up with poorly conducted FGs and then blame the technique. The importance of a high-quality researcher is nowhere more crucial than in qualitative research where so much on-the-spot judgment is needed; sometimes, but not always, getting quality means paying more. In any case, choosing a qualitative research consultant based only/mainly on price or opting to use an in-house person at the client company to moderate ("How hard can it be?") can result in mediocre to bad research.

- In-depth responses — Individual interviews, I agree, are better for storytelling about past experiences and decisions than FGs. The airtime formula mentioned above, however, is a poor way of looking at FGs. Body language "talks" too; comments evoking head nods or shakes, group laughter and animation levels, for example,

all tell us a great deal. Further, many sensitive subjects can be explored effectively in FGs; respondents sometimes open up just as much – or more – when talking to a group of peers with the same problems as they do to an individual interviewer.

Effective techniques

Turning to what I consider to be perceived problems, many of the objections to traditional FGs can in fact be handled by effective research techniques.

- Rapport matters most — Many FGs on emotional topics work well in facility conference rooms. The setting is a professional one that respondents respect and is not necessarily intimidating, as some critics claim. At the same time, it's important that the room be set up to enhance respondent comfort. For example, the table should be the right size for the number of respondents rather than the enormous ones many facilities have today (fortunately, modular ones can be broken down); chairs should be well padded; light refreshments in the room make respondents feel welcomed and more relaxed.

A good moderator with a warm yet professional style is the critical element in putting people at ease. Active listening – genuine interest, non-judgmental acceptance – makes them feel valued and encourages them to reveal more.

Non-traditional living-room arrangements at facilities can be helpful in certain situations, especially small groups of friends. Stagy ones that don't look especially inviting or scrunch strangers on a couch without a place to put their coffee cup can actually result in awkwardness. Similarly, "girlfriend groups" have pluses and minuses. Friends are, at least initially, more comfortable with one another than a group of strangers, of course; however, they may be careful not to hurt each other's feelings by disagreeing or may be reluctant to talk frankly about certain topics with people who know their families.

- Handling group dynamics — Good moderators know a range of

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techniques for drawing out quieter respondents and for toning down more talkative and opinionated ones. (It's unrealistic to think that all respondents will speak equal amounts.) A very simple approach many moderators use, for example, is to have respondents write down comments on the subject or materials before the group discussion. Sometimes the respondents clients think are dominating really aren't; they may talk a lot, but that does not mean the rest of the respondents are swayed - in fact, they may distance themselves from the big talker.

• **Beyond rational answers** — Here, too, good moderators use a range of visual and verbal techniques to get below the surface of superficial responses. Projective questions, video and/or written diaries and collages are just a few. Observations can take place within FGs, too, by watching the way people interact with products, ones they are asked to bring in, handle or prepare, for instance. And we can see how they interact with one another, such as when a brand advocate tells others about “this great product/technology you’ve just got to try.” Often what is most effective, however, is the moderator’s relationship with respondents - creating rapport so that people feel comfortable talking about non-rational emotions and decisions, probing in a conversational way rather than using obvious techniques/exercises (“Now, let’s play a game”).

Growing awareness

So, why should focus groups be used today? Perhaps the good thing about all the FG bashing is a growing awareness that there are, in fact, many variations on the way FGs can be done and a number of other qualitative research techniques are worth using. FGs are not - and never were - the one and only qualitative technique. Our approach should be to figure out what’s the right method for the research’s purpose. My own view, as a practitioner who employs a range of methods, is that there is still great value in FGs when

they are done right.

• **Connectivity** — Interaction brings out more. FGs trigger respondents’ memories and feelings. Talking together, respondents often build on one another’s ideas. This is especially useful for concept development and idea generation.

• **Consumer connection** — Clients can see/hear people firsthand. Despite some backroom abuses, this is generally invaluable. FGs are not the only method offering this benefit, but they are often, for reasons below, the most practical way.

• **Convenience** — Time efficiency. The same number of respondents can be interviewed far more quickly, and sometimes effectively, in FGs than in individual depth interviews. (From a moderator’s point of view, four hours of FGs is also less tiring than six to eight hours of one-on-ones.)

• **Cost-effective** — A lower cost-per-interview than in-person in-depth interviews (IDIs), which require a great deal of moderator and facility time.

• **Clients convening** — The opportunity for conversation. Interaction of observers, together in person or through remote viewing, along with the moderator also stimulates new ideas. The FGs represent time officially set aside to think about and discuss a particular issue or project and form a more concentrated approach than a series of phone calls and e-mails.

• **Con brio** — More lively than IDIs. It may sound trivial but FGs are more dynamic to do or watch than a full schedule of depth interviews. By definition, of course, there is more interaction and even more humor. (I am not suggesting conducting FGs for their entertainment, needless to say.)

Rightful place

In short, efficiency, dynamism and insights continue to make focus groups a valuable technique. While the bashing is probably far from over, I do hope that both practitioners and clients will recognize focus groups should have a rightful place in qualitative research. | Q

Still waters run deep

It has been my experience that when clients perceive a project to be of especially high importance, they request us to recruit “creative” respondents. Regardless of the nature of the project, we always say we want articulate respondents. This suggests that if we don’t take special screening precautions, we are likely to end up with a large number of uncreative respondents who have little to say. We often build in special screener questions to gauge how articulate or creative a prospective respondent is, e.g., “If you could pick one famous person to be your dinner guest, who would you chose and why?” Or, “If you could show me just one item (not a photo and not a person) that represents you, what would you choose and why?”

While devising these questions can be fun, it is a rather dubious process since recruiters usually evaluate the responses. These types of questions are often placed toward the end of the screener. Is it realistic to assume that recruiters are: a) trained to effectively evaluate responses to these questions, and b) motivated to not accept a potential respondent who qualifies on all other specifications?

These assumptions are especially impractical when recruits are tough and last-minute. I’ll sometimes ask facilities to fax me the responses they have received to the questions about articulateness or creativity in hopes that I’ll be a better judge of the respondent than they. However, the reality is that a simple answer to one or two questions, likely shortened and paraphrased by the recruiter, is a poor assessment of a respondent’s ability to be articulate or creative. The questions are particularly bad indicators for introverts who are uncomfortable coming up with an answer off the top of their head.

Not creative

A common tendency is to assume that quieter, more introverted respondents are not particularly creative.

Other misconceptions are that introverts are unfriendly, won’t talk, don’t like people and are withdrawn or shy. Some more extroverted clients – and moderators – assume quieter respondents are just not very bright. To the contrary, leaders in psychoanalysis and communication tell us that introverts are often better thinkers than extroverts. Introverts are independent yet flexible, have a strong ability to concentrate, enjoy creative out-of-the-box thinking and possess strong analyti-

How to recognize and benefit from more inner-directed respondents

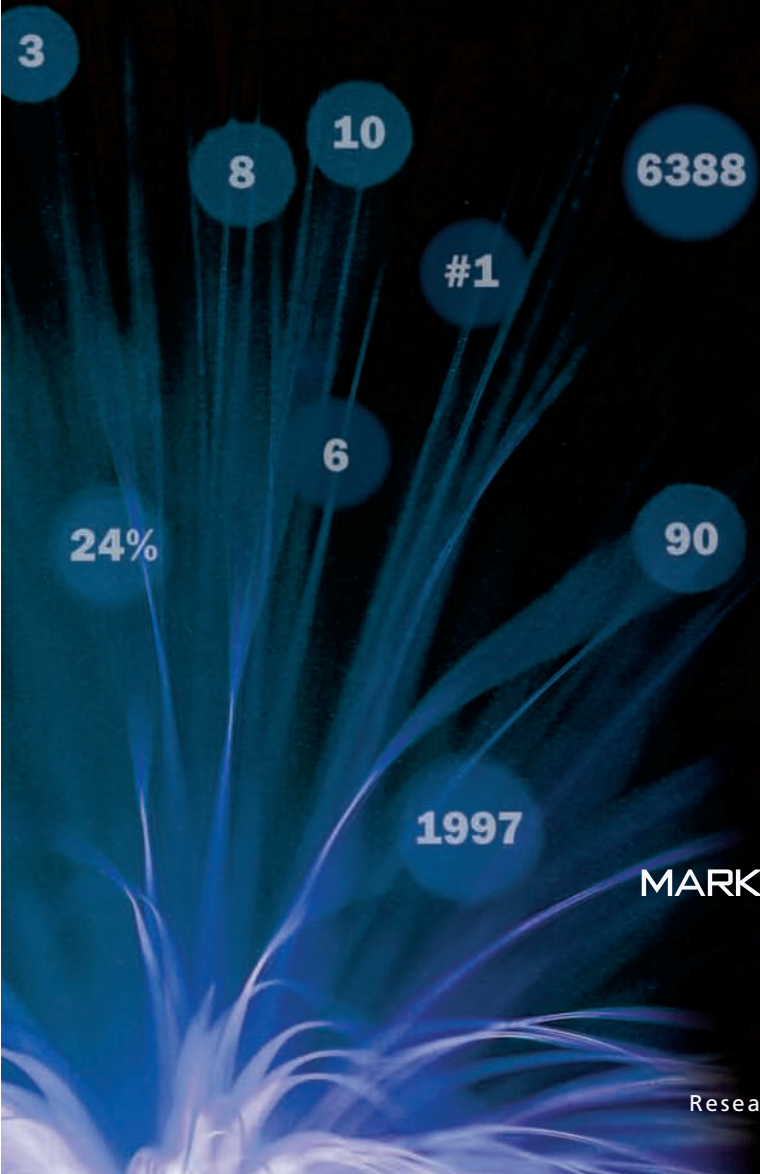


By Myra Summers

Editor’s note: Myra Summers is president of Focus Forward Inc., a Winston-Salem, N.C., research firm. She can be reached at 336-760-3311 or at myra@myrasummers.com.

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cal skills for concept development and problem solving, i.e., creativity!

Unless you know how to spot an introvert, it's easy to dismiss or pass them over. Big mistake! There may be a volcano of rich, juicy insight brewing within. The introvert's tendency to avoid immediate and enthusiastic communication of their ideas sometimes leads to the assumption that they have nothing of value to offer. This fallacy results in the

potential loss of quality feedback and applicable insight. We do ourselves a major disservice when we give up too early on more introverted individuals. Introverts have the ability to take us to the next level in terms of developing ideas and expanding concepts. However, their reluctance to fight to be heard, slower processing time or a deliberate style of thinking may result in our missing their ideas, solutions and creations. They are still

digging deeper in their own minds but the moderator has moved on to the next question or topic.

Different wiring

Better understanding of the different wiring of introverts and extroverts is key to appreciating the value more inner-directed respondents can bring to a project. The Myers Briggs Type Indicator (MBTI) is probably the most recognized indicator of temperament. Building on Carl Jung's theories, Isabel Briggs Myers and Katherine C. Briggs developed this indicator, which includes four temperament continuums, introversion/extroversion being the most widely used. The MBTI proposes that temperament reflects innate preferences established in early childhood based on our neurological genetic wiring. Myers and Briggs purport that introverts are energized by the inner world of concepts and ideas while extroverts are more focused on the outer world of people and things. Introverts are estimated to account for about 25 percent of the population. Being vastly outnumbered by us sometimes loquacious extroverts, many introverts have become quite proficient at interacting with the world around them. They just prefer to think things through internally. Introverts do their best work inside their own minds where they can adequately reflect on issues without external distraction. Conversely, extroverts tend to need external input or dialogue in order to formulate ideas and problem-solve.

Marti Olsen Laney, a psychotherapist who specializes in working with introverts, explains that their neurological wiring assists introverts in retrieving long-term memories, problem solving, introspection, complex thinking and planning. Research indicates that introverts have more brain activity in general (that's humbling, isn't it, fellow extroverts?), specifically in their frontal lobes. They enjoy in-depth discussions, take longer to make decisions and use their short-term

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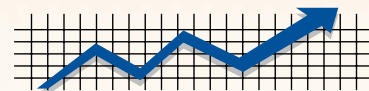
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memory less often than extroverts. Introverts prefer depth to breadth, are more likely to have fewer but more intimate relationships, and know particular topics in-depth. Conversely, because extroverts have more activity in the back of their brains, they are energized by external stimuli. Extroverts like breadth – they consider lots of people friends, think variety the spice of life and are OK with knowing a little about a lot. Things usually move faster for extroverts and in a more measured direction for introverts. Introverts tend to work out their insights slowly and carefully whereas extroverts often have an urge to communicate and put their inspirations into practice. As a consequence, extroverts may serve up more responses or ideas but introverts' insights may prove more profound.

Introverts notice details and absorb a lot of information. They have a strong ability to concentrate without being affected by the external environment and thus may not be as likely to be swayed by groupthink. While they may appear withdrawn or uninvolved, in reality they are often focusing, thinking and reflecting. Introverts find interruption frustrating as it breaks their concentration. The characteristic pause frequently found in the introvert's communication style serves a valuable purpose. It gives them time to study a new situation so the corresponding action will make sense. How many times have you noticed that a particular respondent doesn't say much but when she speaks she provides very valuable information? That respondent is probably an introvert!

Myers uses an analogy to common geographical associations to help further crystallize some of the differences between extroverts and introverts. She compares the introvert temperament to the New England stereotype of silent, reserved, slow-to-bend, inclined to mind their own business and leave others to do the same. Myers compares the extrovert temperament with descriptors often

used to describe the traditional Southern characteristics of openness, accessibility, communicativeness and friendliness.

Different gifts

Does this suggest we should conduct groups exclusively among introverts now? Certainly not. The two temperament types bring different gifts to the discussion. Extroverts are innately relaxed and comfortable in a group environment and help get the initial stages of conversation started. They tend to be articulate and accessible, and are likely to be the first to respond as we segue into other topics. We extroverts tend to talk first and think as we go. Thinking out loud is not necessarily a detriment in focus groups, as it gives introverts time to think and process internally, without the loss of too much time and energy between dialogue. A weakness of extroverts, especially in extreme types, is a tendency towards intellectual superficiality, i.e., grasping at the first or most obvious answers versus thinking deeper about alternatives and implications. Pat Weaver, a counselor in Winston-Salem, N.C., says that, "After the fact, the introvert is more likely to say, 'I wish I had said...,' whereas the extrovert will say, 'I wish I hadn't said...'. Extroverts talk until they find out what they want to say. Introverts stay silent until they know what they want to say."

Not the same as shyness

So how do you know if you have an introvert as opposed to someone who is just shy, tired or preoccupied by wondering if they're going to get a ticket for being parked illegally during the focus group? First of all, introversion is not the same as shyness. Introversion has to do with how a person is wired. Conversely, shyness is extreme self-consciousness and a lack of confidence, usually as a result of life experiences. Some of the behaviors that may signal you have an introvert respondent include:

- may look blank, as if not listening;
- reflects before speaking;
- looks away when speaking, enabling them to concentrate on what they want to say;
- more eye contact when listening to instructions or getting new information (It's very important to introverts that they have all the information and know exactly what is expected of them.);
- observes before jumping in; hesitant to interrupt others;
- speaks slowly, often with pauses, sometimes seeming to hunt for words;
- listens more than speaks;
- think they have told you something that they have not, because they have been mulling it around in their head;
- able to see both sides of an issue; less likely than extroverts to argue vehemently for only one position;
- start in the middle of their idea, or just speak their final thought;
- may speak softly, and with a minimum of variation in pitch;
- often reveal they possess a surprising amount of information, if given the chance and made to feel comfortable;
- uncomfortable when too much attention is focused on them;
- can more easily articulate thoughts and ideas in written form.

How do we help them?

Once we realize we have one or more potentially valuable introverts in a group, how do we help them tell us what we need to know? Foremost, it is our responsibility to honor the fact that these individuals are hardwired to think inwardly and give them an opportunity to do so. We need to create an environment that gives them time (sometimes tricky in a focus group) and ways to let ideas gel and expand. Usually, we will need to inquire about what introverted respondents think. Invite them to speak, but always do so in a welcoming, non-threatening tone. Admittedly, this can be frustrating and seem like a lot of extra work.

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However, the payoff can be worth it. Introverts often provide new insights, depth and unconsidered views to discussions.

When talking with introverts, we need to match their pace, go slower rather than rushing them, speak softly, keep some physical distance versus getting “in their face,” and not interrupt. Don’t force them to go first. Rather, let them have a little time to think. Trying to force

the introverts to “spit it out” is ineffective as it only serves to increase their anxiety. Try to keep in mind that being in a group of extroverted respondents (and often moderator) for an extended period of time, especially if things are consistently chaotic or lively, can be exhausting for introverts. Excessive noise, consistent activity or too many forms of outer stimuli can cause introverts to shut down as a means of limiting

input, sometimes referred to as a mind/vapor lock.

Homework is a wonderful tool for introverts and extroverts. Assignments such as collages, reflective writing and photo stories allow introverts to take as much time as needed to express what they want to communicate. Giving respondents forewarning that they will be asked to explain/present their homework helps reduce the stress of suddenly and unexpectedly being found on center stage.

Providing mental breaks helps introverts recharge. Such breaks may be achieved through introducing individual written exercises, involvement in projective techniques such as visualization or storytelling, or dyad activities where the Introvert is communicating with only one other person.

Introverts frequently have a much easier time communicating words or thoughts in written versus verbal form, coming to life when engaged in reflective writing. Introverts are often in their comfort zone with writing exercises that allow them to reflect, focus on what to include, and exclude what they consider extraneous. The characteristic verbal pause seems to disappear, with words flowing much more fluidly on paper. Writing gives introverts the opportunity to order their thoughts in a certain way that will lead to a particular perspective, and ultimately exploring and imagining alternatives that may result in those wonderful “aha” moments.

Help both

We will likely continue to devise screener questions aimed at helping identify articulate, creative respondents. However, it’s more important that we provide an environment and utilize tools to help both inner- and outer-directed respondents formulate ideas and voice their opinions. The next time you have a quiet, reserved respondent in your group, look for the signs of the introvert. Don’t mistake a quiet respondent for someone with nothing to say. | Q

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Walk a mile in their shoes

As a third-party qualitative research consultant (QRC), I have the luxury of being able to easily maintain pristine objectivity about my clients' products and services. I realize that this luxury is extremely difficult for the internal market research professional to maintain. While working on several business lines obviously provides some degree of neutrality, the internal market research professionals can't help but "drink a bit of the Kool-Aid." They are, after all, employed by the company that is marketing the product(s) or service(s), and some adherence to a company bias is almost unavoidable.

Couple this with the fact that he or she often works with a client who is heavily invested in the product or service and it becomes even more difficult to maintain clear neutrality. Think about it: The internal professional's clients spend at least 40 hours a week hyper-focusing on how to get toilets cleaner, how to make eyelashes longer or how to differentiate their bank's checking account from that of every other financial institution. In this situation, bias is everywhere, inescapable, part of the very air that each of the company's employees breathes.

A well-prepared QRC can help with this situation, becoming an invaluable resource and partner, enriching both the idea-generating phase and the actual research process. Although some marketing clients want their moderator to just "ask the questions," finding a QRC who can help move the company to a new level of understanding and objectivity about their

product or service adds significant value to the company's qualitative research efforts. And, as a research buyer, internal market research professionals can become more discerning purchasers of qualitative research services if they demand more than "just a moderator."

Although a variety of approaches can be used, this article presents six surefire ways that a QRC can help

clients become immersed in their business and develop a fresher, more creative perspective.

Backward-integrate

Let's first start with the ideation process. No QRC likes to bring lackluster ideas into the focus group room so the best way to prevent this from happening is to backward-integrate into the idea-generating

Achieving better qualitative research outcomes through client immersion



By Martha E. Guidry

Editor's note: Martha Guidry is president of The Rite Concept, an Avon, Conn., research and consulting company. She can be reached at 860-675-5522 or at martha@theriteconcept.com.

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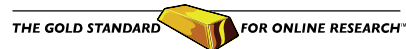
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phase. Several approaches can be utilized to help a client think a bit more creatively about their own business:

- *Casual, client-led interviews.*

Similar to asking a respondent to make a collage prior to entering into a qualitative experience, I often ask a client to conduct some informal interviews with friends, family or colleagues who don't work on their business. It doesn't matter whether the client follows all the appropriate guidelines for asking unbiased or leading questions. My goal is to ensure they are hearing from a neutral source something potentially new about their product/service to prime the pump prior to the session.

I always provide several specific questions that should engage the client and highlight some aspect of their business with plenty of blank lines for the answers. The rule of thumb is to put more lines on the response sheet than you think the respondent will need to answer – often they'll fill the entire space. Suddenly you have lots of food for thought before you even start your ideation session.

A great example of using this approach was with a manufacturer of watches. As pre-work for an ideation session, I told the client participants to ask several questions in an interview; however, one of the most engaging learnings prior to the session was a very simple and almost obvious question of "What is time?"

- *Product/service experience.*

The nature of the client's business will determine whether real-time experience with the product/service must happen before or during the session. Interestingly, what often happens with clients is that they might not even use the product or service they sell. As such, they need to reacquaint themselves with the product or service through what I call a new set of radar.

Often as part of an ideation session, I'll ask the client to use their product. For example, I'll have the client's R&D team make a toilet or shower filthy and have the clients clean it. Many clients hire a cleaning

person for these tasks in their home – they haven't cleaned a toilet in 10 years! To really engage their thinking I'll typically divide the team up and add some constraints to the process.

For example, one team cleans the toilet using only their right hand, one team cleans only with their left hand, and one team cleans while blindfolded. Why the constraints? It helps the client think about the experience in a fresh way. You'd be surprised at the output from an exercise such as the one described.

The same outcome can be duplicated for a service business. Have the client call his/her own or a competitor's customer service line and evaluate the experience. Ask a client to mystery-shop several competitors' stores for a particular product or service or be a mystery diner for a restaurant. They could even Google key industry words and see what comes up and determine whether the information was confusing or straightforward. The possibilities are endless. However, they do require some creative pre-thinking by the QRC to insure the experience is carefully incorporated into the ideation session.

- *Watch in-context product usage videos.*

Often clients have lost touch with what their consumers are really doing with their product or service. Occasionally, a refresher on what is happening is appropriate. This is particularly helpful when a product may be used in a variety of applications or across different countries. If the marketing engine for a product is based in one particular region, like the U.S. or Europe, it may be staggering to realize that assumptions that are true for one region may not be true for all.

One particular example comes to mind. I was working on concept development for a North America-based household cleanser brand in Brazil. As part of the session, I asked that the non-Brazilians watch some in-home cleaning with their products. Imagine the surprise when they watched tapes of barefooted women cleaning their bathroom with a giant

broom-like mop and a hose! Clearly, this experience changed many incoming assumptions and paradigms about the new product concepts.

Help with immersion

Let's now think about how actual qualitative research can help with immersion. Triangulation of your qualitative research using a variety of approaches can create a more complete picture for your clients. Imagine research on a new health drink. Triangulation could mean a combination of secondary research on the topic (what's on the Internet), some focus groups with the end consumer, in-depth interviews with subject experts (such as doctors or fitness professionals), and intercept interviews with those purchasing drinks in a health club. While this will provide a rich context of understanding for the client, let's think about how the clients can actually roll up their sleeves and get involved. Here are my three favorite research-related approaches to get them engaged.

1. Participate in in-context interviews.

One way to reconnect with the consumer is through in-context interviews. Although I would never suggest that the clients conduct the actual interviews, having a few come along for the experience is very enlightening. Typically this works best with two to three clients who are given a specific role in the process (note-taker, videographer, etc.). For this to be successful, clients need some training and coaching on what is and isn't appropriate in such a setting. But more importantly, the QRC must prepare some type of feedback form to capture the data in a consistent manner so that once they are back in the office the team has a wealth of information to evaluate. I will typically create a standard, fill-in chart that captures observations such as current usage, problem/opportunity and current options in addition to probing questions to push the client's thinking – such as, how does the problem observed flow into a benefit and what support

Creating Connections

In this high-tech world, it's easy to forget that face-to-face interaction is still one of the best ways to learn about people's experiences and impressions. Even though technology is playing an increasing role in data collection, we know it will never replace direct conversations with customers in a focus group setting.

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The worksheet approach is particularly helpful when trying to generate new product concepts. The in-context interview might suggest new ways that a consumer is using an existing product in addition to seeing the substitutes which might be an opportunity for a product enhancement (like adding baking soda to toothpaste).

2. Bulletin-board (BB) virtual diaries.

Using the BB is merely a new twist on an old technique - consumer diaries. However, the richness of getting real-time feedback and the flexibility to occasionally probe and ask questions adds a new dimension to the process. In addition, the clients can go in and review the BB periodically to immerse themselves in the research as it is occurring. Although I've primarily used this in new-product trial experiences, it could be easily duplicated for a business-to-business situation or with an interaction with a service.

If scheduled appropriately, the team has adequate time to review the tran-

scripts and the entire consumer interaction can be used as helpful fodder for a discussion guide development or even to divide the participants based on their experience with like-minded respondents (i.e., liked vs. disliked product) for some type of focus group.

3. Active listening in the back room.

Probably one of the biggest challenges faced by any QRC is computer usage in the back room. Although we want to believe that the client is intently listening to the front-room dialogue and frantically typing notes on their computer (and some do!), often we are plagued with the distraction of clients responding to e-mails or writing another document throughout the entire research and only half-listening to the conversation.

To engage the client, I typically have them listen for particular themes and record their comments on Post-it notes - one idea per Post-it.

Now that you've fallen out of your chair, let me explain why this works so well. First, clients have to close

their computers to write Post-its, so you've solved the previously-stated problem. Second, clients capture with more detail the individual ideas or suggestions mentioned in the group when forced to "sound bite" their learning. Third, clients capture the actual respondent words rather than their summary of the idea. And fourth, at the end of the research you've generated tons of information that you and the client can sort through and cluster to identify themes and have a much more engaged and involved debrief. Although this may require some additional time to sift through the information, the learning is exponential and it saves a debrief in which tired clients scroll up and down on their computer looking for informational nuggets.

I've used this technique quite successfully in new-product concept development, although its application could be much broader. For example, say a client is developing a new hair care line focused on individuals with fine hair. I'd post a number of flip charts in the back room with topics such as: consumer insights/habits and practices, problems/issues, desired benefits, reasons to believe, and sparks/conflicts/ debates (often great ideas evolve from friction). The clients would then place all their Post-its in these broad categories at the end of each qualitative session. When the debrief comes around, we have a volume of great information captured in the consumers' words and are ready to evaluate and start building product concepts.

Get re-engaged

Whether you're a moderator wanting to add more value to the client or a client who wants more from your moderator, some or all of these approaches might get you re-engaged with the consumer. At the end of the day, if you are armed with better information, know more about the consumer and have added a healthy dose of reality to the marketing approach, everyone is in a better place. Just remember: happy client and happy moderator equals a productive partnership. | Q

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Respondents lie and good ideas die

More than 500,000 focus groups were conducted worldwide in 2005, according to FocusVision. That's a 2.2 percent increase over the previous year. Yet we read that focus groups are in decline, are not scientific and have no ROI. The reality is that the criticisms of focus groups have created some myths that have been perpetuated over the years - myths that hurt the qualitative research industry.

At the same time, the industry stands to learn lessons and can continue to improve itself by exploring key issues that relate to some customers' and consumers' perceptions of the discipline. This article will examine 10 often-heard myths relating to focus groups.

Let's start with a story from the IT world. In early 2007, IBM rolled out a major upgrade to its Webconferencing and instant-messaging software called Lotus Sametime Version 7.5. The software sports enhanced features that make it easier for users to create and manage Webconferences, and to connect with other instant-messaging platforms in business settings, thereby relieving an administrative burden for IT managers.

This product rollout was a bit different for IBM. The company was used to talking primarily to IT and technical staff, but Lotus Sametime Version 7.5 is also a desktop function for non-technical businesspeople. Therefore, IBM needed insights from both groups that would allow it to maximize end users' product understanding and IBM's brand relationship with business consumers.

A combination of focus groups and in-depth interviews, conducted by Qualitative Research Consultants Association (QRCA) member Bernadette DeLamar of Business

Strategy Research, elicited some crucial insights for IBM. For example, instant-messaging and Webconferencing technology have delivered significant benefits for customers and have resulted in a real acceleration of business activities. Many of the new capabilities tested, however, were difficult for ordinary business users to understand because of the IT jargon used to explain them. A user-friendly vocabulary that would be effective in advertising to end users was a major outcome of the focus groups. In addition, IT decision makers saw themselves as contributing real business value because they were introducing technology that would enable management to easily communicate and expedite decision-making. This insight became the basis of content for market-

Dispelling the myths about focus groups



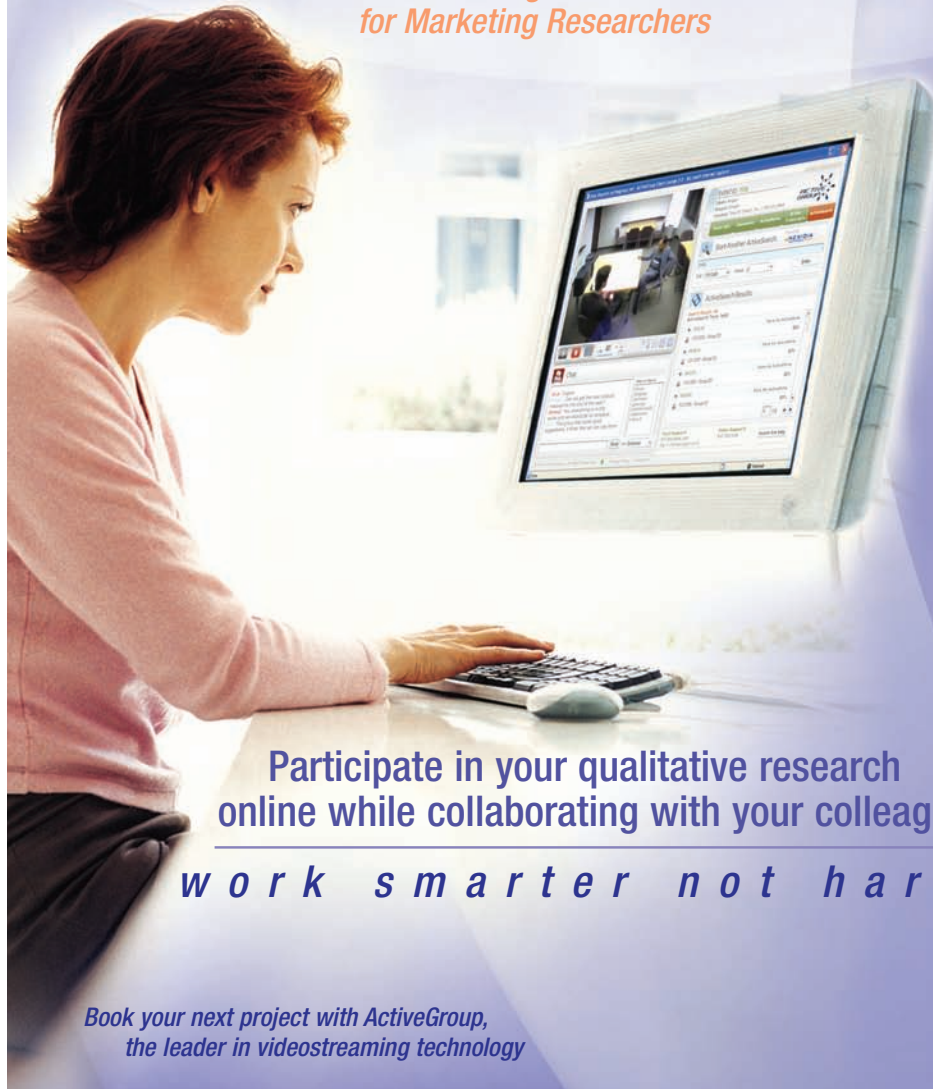
By Steve Richardson

Editor's note: Steve Richardson is director of communications for the Qualitative Research Consultants Association, St. Paul. He can be reached at 314-367-7359 or at steve.richardson2@sbcglobal.net.



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ing messages that echoed the words of IT respondents who said that they were enabling their firms to “conduct business in real time.”

“These critical insights helped us shape the product launch strategy and execution,” says Carol Galvin, IBM’s senior segment analyst, who sanctioned the qualitative research effort. “There are moments in every good focus group that give us ‘aha’ insights that are just critical to communicating properly to our various customer segments.”

One might assume that a company like IBM would care only about “measurable” metrics. But the company used qualitative insights (in addition to quantitative data) to develop and adjust a major product rollout – which leads us into our first issue.

Myth 1: *Quantitative data is what really speaks to client decision makers due to measurable ROI.*

In this age of measurement metrics, qualitative researchers often find themselves defending against

the perceived lack of statistical significance of focus groups – and even apologizing for it. In their paper “Quit Apologizing: Rethinking the Limitations of Limitations,” QRCA members George Balch of Balch and Associates and Christopher Herbert of The Insight Group/Focused Thinking explain, “In our work to dispel some of the myths which led to the perceived superiority of quantitative research over qualitative, we’ve collected many disclaimer statements in qualitative research reports from colleagues in the U.S. Many show a distinctively negative tone – ‘a note of caution,’ ‘not projectable,’ ‘not scientific.’ These statements warn readers and even apologize that the research is not, well, quantitative.”

Here’s a case in point. A 2006 study conducted by Alan Janssen, health communications specialist at the Centers for Disease Control and Prevention (CDC), tested the response of pediatricians and infant caretakers to a new vaccine to pre-

vent rotavirus – one of the most common illnesses in young children. Through various focus groups, researchers Dick Tardif of the Oak Ridge Institute for Science and Education and QRCA member Mark Herring of Market Directions Inc. learned something very important. While pediatricians embraced the idea of a new vaccine, the overall response to recommending the vaccine was tepid due to the history with a previous vaccine. The response from infant caretakers was also muted due to a general lack of awareness of the need to vaccinate, coupled with a somewhat blasé attitude toward rotavirus. Based on these findings, the CDC altered its communications approach to physicians. While not measured in quantitative terms, this research effort delivered significant ROI for the CDC.

The qualitative research community owes it to clients to help them understand (and sell up) the fact that qualitative research provides

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emotional reactions and deep-seated customer beliefs that cannot be extracted using quantitative methods. Clients don't have to choose one over the other - in fact often both methods are used. A great example of ROI is conducting a qualitative study that significantly changes a project before a quantitative test, thereby preventing an expensive mistake. In today's environment of "measure, measure, measure," we can't lose sight of "understand" - and qualitative research is the discipline that helps us do that. The numbers rarely speak for themselves.

Myth 2: Focus groups are in decline.

The qualitative research industry has battled some high-profile criticism of focus groups, including one well-known chief marketing officer who declared "I'm killing all our focus groups" - and got a lot of press for it. In fact for a time, criticizing focus groups became fashionable in some marketing circles. But guess what? Focus groups remain enormously popular - and for good reason. Focus groups are growing because the majority are conducted with a well-defined purpose, and they elicit truthful, deep-seated emotions from participants. In short, they are useful tools that perform an important marketing function that is hard to replicate.

Myth 3: Focus group participants are often people with too much free time on their hands.

Any step in the market research process can be done well or be done poorly - and the selection of focus group participants is no different. While underqualified participants may be motivated by the wrong reasons, properly selected subjects can offer amazing insights. So what does this mean for the qualitative research industry? First, don't rush the process. Some clients hurry their way through research, including recruiting focus group participants, and we must insist on taking the proper amount of time to find the right people. In addition, we should do the best possi-

ble job of screening the suppliers who help us find participants. We must help guide them into using the proper screening techniques and qualifying questions and simply not allow the selection methodology to be incomplete, rushed or overly simplistic.

In his paper "What's Wrong with Focus Groups and How To Do Them Right," QRCA member George Silverman of Market Navigation Inc. says, "Focus groups are not a process of asking small bunches of people for their up or down votes on products and their reasons to justify their opinions. They are a rich laboratory in which we get people to tell stories, react to each others' stories, share feelings and express their values, passions, highest hopes and deepest fears in a variety of ways, often non-verbally or by other means that try to bypass their defenses." In other words, overly simplistic focus groups conducted with improperly selected participants is the real problem - not the actual discipline of focus groups.

Myth 4: Focus groups can be used to get quantitative data like that found in surveys and rankings.

Calling surveys and ranking discussions a "focus group" is a common external misconception thanks to many TV shows and news reports that talk about "focus group testing." Some clients that do little qualitative research may bring this misconception to a project. It is important for researchers to clarify that quantifying response to a marketing message, creative execution or advertising campaign is a useful tool for marketers but it is not qualitative research - it is not a focus group. Qualitative research gets at feelings, beliefs and emotional responses on a particular topic, not a quantitative rating. A researcher may ask participants to rank an idea or product on a scale, but that is usually designed as a first step to get the respondent to dig into an idea and elicit qualitative insights.

Myth 5: Consumers don't (or can't) express their true feelings in a focus group.

Focus group critics say that participants often give what they believe is the most rational response, or say what is socially acceptable in a peer setting, or what they think will make them look good or look smart. A participant's responses may not always reflect his or her true feelings or attitudes. To access these below-the-surface feelings, experienced researchers use projective techniques to bypass respondents' rational controls and let them express feelings they have trouble voicing in a standard question-and-answer format.

Myth 6: Focus groups alone are enough to unearth people's opinions, motivations and feelings.

When well-conceived and -executed, focus groups in and of themselves can be a sufficient tool to satisfy qualitative research needs. But more and more often, top brands are using focus groups in conjunction with other qualitative (and quantitative) methods like in-depth interviews, online research, ethnography, dyads, mini-groups and telephone focus groups. Research buyers are recognizing the unique strengths that different qualitative tools offer, and are working more frequently with their research partners to incorporate multiple research tools to maximize customer insights.

Myth 7: Good ideas die in focus groups because consumers are not ready to accept new concepts.

QRCA member Judith Langer of Langer Qualitative addresses this myth in her book *The Mirrored Window*. She says: "Qualitative research offers researchers the opportunity to probe what underlies consumers' reactions. If an idea meets immediate respondent rejection, a good researcher explores the reasons why, whether the product might fit a real need and what, if anything, could change respondents' minds. Do the respondents lack knowledge? Are they anxious about newness or are they rejecting



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specific features? Is there a deeper resistance? The moderator can explore respondents' reactions when given additional information or after learning of advantages they haven't yet seen. The moderator can also explore potential changes in the product or service or in the communication."

Myth 8: *The researcher doesn't need extensive background on the research project or the unstated*

research objectives.

Some buyers hire a researcher as a "vendor" who can simply run a focus group by following discussion guides and writing a good summary report. That researcher may have a great reputation or be referred by a trusted source, so simply "doing their thing" fulfills the requirement for some buyers. However, clients who understand the real value of qualitative research know that treat-

ing the researcher as a partner - someone who understands the company, the scenario, the various influencers at play, and, yes, the internal politics - can deliver a far better qualitative research project. Clients may withhold information in the belief that too much background might sway the researcher or bog them down with information that doesn't appear to impact the study. But just like any other trusted supplier, the qualitative researcher with a well-rounded understanding of the project will deliver far more value in the end.

Myth 9: *Clients always know what they want out of research efforts and methodologies.*

There are many savvy clients who understand the discipline, the methodologies and how to achieve desired results, but just as many are seeking consultation and expertise from their research provider in order to help them determine the best methodologies. And some clients may think they understand qualitative research, but they might appreciate additional insight on the proper methodologies. Being able to coach, guide and consult with clients is one of the most important pieces of expertise a researcher can offer his or her clients. A consultative partnership leads to better results, and moderators may need to educate their clients to think of them in that way.

Myth 10: *It is important for the researcher to stick to the discussion guide because clients expect it.*

In most cases, the discussion guide should be just that - a guide. Great focus groups use the guide to direct questioning and focus the session, but the real gems of insight are often gained by encouraging interaction, dialogue, digging deeper, understanding motivations, responding to what's being said and improvising. Focus groups are one of the best research methods for this type of valuable interaction, and it is their flexibility that makes them so. | Q

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ing the researcher as a partner - someone who understands the company, the scenario, the various influencers at play, and, yes, the internal politics - can deliver a far better qualitative research project. Clients may withhold information in the belief that too much background might sway the researcher or bog them down with information that doesn't appear to impact the study. But just like any other trusted supplier, the qualitative researcher with a well-rounded understanding of the project will deliver far more value in the end.

Myth 9: *Clients always know what they want out of research efforts and methodologies.*

There are many savvy clients who understand the discipline, the methodologies and how to achieve desired results, but just as many are seeking consultation and expertise from their research provider in order to help them determine the best methodologies. And some clients may think they understand qualitative research, but they might appreciate additional insight on the proper methodologies. Being able to coach, guide and consult with clients is one of the most important pieces of expertise a researcher can offer his or her clients. A consultative partnership leads to better results, and moderators may need to educate their clients to think of them in that way.

Myth 10: *It is important for the researcher to stick to the discussion guide because clients expect it.*

In most cases, the discussion guide should be just that - a guide. Great focus groups use the guide to direct questioning and focus the session, but the real gems of insight are often gained by encouraging interaction, dialogue, digging deeper, understanding motivations, responding to what's being said and improvising. Focus groups are one of the best research methods for this type of valuable interaction, and it is their flexibility that makes them so. | Q



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Best practices for online qualitative research

You may have tried an online qualitative method and were disappointed or maybe you haven't taken the leap to online yet at all. Or perhaps you're already a convert and just want to find ways to improve on a good thing. Regardless of where you are now, this two-part series of articles will give you a guide to how to get the most out of it.

In total, we'll give you 26 best practices across a number of critical areas that are central to conducting online qualitative research. In this first installment we will consider 16 ways to improve online moderating.

1. Provide an engaging introduction and clear instructions.

Your participants' first impressions are important for setting the tone and expectations. Just as for in-person interviewing, you need to immediately establish rapport and make your participants feel welcome. Recognize, too, that even though they agreed to participate, your respondents may not be entirely comfortable with participating in an online interview and may be uncertain about what is going to be required of them.

Put everyone at ease by letting them know that spelling and grammar don't matter - what matters is what they have to say. Provide clear, easy-to-read instructions in both their e-mail confirmation as well as in the introduction once they've logged in.

2. Warm up your respondents before diving into the topic at hand.

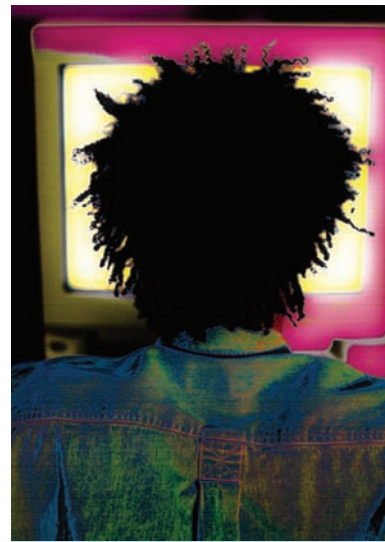
Your first few questions should further work to develop rapport and make participants comfortable. Start with asking them to introduce themselves, just as you would in an in-person group. Respond with similar information about yourself so long as it's not germane to the primary discussion topics.

Give them an open-ended question that allows them to share broadly about the topic at hand, even if you won't include it in the analysis. For example, if you are going to be evaluating advertising for a new digital camera, ask them: "Tell us about what kinds of pictures you've been taking lately and what you've been doing with them."

3. Use a chatty, informal style for your questions and include a variety of question formats.

Written discussion guides can seem cold, formal and sometimes repetitive. Go out of your way to make yourself seem human by using a style that's similar to the way you talk. Don't ask the same question

Part I: 16 ways to improve moderating



By Berni Stevens

Editor's note: Berni Stevens is CEO of TechFocus Research Inc., Exton, Pa. She can be reached at 610-880-3500 or at bstevens@techfocusresearch.com. This is the first of a two-part series on best practices for online qualitative research. Part two will appear in the July issue.



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over and over again, even if you're trying to get at the same thing across a number of concepts, ads, features, etc. After all, this isn't a quantitative survey, so controlling for variation in question wording isn't really necessary. And sometimes, we need to ask a question in a variety of ways to get at what we're looking for. If, for a series of concepts you find that a particular question style is eliciting a richer response, then you can probe

using the variation that is most evocative for the respondent.

4. Ask oodles and oodles of probing questions.

This is exploratory qualitative, so ask as many questions of your respondents as you would in an in-person group. Asynchronous groups allow for greater consideration of responses and probing than face-to-face groups. Probing questions will show that the moderator is engaged

and interested and will often inspire respondents to be likewise engaged.

5. Infuse a little humor.

If you'd use humor in an in-person group, then use it online, too, especially in probes and additional requests for information! Humor can help to establish empathy and defuse tough situations. Studies have also shown that when one uses or experiences positive humor, the whole brain is involved, not just one side, and that there's more coordination between both sides. Just keep it good-natured and don't make it too personal or at all vicious.

6. Encourage interaction with other participants.

If you're opening up the discussion so that all participants can see others' responses, then make sure all know that you expect them to read what's been posted by others and react. As a moderator, you should point out particular responses and seek to gain agreement or disension, just as you would in an in-person environment. You're only going to get out of it what you put in.

7. Include visuals that are easy for participants to view.

Images can be included as response stimuli and they make the interview more interesting, too. Be careful, though, to make images and video easy for participants to view. Respondents need to be instructed on how to change the size of the whiteboard to view the entire image. For long text descriptions, make sure your participants know to scroll down if needed to read the entire description. Sometimes, it may be advantageous to have multimedia open in a separate browser window, particularly when respondents are to interact in some way with the stimuli.

8. Incorporate suitable projective techniques.

If you would use projective techniques for in-person qualitative interviews, why not use them online, too? Many, like free associations, visualizations, storytelling and personification, can easily be employed online. Even the ones that



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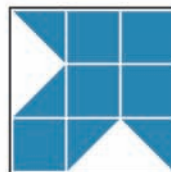
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require physical sorting or drawing could be accomplished with a little creativity.

9. Deal with problem respondents offline.

Don't deal with issues concerning a participant's lack of participation, dominance, inappropriate responses or other troublesome behavior within the discussion format. Even if the interview format is set up so that participants can't see others' responses, your interviewee may forget that and be resentful that you chastised them. An offline, personal e-mail that is tactful and sensitive is your first line of action. If that doesn't work, then you may just have to dismiss the participant.

10. Encourage expressions of emotion.

The perceived difficulty of capturing emotion in an unfiltered way is a primary concern for many when it comes to online qualitative. And, as discussed above, there may be some times when it's better to utilize in-person interviewing when it's critical

to gauge visceral response. Emotion, though, will be expressed if respondents care about the topics being explored and they may be more willing to share their emotions because of their visual anonymity.

In an online environment, there are a number of ways that you can encourage and effectively capture emotion. First, tell your respondents that you want them to convey emotional reactions when they have them! They can do this through:

- words, e.g., "This makes me very angry!";
- emoticons, e.g., >:-O (provide a key for respondents' easy reference);
- CAPS, underlining and italicizing.

Also, your own questioning can go far in soliciting emotional response. For example, ask participants "How does this make you feel?" or "Tell me about the emotions this brings up in you."

11. String related questions into one.

Avoid choppy questions that will yield short, choppy responses. If you ask a series of related questions, par-

ticipants will respond with fuller responses, mirroring the moderator's style. Further, you will actually get more information from this approach as participants will typically respond first to the issues that are most important to them.

12. Don't just ask "why."

I know, you think that understanding why is a major component of what qualitative is all about. But if you just ask why, especially in an online environment, you're likely to be met with a short, superficial answer. If you ask "Why did you purchase a Sony camcorder instead of a Panasonic one" you may hear "Because it had better features." If you instead ask "Tell me some of the reasons that you purchased a Sony camcorder instead of a Panasonic?" you might get "Because it has a longer battery life, better zoom function and it costs about the same." Additionally, you risk putting a respondent on the defensive when you merely ask why because they feel like they are being



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challenged or attacked.

13. For multi-day asynchronous interviews, pace the questioning and leave room at the end for emergent issues.

Many have a tendency to front-load questioning. If you demand too much up front, you're going to overwhelm your participants, and they may hold back on how much they say because you're asking too much and you haven't yet gained their trust and committed involvement. You should have already given your participants an idea about the amount of time they can expect to dedicate each day. Now you need to make good on your promise if you are going to keep people coming back.

Additionally, questions will arise during the first days' interviews that you'd like to get additional insight on. If you've built a discussion guide that's equally divided over the interview duration, then you may not have time to address the issues that emerge over the course of the first days' input.

14. Keep clients engaged and involved.

It's critical in any study to involve the ultimate users of the research throughout the process. This is especially true of qualitative, where the process is more fluid and observers can have a strong impact on the direction the interviewing takes should interesting or unexpected responses arise.

The good news is that it's more convenient to observe online qualitative. Client teams don't have to travel to be involved, so more should be able to participate. On the other hand, because clients haven't isolated themselves from the office and all its interruptions and demands, it's more likely they will get distracted and not log in. So, if you're going to keep your client team engaged you need to make it easy for them to do so. Incorporate a practice login on a demo site to get everyone comfortable with the venue and how to post comments. Then, send fre-

quent reminders and, if it's an asynchronous group, send some of the more interesting quotes to pique their interest.

15. Create screen names that make it easy to identify specific segments in non-interactive groups.

It's hard enough keeping track of all the information that's being shared in large, asynchronous sessions, but add on top of that various segments which you want to analyze separately and the moderator's and client observers' heads will be spinning trying to keep up with it all. One helpful method is to assign screen names/handles that are coded to reflect their segment membership. For example, a current product user is Sarah (C) and a non-user is Andrew (N).

16. Choose a moderator who understands the unique challenges and nuances of online qualitative.

Many skills used in in-person interviewing easily translate to an online environment, like knowing how to ask questions and the right probes and how to keep everyone participating. However, the moderator you've used for years for in-person qual may not conduct online qualitative in a way that makes the most of the medium. Ask them what the differences are and if they can't give you at least a handful of the tips in this article, then you should look elsewhere.

Complexity is greater

Moderating any kind of qualitative interview requires numerous learned and innate skills. The complexity is even greater when you move your interviews to an online environment. You can, though, effectively moderate online interviews with the right guidance. Take advantage of a few of the tips we've provided above and you'll see a sharp improvement in the quality of your experience.

Look for the second part of this series, where we'll look at best practices for recruiting, incentives and group composition, in the July issue of *Quirk's*. | Q



THERE'S A GAP

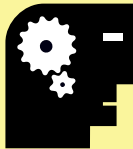
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The metamorphosis of a qualitative researcher

Imagine the following conversation between a qualitative research consultant (QRC) and a potential client. The client requests a specific research methodology that doesn't match the research objectives and asks for limited involvement from the moderator:

QRC: "May I take your order?"

Client: "Yes, I'd like four focus groups in two cities."

QRC: "What are your research objectives?"

Client: "We would like to understand what drives consumers to purchase personal health care products and how they emotionally connect with our brand."

QRC: "Would you like a discussion guide and report on the side?"

Client: "No, thanks. Just the focus groups please."

QRC: "OK, four focus groups in two cities coming right up. That will be \$xx,xxx."

It's far-fetched, but most of us who specialize in qualitative research have found ourselves in similar situations, reduced to functioning as an order-taker rather than as a consultant.

Since moving into a qualitative role over a year ago, the hurdles I've encountered as a QRC have surprised me. Once believing that moderating would be the most difficult skill to master,

I've discovered that learning to be a qualitative research consultant is by far the most significant challenge. By consultant, I mean being responsible for the functions of design, moderating and analysis for every project.

Ultimately, I am responsible for the outcome of the research, and I share in the client's strategic decisions made and actions taken

as a result of the research.

I believe the research profession as a whole makes it challenging to assume the role of consultant in a qualitative context. Most market researchers have limited qualitative experience. After all, only about 14 percent of all research is qualitative (2006 ESOMAR Industry Study on 2005). Therefore, QRCs have a unique responsibility to ensure qualitative research is implemented properly. This can only be done by assuming a partnership role, working directly and proactively

Part III: Sit at the table, not behind the counter



By Kelly Heatly

Editor's note: Kelly Heatly is a qualitative research consultant with M/A/R/C Research, Irving, Texas. She can be reached at 972-983-0452 or at kelly.heatly@marcresearch.com. This is the third installment of a three-part series tracking Heatly's progress as she enters the world of qualitative research. The first article appeared in the December 2005 issue, the second in May 2006. Both are viewable at www.quirks.com.



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with clients - in other words, taking a seat at the table.

This realization hit me while attending the Qualitative Research Consultants Association (QRCA) conference last September as a new member and attendee. Inspired by the thoughts shared by J. Robert Harris, chair of the QRCA Professionalism Committee, who wrote the article, "The Death of Professionalism," published in the association's July 2006 *Connections* newsletter, I turned my focus on mastering consultancy as a way to really make a difference in my career, in my client's mind, and more indirectly, in the qualitative profession.

The premise for Harris' article is powerful if not controversial: he believes the QRC profession is declining due to the "reneging of our professional responsibility to provide consultation, instead of just moderating, in the research that we conduct for our clients." By willingly accepting moderation-only projects, known as walk-ons, Harris believes QRCs are slowly "eroding the efficacy, the reliability, and therefore the overall confidence that research buyers have in qualitative research." The potential damage to the value of qualitative research is real. After all, many will never forget Malcolm Gladwell's scathing criticism of focus groups in the 2005 *Advertising Age* article "Focus Groups Should Be Abolished," in which his keynote speech at the American Association of Advertising Agencies'

Considerations	Appropriate Applications
Group vs. One-on-One	Group: Use when ideation is needed (i.e., product/creative development and determining unmet marketplace needs). One-on-One: Use when the research involves a choice among multiple offerings (group bias is avoided), depth of behavioral and attitudinal understanding is needed, or the topic is sensitive.
In-person vs. Phone/Web	In-person: Use if the creative process is enhanced by being in-person or when presentation of two-dimensional stimuli is required. Phone/Web: Use when it's not feasible for respondents to meet at a central location, sample of respondents is too small for one locale, or the client's budget or timeline does not allow for travel.
Snapshot vs. Temporal	Snapshot: The qualitative interaction will capture the necessary information in one session. Temporal: The information requires interaction with respondents over time such as accomplished through online discussion boards.
Discussion-based vs. Observational	Discussion: Use when a discussion, in-person or via phone/Web, effectively captures the information needed. Observational: Appropriate when motivations for certain behaviors cannot be easily articulated by respondents due to lack of self awareness.
Respondent Factors	Certain respondent demo/psychographics in conjunction with the subject matter may overshadow all other considerations.

Account Planning conference published was excerpted.

The bottom line: While it's difficult to take responsibility as a consultant, being an order-taker is a huge disservice to the client and to the qualitative research profession as a whole.

If you are a QRC and often find yourself in an order-taker role, here are three "consultant" approaches I've learned to follow when faced with a new qualitative project, each focusing on the design and analysis functions, listed in order of priority.

Ideal approach: become a partner (sit at one end of the table)

Design

First and foremost, my responsibility as a consultant is to recommend the best research methodology. I base my recommendation on a comprehensive set of considerations (Table 1) provided to me by my qualitative mentor, Will Leskin, vice

president of qualitative services at M/A/R/C Research.

Once the methodology is determined, my responsibility as a QRC is to write the discussion guide, even if the client provides a draft or outline of the topics they want discussed. In fact, I have found that a collaborative approach works best and ensures all are on the same page. Ideally, QRCs take these proactive steps to ensure the discussion guide captures the desired information:

- Participate in an initial kick-off meeting to revisit research objectives and confirm how the information will be used on the back end.
- Prepare a guide incorporating all aspects discussed in the kick-off, not just those outlined in the RFP. Including an explanation or purpose statement for each section of the guide helps the client understand how the discussion will accomplish research objectives.
- Walk the client through the guide verbally instead of sending it

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via e-mail and waiting for approval. This way, the client's research team understands your proposed approach, and the guide receives buy-in from all members involved.

Analysis

Once moderating is complete, I believe a QRC's most important function and obligation is making sure the information captured is analyzed objectively and communicated in a way that leads to good strategic action. At this stage, the QRC should "remain at the table" with the client, providing an objective voice among those with a vested interest in the outcome of the study. Ideally, QRCs provide a topline report a few days after fielding followed by an executive-ready full report within a few weeks.

Plan B approach: find a happy medium (sit somewhere at the table)

If a client is set on a specific research plan that is at odds with what you would recommend, I have found there is always a way to meet in the middle that will still accomplish research objectives while pleasing the client.

Design

Some clients prefer a specific methodology based on past experience or comfort level. For example, I have found that many clients prefer focus groups because they like to observe as many respondents as possible "live" from the back room, often alongside other members of the research team. But what if study objectives can't be met with focus groups? A solution is to meet in the middle by recommending a "second-best" approach or a hybrid methodology that still meets research objectives.

An example of a second-best approach: A client once requested focus groups for a qualitative concept test where the objective was to elicit reactions and understand the emotional response to multiple concepts.

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While we recommended in-depth interviews (IDIs), the client was more familiar with focus groups and had an entire team of internal stakeholders to please. Therefore, we offered quads as a way to present multiple stimuli to respondents and gain a greater depth of insight per respondent yet still net the same number of respondents using a group methodology.

An example of a hybrid methodology: With this approach, a portion of the research is conducted using a methodology preferred by the client, and the remaining research is conducted using a more ideal format. For example, I worked on an IDI project where we needed a geographically-dispersed, hard-to-reach respondent. The client did not embrace the concept of conducting telephone in-depth interviews, despite teleconferencing options with private lines for backroom discussions. So, we conducted the first round of IDIs at a facility with backroom viewing, debriefed and

made revisions, and then conducted the remaining interviews by phone.

Analysis

Some clients intend to analyze qualitative findings and prepare the final report themselves, hiring a QRC for moderation only. In this case, the QRC could request a debrief following the groups and provide a detailed summary of the debrief in lieu of a full report. Similarly, for clients who intend to write the discussion guide for the moderator, the QRC could set up a brainstorming session prior to fielding to talk through topics and discussion ideas.

Last resort approach: pass (don't sit at the table)

Some clients are very knowledgeable about qualitative study design, methodology, and analysis and only seek to fill the moderator function. However, if you believe the research plan set forth will not meet objectives

or you are unable to consult on design or analysis, consider passing on the business. While this can be financially painful, you'll likely avoid the cost of failed research and lost opportunity.

A foundation

Having these three distinct approaches provides me with a foundation on which to stand as a consultant. As I continue on my qualitative research path, I realize the enormous fulfillment of actually helping a company improve its products and services based on the information I elicited, analyzed and communicated back in an objective and action-ready format.

This sense of fulfillment is only possible when I act as a consultant and partner to my clients, providing them with my expertise in research design, moderating and analysis. But enough about me. Qualitative research as a whole is strengthened when clients reap the benefits of sound, objective and powerful insight garnered by working together at the table with our clients. | Q

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Merging the old and the new

It has become increasingly critical for the market researchers to provide deeper analysis, more compelling insights and highly actionable recommendations generated from the consumer research we conduct. The general response to these changing and stringent demands among qualitative researchers has been mixed and ranges from developing new approaches, offering ethnographic methodology, engaging in more projective techniques, offering technology as a solution and in some cases, making the decision to stand firm by positioning themselves as “traditional qualitative” shops (i.e., sticking to doing focus groups and facility-based research).

At the same time, there has also been a trend over the last few years away from conducting traditional qualitative approaches, toward the desire for approaches that are able to offer deeper connections with consumers.

“You get a different level of understanding when you’re standing in a consumer’s bathroom with them showing you what’s in their medicine cabinet. You start to understand their world and how your product fits or doesn’t with their needs. This is where those great insights start from. You get those ‘aha’ moments and know you’re on to something,” says a senior manager at a pharmaceutical firm

It appears the debate has shifted from merely discussing the significant value of qualitative research (especially in relation to quantitative) to that of discussing how to use new approaches and how to find ways of getting richer insights.

Case studies show value of mixing traditional and technology-based qualitative approaches

Instrumental factor

Often we find that new qualitative approaches or innovative techniques are equated with using or leveraging technology itself. This is perhaps due to the fact that technology has increasingly become an instrumental factor in the way our world in general operates. It impacts our lives both professionally and personally and has forever changed the way we think about communicating and connecting with each other.

Examples abound on how technology has changed qualitative research

approaches. One significant advance is the invention of online focus groups. Others include “lurking” in blogspots, videotaping consumer behavior as it naturally occurs, using Webnography, providing video



By Marla Commons

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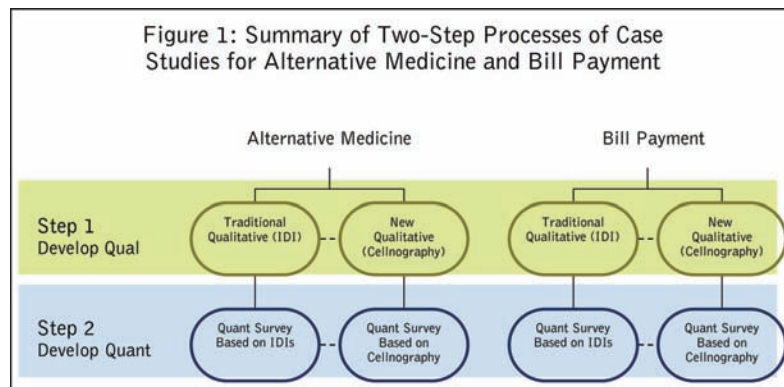


reports in addition to traditional written reports.

The pioneering spirit of qualitative researchers around the world will undoubtedly continue on the path of developing new approaches in qualitative research by using technology. So at this point it is important for us as a community to stop and ask ourselves what purpose these innovative approaches ultimately serve in the world of qualitative, including:

- Do they selfishly serve to make us appear smart and innovative?
- Do they simply serve as a new approach for those who are tired of traditional focus groups and facility-based research?
- Do they ultimately better equip us with deep consumer insight?
- Can they better inform subsequent quantitative research?
- Should they be viewed merely as another option, one of many approaches in a toolbox of qualitative offerings?

These questions are important ones for us to consider, as we have a responsibility to recommend the best methodology/approach even when it's tempting to do something different. The question becomes not whether we can provide new approaches - we have certainly proven that we can. The general question at hand appears to be whether traditional approaches we



have used for years will fall out of fashion entirely or whether they will continue to play a significant role in consumer understanding. In order to address this question, our firm undertook a study to determine the real value that two completely different qualitative approaches can have on a study.

Case studies

We chose the areas of finance and health care as case studies to demonstrate how the right qualitative methodology can inform different yet equally compelling results in some cases, and ultimately, how different methodologies can inform different subsequent quantitative research questions. As shown in Figure 1, in Step 1 of these case studies, two completely different qualitative research methods were utilized to highlight how the

qualitative methodology implemented impacts the level and type of insight generated.

The first approach utilized a more traditional qualitative methodology: in-depth, face-to-face interviews (IDIs). The second approach utilized Research International's Cellnography approach in which consumers are given a camera and video-enabled cell phone and are asked to capture their behavior and feelings with the provided phone (i.e., "Please use your cell phone to take a video and describe what types of alternative medicines you use."). Both of these methods were utilized in the bill payment and the alternative medicine case studies.

Traditional qualitative method: IDIs

For the bill payment IDIs, respondents were asked questions such as what bills are currently being paid, what methods of payment are utilized and why, and, importantly, questions surrounding respondents' attitudes toward automatic and online payment options versus more traditional forms of payment such as check writing. They were also asked general questions about attitudes toward paying bills and were asked to describe their typical bill payment routine. For the alternative medicine portion of the IDIs, respondents were questioned about their awareness and use of different alternative medicine options, attitudes toward alternative and traditional medicines and future likelihood of adopting alternative medications.

New method: Cellnography

In both the bill payment and alternative medicine areas of investigation, respondents were given a packet of

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homework tasks containing several different assignments they could complete using the provided camera and video-enabled cell phones. All assignments were designed to capture respondents' real-time behavior and feelings with the specific topic in mind. As they completed assignments, respondents uploaded and e-mailed back their photos, sound clips and videos.

Examples of assignments for the bill payment case study included having



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Figure 2: Example 1 - IDIs Are Appropriate When a Robust Understanding of Topic is Needed

Finding from qualitative methods	Quant survey question developed as a result of the qual approach
IDIs <ul style="list-style-type: none"> • Able to get a thorough listing of bills paid per month • Indication that alternative medicine is defined as a robust category 	<ul style="list-style-type: none"> • Detailed listing of options of bills paid on a regular basis is provided (survey offers up to 20 different types of bills) • Detailed options of types of alternative medicine respondents use
Cellnography <ul style="list-style-type: none"> • Only major bills listed as top-of-mind (mortgage, car, etc.) • Alternative medicine is defined rather narrowly, primarily as pills and herbs 	<ul style="list-style-type: none"> • Less detailed and thorough listing of bills paid on a regular basis • Narrow options listed for alternative medicine that limits the definition of an alternative medication
Insights generated as a result of combining IDI with Cellnography approaches: <p>Bill payment: Bank offers a service to help respondents set up an account from which those "little annoyances" can be paid automatically with an e-mail summary each month confirming they have been paid</p> <p>Alternative medicine: Most respondents define alternative medicine as pills, but would be open to alternative medicines that also involve non-pill treatments if alternative medicine makers communicated their positioning/offers differently</p>	

respondents video themselves during bill payment, asking about attitudes toward different bill payment options, and interviewing a friend or family member about how they pay bills in order to further understand how they view their own attitudes. Examples of assignments for the alternative medicine case study included asking about what alternative medicine means/how it is defined, usage of and experience with alternative medicine options and using video cameras to show where alternative medicines are stored in the home.

Results for both the IDI methodology findings and the Cellnography methodology findings for both the alternative medicine and the bill payment case studies were then analyzed and reported independently, yielding four separate qualitative reports. The contrasts found in the comparison of these reports make up a good part of the foundation from which our analysis and recommendations are drawn.

Advantages and limitations of IDIs/traditional qualitative research

IDIs certainly are the most appropriate qualitative approach when the facilitator needs to obtain in-depth and detailed information in a specific period of time (as evidenced in our case studies), especially in relation to

focus groups where the individual may speak only occasionally.

Second - and this is perhaps the most critical reason for doing IDIs or focus groups - is the fact that these types of approaches enable researchers to understand consumers' attitudes, perceptions, needs and wants - the original basis from which these approaches were applied in the first place.

In the age when qualitative research is sometimes used to make critical business decisions on whether to launch a product or whether to rename a service, the purpose and function of qualitative research can sometimes get lost. The purpose mistakenly becomes about measuring response to products or ideas rather than using the approach to explore reasons and motivations for responses. Comparing, as we did in this study, the results of new and traditional qualitative approaches helps us to enumerate the advantages and disadvantages of each methodology (Figure 2).

The question-response format of traditional qualitative methods such as IDIs ensures that specific and detailed information is gathered, yet it can also limit the ability for respondents to be spontaneous and more natural in their responses - simply because they are either in an unnatural context such as



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a research facility or in the case of ethnographic approaches because of the mere presence of the facilitator in one's home.

Because qualitative researchers make a living from being able to read people and make them feel comfortable, it is sometimes easy to forget that despite best efforts, an inherent limitation in any facilitator-led research is the impact of their presence on the respondent. This is true in both facility and more natural-based ethnographic approaches and is an inherent limitation in qualitative research in most cases. With knowledge of social norms, respondents often feel the need to justify themselves before others to show that they know when they fall outside the boundaries of what others (including a moderator) may constitute as normal or acceptable behavior.

Finally, in traditional qualitative research, respondents are asked to explain their thoughts or behaviors, and as a result of the situation, their responses are usually conscious and

Figure 3: Example 2 - The Impact of New Approaches Reveals Areas of Exploration

Finding from qualitative methods	Quant survey question developed as a result of the qual approach
IDIs <ul style="list-style-type: none"> The issue of asking about where respondents store their alternative medications was not in the realm of possible consideration as an area of questioning in this approach 	<ul style="list-style-type: none"> No survey question was developed to ask about where alternative medications are stored at home
Cellnography <ul style="list-style-type: none"> When asked to report on what alternative medicines are used, respondents used their video-enabled phones to show that they store alternative medicines in the kitchen as opposed to the bathroom, where regular OTC and prescriptions are stored 	<ul style="list-style-type: none"> The subsequent quantitative questionnaire developed from Cellnography approach included a question about storage locations for alternative medicines The quantitative questionnaire also included an attitudinal question regarding whether there is the possibility that respondents view alternative medicines more as a foodstuff/nutrient than a cure
Insights generated as a result of Cellnography revealing an unexpected area of exploration: The fact that alternative medicines are kept in the kitchen, separate from other medicines, implies that alternative meds are perceived as more of a nutrient than a cure	

methodical. Our attitudes are not always logical, though, and our decisions are not always made consciously – it is in these situations that innovative techniques are particularly relevant and can be used to better inform

subsequent quantitative research.

Benefits and limitations of a new approach vs. traditional qualitative

Unlike traditional qualitative approaches Cellnography does not

empowering insights

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enable the researcher to probe in order to clarify responses or enable any sense of real control over the type of information provided. However, this lack of contact and constraint allows us to tap into a level of consumer understanding while at the same time avoiding having the moderator's presence influence respondent behavior (despite the moderator's best efforts to minimize this impact). Engaging respondents in a blog community or using a methodology like Cellnography can avoid respondent posturing and give accurate insights into actual behavior.

An additional benefit of an approach like Cellnography is its ability to reveal the underpinnings of emotional or subconscious decision-making processes, offer insight through a breadth of knowledge about a topic, and reveal behavior outside the constraints of social consciousness and verbalization. It also enables researchers to understand real-time consumer behavior rather than relying upon recalled/remembered behavior (Figure 3).

It depends

So, how do we select the right approach, whether traditional or new? This is one of the most frequently asked questions by clients. Our advice on the matter is often rather simple

Figure 4: Example 3 - Benefit of Utilizing Both IDI and Cellnography Approaches Combined

Finding from qualitative methods	Quant survey question developed as a result of the qual approach
IDIs <ul style="list-style-type: none"> Respondents are likely to report their routine for paying bills, whether this involves sitting down at a desk on a regular basis or checking e-mail randomly throughout the month to ensure automatic payments have been made; variety of behaviors and patterns were found when it comes to bill payment 	<ul style="list-style-type: none"> Subsequent quantitative questionnaire enables respondents to select from a variety of behaviors and patterns of bill payment they use ("Which of the following best describes your bill payment behavior" with multiple options)
Cellnography <ul style="list-style-type: none"> In viewing respondents' assignments regarding how they would describe their pattern/behavior for bill payment, the videos they sent back indicate/hint that one's bill payment life is often quite similar to the status of their home organization skills (i.e., we observed that more organized homes in general were correlated to more organized methods of bill payment, including whether respondents have a particular place they keep bills or whether they are kept throughout the house 	<ul style="list-style-type: none"> Subsequent quantitative survey questions involved the addition of the following question: How would you characterize your bill payment style? <ol style="list-style-type: none"> Totally unorganized: I keep bills in multiple locations and am sometimes late on payments Fairly unorganized: I keep bills in mostly in one location and am rarely late on payments Fairly organized: I keep bills in one location and know generally when bills are due and pay them on time Very organized: I know exactly when bills are due and have a set system for paying them
Insights generated as a result of Cellnography and IDI approaches together: a case for combined methodologies	
The results of the IDIs and Cellnography <u>combined</u> were beneficial in determining the different patterns respondents have in how they approach bill payment and making this link to perhaps how they approach life in general	

and perhaps not the direct answer that many would like: it depends on the objectives of the research.

Newer is not necessarily better, just as the traditional methods are not necessarily always going to be the right answer. In fact, our experience with this research suggests that it is perhaps the combination of both the traditional and the new that may provide clients with the deepest insights possible. In our case studies we derived insight as much from the findings unique to one methodology as from nuances in similar responses across approaches (Figure 4).

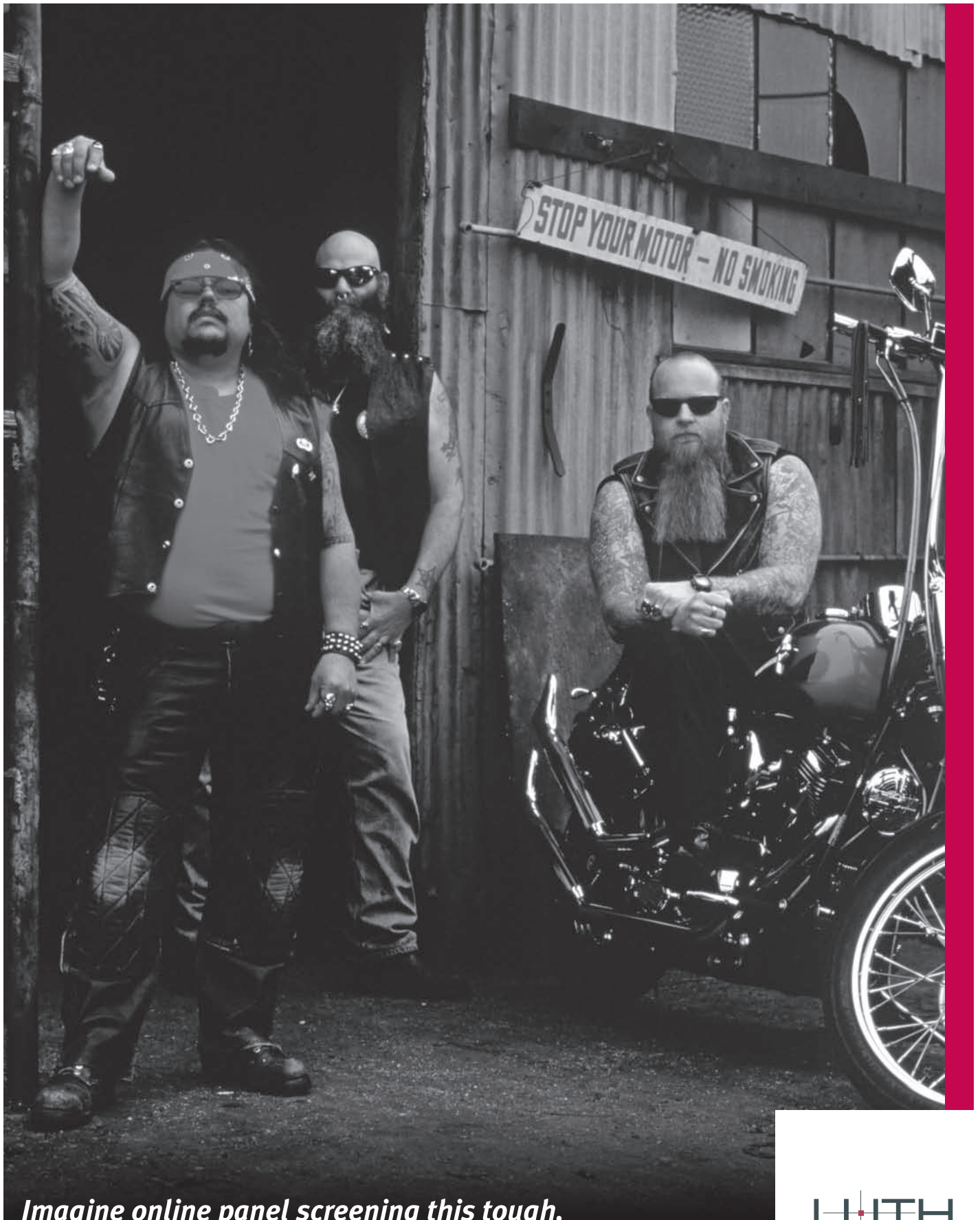
Consider the idea of a combination of facility-based interviews in conjunction with an approach like Cellnography or combining an ethnographic-based method with a facility-based technique as a way to provide more robust answers to research questions. Not only are the qualitative insights more fruitful and compelling, but there is the critical benefit of how these insights can powerfully inform subsequent quantitative work. | Q

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My purse, my life

“Diamonds are a girl’s best friend” is an adage I am fond of quoting. However, I recently had the privilege of conducting an interesting qualitative research study on a topic near and dear to my heart: handbags. As a result, I have come to realize that handbags can be considered – together with diamonds – one more indispensable member of a female’s close coterie of friends.

In 2005, handbags (aka purses and pocketbooks) dominated the accessories market in the U.S., accounting for over \$5 billion in sales. Consumer research from Mintel finds that British women are also becoming increasingly enamored of their handbags as sales there grew by 146 percent between 2000 and 2005 to reach an estimated \$680 million. Functionally, handbags are used to transport a woman’s essential daily items. Emotionally, however, they perhaps play a more powerful role, although current advertising for the category does not focus on the emotional threads which often tie women to their handbags.

For women, handbags are a form of identity and individuality, and, like the women who carry them, they may or may not have multiple identities. Regardless of whether a purse acts as a mini-office, a bag on wheels, a mini-pharmacy or snack bar, a mobile beauty salon, family photo gallery or as a nostalgic connection to a mother or grandmother, it is also a beloved and trusted accessory which either reflects a woman’s specific personality or provides a glimpse at her wannabe personality.

Handbags can also be used to instantly broadcast messages about a woman’s mindset, mood or life stage. The woman who is pushing a stroller and carrying a large, practical black purse might be resigned to the fact that it screams out “responsible young mother” rather than “trendy young woman.” Nonetheless, she knows that this is the one she needs because she is in her maternal life stage.

A handbag can also reveal whether a woman is into power and status, glamour and luxury or fun and fantasy. Using it to make a fashion statement is unquestionably appealing to women.

True essence

Regardless of its exterior, a handbag’s contents generally seem to reveal the owner’s true essence and soul. What is on the outside of the bag

Handbag makers should market the emotional aspects of owning their products



By Tanya Krim

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may separate one woman from another, but what is inside may unite them; a peek inside may reveal whether a woman is feeling overwhelmed and chaotic, or “together” and in control. In fact, many women seem to have a relationship with their bag which is similar to the one they have with a dependable and trustworthy female friend/confidante: It knows everything about her and her life.

On some occasions, however, it is undeniable that handbags appear to be more like good-looking, desirable men than close female friends as they become objects of women’s deep-seated, unbridled lust!

Most women also view their purse as their one and only real personal space, a kind of safe haven and security blanket, without which they feel naked and vulnerable. It carries all the items they need or might need,

and as a result of this, is synonymous with feelings of warmth, safety and togetherness.

Interestingly, women also perceive handbags to be the one and only piece of fashion without clear demarcations based on looks, size or age. While many may feel too old for certain styles of clothing or shoes, most believe that they have more leeway with crossing the young-old lines with handbags.



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Dearth of emotion

The emotional territory surrounding the handbag category is clearly enormous. Nonetheless, most women I recently spoke to readily testify to the dearth of emotion visible in contemporary handbag advertising.

In today’s world, handbag advertising tends to consist of print ads rather than TV. Although there are undoubtedly numerous handbag print ads to be found in the glossy women’s magazines and other upscale general-interest magazines, these print ads are not really very differentiated from each other.

When asked, female consumers mention that all of these print ads feature the handbag brand’s logo and iconography as well as beautiful, thin women with perfect hair – usually alone on the page with the product. The eye-catching, desirable handbag is usually displayed dangling off an elegant, long arm or shoulder, or alongside a pair of long, lean, perfect legs perched in an enticing pair of shoes. The visuals are unquestionably eye-catching and telegraph – albeit only via visual cues – product usage mood as well as easily comprehensible messages about the product along the lines of “If you buy this glamorous, sexy little evening bag, you too will get noticed/feel as sexy and beautiful as this woman,” or “You too can have fun if you buy this one!”

Women admit that they often lust after the handbag as well as the pair of shoes they see advertised in these handbag advertisements because they look stylish, sexy and eye-catching. However, as yet, no one brand of handbag appears to have differentiated itself in a relevant and memorable

way by using imagery, words or an insightful tagline to telegraph that the brand really “gets” how women feel psychologically and emotionally about handbags (or for that matter shoes). No manufacturer seems to be trying – directly and overtly – to move away from merely grabbing a share of wallet and to focus instead on also grabbing a share of heart.

Even the Manolo Blahnik handbag brand has not achieved relevant differentiation in the minds of many consumers – in spite of the fact that its Manolo Blahnik shoe brand counterpart began to feel more differentiated a few years ago because of its frequent presence in *Sex and the City* episodes.

Enticing and alluring

It is interesting that the status of handbag advertising today seems to be somewhat comparable to that of shoe print advertising: the lack of emotion in advertising campaigns for these products is perhaps all the more surprising as both handbags and

shoes are perceived by women to have particularly enticing and alluring facets which could be used to generate highly emotive and creative advertising.

Furthermore, sales of high-end handbags currently appear to be at an all-time high. An increasingly large number of women today confess that they suffer from handbag mania, and refer with pride to their wardrobe of handbags which caters to each of their many moods and style occasions. According to Judy N. – a manager in a New Jersey department store who has 25 years of experience working in the accessories department – handbags are now perceived to be an essential fashion item, one which women coordinate carefully with their outfits and replace frequently so that they consistently project as stylish an image as possible. Judy observes that women’s current desire to change their bags is matched by their increasing interest in investing in top-of-the-line handbags. She simul-

taneously remarks that while the “need” to place such emphasis on handbags seems to be fairly recent – arising perhaps in the past three to five years – she feels that the behavior is nonetheless a familiar one as it is reminiscent of women’s behavior with other important accessories – specifically watches or jewelry.

Walking around various high-end stores recently in upscale Bergen County, N.J., I could not help but marvel at the diversity of the women looking for their expensive handbag “fix.” Regardless of age, income or career path, women today certainly seem to understand that a beautiful, high-end pocketbook can simultaneously give them the emotional high they yearn for and telegraph to their female peers that they have class, taste and are where it’s at!

Importantly, marketers might also want to take note that some of these “women” are still in their teens, and many of them seem to already be gravitating to certain brands – including Coach and Betsey Johnson.

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Huge opportunity

There consequently appears to be a huge opportunity for one of the popular brands of handbag to be the first to market with an advertising campaign which layers on more meaning and emotion, and moves away from the old handbag “product is hero” formula. An ambitious handbag manufacturer might even try and position itself in a fresh and innovative way as the company

which is in the female “look good, feel good” business rather than just contenting itself with being “in the handbag business.”

The possibilities for the development of emotionally-resonant handbag advertising are endless. A brand might wish to position itself as the one which really gets that handbags or purses are a woman’s most trusted accessory and close friend. Or it might wish to position itself as the

ultimate lust-inducing, “can’t live without it” handbag; or as the quintessential female pick-me-up brand of handbag – one for each shade of a woman’s moods. Then again, it might prefer to position itself as the one which helps a teen girl-woman feel very together and sophisticated, or helps another woman project her wannabe personality.

Positioning itself as the brand which helps an older woman recapture a slice of her youthfulness also appears likely to spark an emotional chord. The reality is that no matter how much she notices the appearance of crow’s feet round her eyes, how desperately unhappy she feels about the collection of those unappealing extra pounds on her hips or derriere, or the discomfort caused by those pointy, sexy shoes she used to strut around in quite happily, a handbag can transport her back to her more youthful, carefree days. It can help her communicate to the world that she may have the experience of years but is still proud to retain that enviable, youthful sparkle.

Lockheart, a California-based handbag brand which launched in July 2006 and is currently available in boutiques and upscale department stores offers women some very beautiful, eye-catching, romantic-looking handbags. The price point is quite high, although brandishing one of these pieces on your arm is an uplifting experience: I know, because I have one! Maybe this will be the newcomer brand which begins to shake up the category!

The fact is that handbags and women have a close-knit, warm and satisfying relationship. In today’s often lonely, frightening and disappointing world, advertising which capitalizes on the “look good, feel good” aspects of life is likely to resonate particularly well with women. Because, no matter how intelligent, profound and analytical we are, we still also long to score points on the got-it-going-on-ometer! | Q



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Survey Monitor

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hours on average) managing their personal finances.

Time has become a predominant concern in India and China, where people feel rushed in their daily lives as they try to keep pace with their ever-changing environments.

Americans and Canadians, however, are much more likely to articulate their frustrations with time, indicating that they never have enough time and feel a great deal of stress.

- **Media usage:** The U.S. Census recently projected that Americans will spend five months in 2007 watching television, surfing the Internet, listening to radio and text messaging. According to IndicatorEDG, Americans are not alone in their seemingly extreme devotion to media. On average, people around the world spend 70 hours per week with various types of media, accounting for 42 percent of the 168 hours in a week.

The Chinese and Americans cer-

tainly share the same affinity for the Internet, despite the two governments' continuously different perspectives in international trade and currency policies. Both countries posted more than 19 hours a week of Internet usage in 2006. India is another country where Internet usage is accelerating.

When it comes to messaging, India and China both enjoy the most usage of SMS (2.8 hours per week) and instant messaging (five hours per week) with North America (U.S. and Canada) trailing the group. Entering into 2007, however, the usage of instant messaging will diminish, and SMS growth will slightly decelerate everywhere except in Scandinavian countries. Blogs will continue to be strongly embraced in China, Scandinavia and the U.S., which are already the global leaders when it comes to the amount of time spent reading and creating blogs.

Although watching television currently accounts for 20 percent of the total time people spend consuming

media in a typical week, time allocated for television is expected to shrink by more than 8 percent globally in 2007. Movie theaters across all countries are also anticipated to continue to see a similar decline in interest.

On the other hand, newspapers remain an attractive medium in India and China, where people are spending twice as much time reading newspapers as those in more developed countries. According to IndicatorEDG, one can expect 2007 to continue to be a good year for newspapers in India and China.

- **General worries:** Towards the end of 2006, the concern over a possible terrorist attack waned considerably in favor of concerns that were more immediate. Escalating health care costs, rising gasoline prices, declining moral standards, lack of retirement funds and declining educational standards now top the list of consumer worries in the United States. People are anxious for changes in policy and market priorities to address these key concerns in 2007.

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American concerns are, unsurprisingly, shared among people in other parts of the world. Declining moral standards is one of the top three overall worries across all borders. High concerns about declining environmental quality, escalating health care costs and lack of retirement funds also resonate with citizens of all countries. Regionally, Internet security is causing the greatest anxiety in Europe, Scandinavia and China.

Rising gasoline cost, on the other hand, affects India and North America most.

- Ideas to go: The overall health consciousness of consumers not only means continued prosperity for the organic food industry but also suggests the likelihood of more vertical integrations similar to the combination of CVS and MinuteClinic or CVS and CareMark. The rising cost of health care is especially trouble-

some to the U.S. economy, as health care spending represents more than 16 percent of the country's GDP while averaging 10 percent in most industrialized countries. Currently, businesses are bearing most of the costs associated with health care. This financial burden could result in the erosion of additional capital investment for corporate development and expansion, and subsequently diminish the country's innovative edge. The year 2007 could see stronger business initiatives in attempting to drive health care reform involving government policies, consumer responsibilities and business practices.

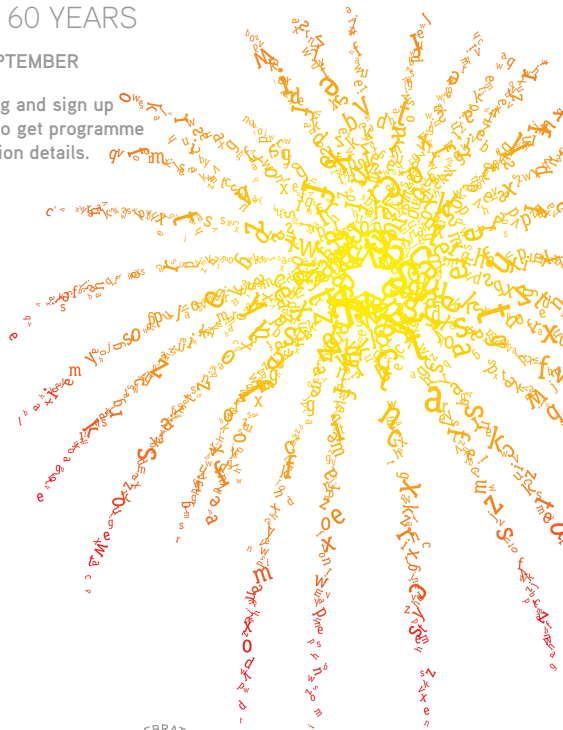
2007 will also produce an influx of technologies and services that further connect the offline and online worlds. Consumers' increasing reliance on the Internet manifests the universal desire for versatility in communication and information relevance. Consumer demand in these arenas can be attributed to innovative companies like LocaModa, whose Wiffiti technology allows people to text-message their thoughts and blogs to flat-panel displays in public and social venues, creating a space where the boundaries between cyberspace and the real world are invisible. Another example are the new quick-response (QR) codes included on McDonald's food packaging in Japan. They appear old-fashioned to the naked eye, but the QR codes are actually quite sophisticated and can be scanned by mobile phones to retrieve ingredient information. If traditional businesses can create solutions to address the consumer desire for technological innovation they will also thrive.

Furthermore, emerging indicators suggest a need to mix and match marketing channels to adapt to regional lifestyle habits. The Web is no doubt the center of attention. But there are clearly regional variances in media preference. In countries like China where Internet security is of great concern, it would be smart to leverage the traditionally well-recognized newspaper medium to lend credibility to online businesses. In the U.K., where new online ideas such as

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blogs are not as popular with consumers, radio is a medium still favored by many segments in the population.

IndicatorEDG is a quarterly tracking study monitoring six general indicators about consumer sentiment and market forces: consumer confidence, happiness and life goals, weekly activities (work and leisure), likelihood to purchase technology products, general worries, and what's

hot and what's not. Each wave of the study surveys 6,000 respondents randomly selected worldwide from Luth Research's online SurveySavvy panel. The ending sample for each country is weighted to reflect the population demographics documented by the census or government statistical bureau in the individual country. For more information visit www.luthresearch.com.

Traditional outlets spur online product searches

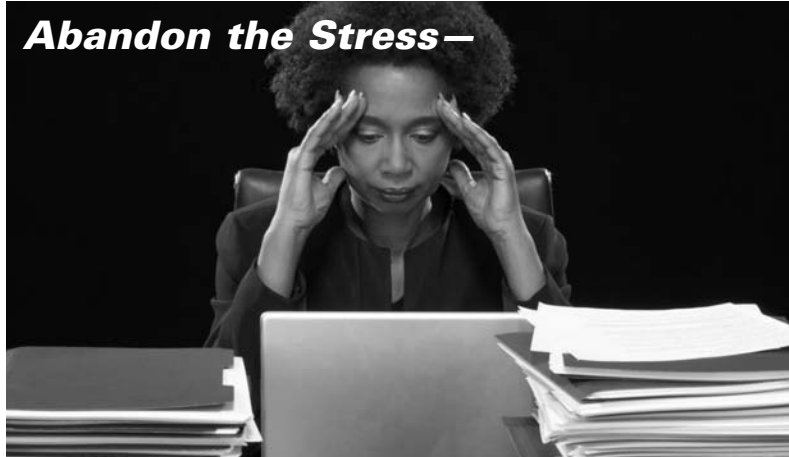
Though there is no question that online searches are becoming more popular among consumers, what exactly triggers an online search? In a recent analysis of BIGresearch's Simultaneous Media Survey (SIMM 9) conducted for the Retail Advertising and Marketing Association (RAMA), consumers say they take cues from traditional advertising to determine when and where to search for merchandise online.

Consumers said that they were most motivated to begin an online search after viewing advertisements in magazines (47.2 percent), newspapers (42.3 percent), on TV (42.8 percent) and from reading articles (43.7 percent). Women were more likely than men to be motivated by coupons (41.8 percent vs. 29 percent) and in-store promotions (29 percent vs. 24.5 percent) while men were more driven to start an online search based on a face-to-face conversation (36.1 percent vs. 29.5 percent).

"When it comes to advertising, retailers always need to be careful not to put all of their eggs in one basket," says Mike Gatti, executive director of RAMA. "While search engine marketing continues to be a popular strategy, retailers should not lose sight of traditional advertising channels to promote products and services."

After searching, online consumers said they are most likely to communicate with others about their search through face-to-face discussion (68.9 percent), though e-mail (53.1 percent), telephone (50.9 percent), and cell phone (30 percent) communication were also popular choices. Young adults 18-24 are also taking advantage of an influx of new media, communicating about services, products and brands by instant messaging (37.5 percent), text messaging (23.7 percent) and through online communities like MySpace and Facebook (20.6 percent).

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“Retailers must realize that online communities are now producers and through their stories are able to extend the distribution of traditional media with a trust and truth not even approximated by mass media,” says Joe Pilotta, vice president of Worthington, Ohio-based BIGresearch.

Shoppers continue to use the Web as a resource before determining which items to buy and where. According to the survey, 92.5 percent of adults said they regularly or occasionally research products online before buying them in a store. Products that are most often researched online before being purchased in a store include electronics (50.8 percent), apparel (31.9 percent) and appliances (27.0 percent). Men were twice as likely as women to shop for automobiles online (20.2 percent vs. 10.2 percent), though women research home décor products more often than men (18.9 percent vs. 11.6 percent).

The SIMM 9 survey is a survey of

15,287 consumers which is conducted two times each year. SIMM measures consumption across media, retail channels and products. SIMM 9 was collected in November and December, 2006. The SIMM Survey has a margin of error of plus or minus 1 percent. For more information visit www.bigresearch.com.

Americans map the path to good corporate citizenship

According to the second edition of I-Rep, a biannual survey on perceptions of large companies conducted by Paris-based researcher Ipsos, Americans overwhelmingly say that companies do not pay enough attention to their social and environmental responsibilities (60 percent) and should work to improve the wider impacts of their products and services (77 percent). Only one-third (35 percent) say that companies are listening and responding to the public’s concerns.

Americans identify environment and wildlife protection as the area

large companies should contribute to the most (45 percent), placing this slightly ahead of fighting poverty in the United States (42 percent) and education and schools for children and teens (33 percent).

Americans say providing affordable health care for employees (39 percent) and dealing with inflation and oil prices (31 percent) are the two most pressing issues for large companies over the next few years. However, the environment places fifth in issues mentioned (cited by 20 percent), on par with managing costs (21 percent) and competing with emerging economies (21 percent).

“While quality of products and services is the most important factor for consumers judging companies, environmental and social responsibility is as strongly related to goodwill as customer service and value for money,” says Annabel Evans, vice president of Ipsos Public Affairs and author of the study. “Companies that are spontaneously thought of as

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particularly responsible are primarily recognized for their environmental initiatives.”

That said, Americans find it difficult to judge the social and environmental performance of individual companies. Only one-third (35 percent) can think of a company they feel acts particularly responsibly and no company stands out as a leader among more than 2 percent of the population. “Companies that receive high ratings for social and environmental responsibility are those with widely reported philanthropy or environmentally-friendly products,” says Evans. “Companies that attract high negative ratings and are criticized across most aspects of their business tend to operate in sectors that are perceived as environmentally damaging and are corporate goliaths in terms of their overall revenue and profitability.”

Companies that put good social, environmental and ethical behavior at the core of their business have great potential for winning the hearts, minds and wallets of increasingly ethics-savvy consumers. Americans who are aware of good corporate practices act on their knowledge: one in five (19 percent), for example, have bought a product or service because of an established link to a charitable organization. However, most consumers find it difficult to know which products are better for society and the environment (61 percent) and they claim that more information about companies’ social, environmental and ethical behavior would influence their purchase decisions (62 percent).

Ipsos has identified a group of men and women who are more vocal and opinionated about companies than others and could help large corporations spread the word about their ethical standpoint. Around one-quarter of Americans fall into the group Ipsos calls Ethical Advocates: people who regularly advise their friends, family, colleagues and others to use – and more often, not to use – a particular company due to their beliefs about

whether it acts responsibly or not.

Online interviews were conducted as part of Ipsos’ i-Rep American Public program between February 23 and March 5, 2007, with a nationally representative sample of more than 1,000 adults aged 18 and over from Ipsos’ U.S. Internet panel. The margin of error is ± 3.1 . The research investigates the expectations for and perceived performance of major companies from a variety of sectors on a range of reputation metrics. For more information visit www.ipsos.com.

Ads sent via cell phone must have payoff for recipient

According to a study by Harris Interactive, Rochester, N.Y., a surprising 35 percent of adult cell phone users are willing to accept incentive-based advertisements. Of these adults, 78 percent say the best incentive would be cold, hard cash, followed by free minutes (63 percent), free entertainment downloads (e.g., ring tones, games; 40 percent) and discount coupons (40 percent).

The research examined current levels of consumer interest in mobile phone advertisements, preferred advertising formats and the willingness of consumers to be profiled.

“Historically, U.S. mobile phone users have been resistant to receiving mobile phone advertisements, but according to our research, cell phone users are more willing than ever to receive advertising,” says Judith Ricker, president of the marketing communications research practice at Harris Interactive. “To make their mobile campaigns more effective, advertisers should take note of how cell phone users are most interested in being contacted. Advertisements need to have a clear value proposition, be relevant and allow recipients to control how they are profiled.”

The survey further reveals that over half (56 percent) of those who are at least somewhat interested in receiving ads on their cell phone say they would prefer to receive them

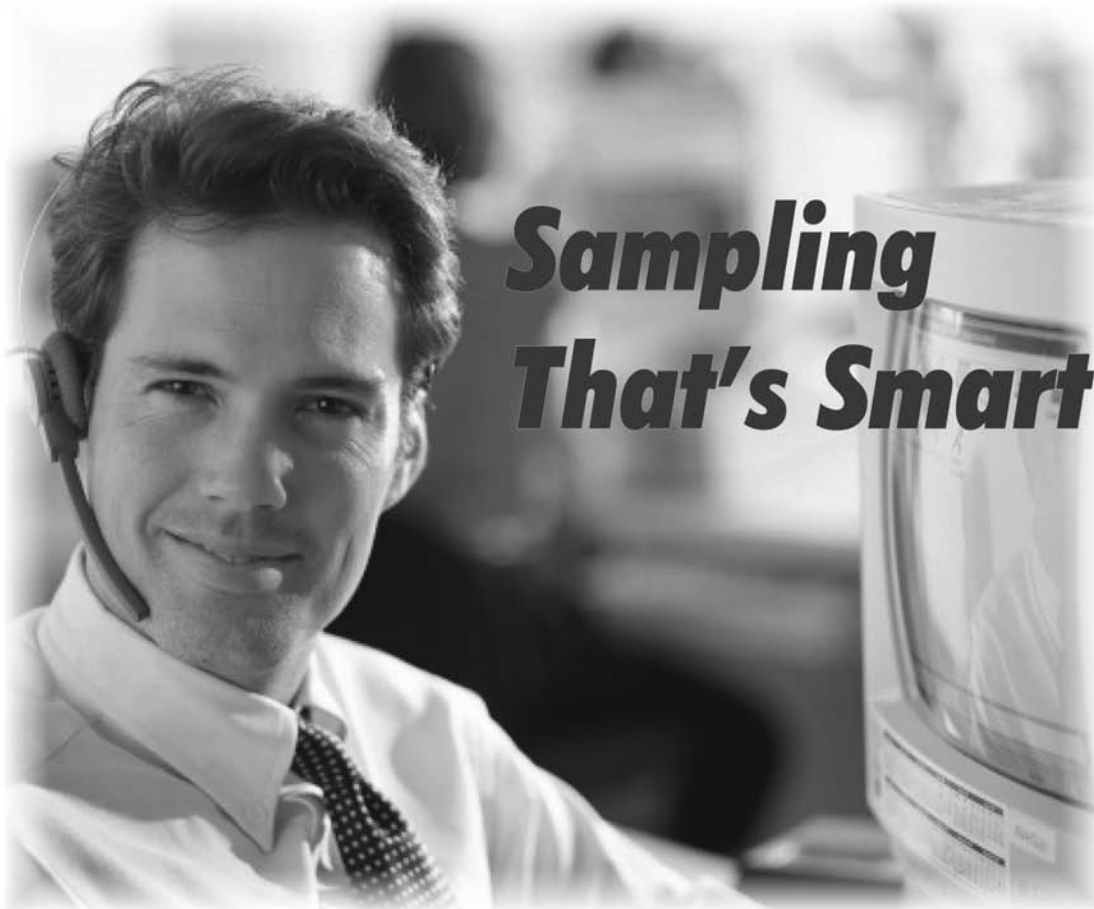
via text message, while 40 percent would like to receive them as a picture message. Less than one-quarter of adults would choose to receive them as videos (24 percent), while others would have them transferred automatically to e-mail (23 percent), as a voice message (22 percent) or something else (7 percent).

Just under three-quarters (70 percent) of respondents who are at least somewhat interested in receiving mobile advertising are also willing to provide information about themselves to their cell phone provider in exchange for an ability to customize the service to their needs. Among them, 30 percent are willing to receive the ads for the right incentive, while 20 percent would receive them if they have control to turn them on or off and 20 percent are willing to receive the ads if they can choose who the information is sent to.

Adult mobile phone users who are at least somewhat interested in mobile advertising also feel that the following could lower the pain associated with watching these ads:

- the ability to opt out (66 percent);
- choosing the type of ads to be received (56 percent);
- choosing the number of ads to be received in a given period of time (48 percent);
- providing a profile of desired areas of interest so only specific ads are sent (43 percent);
- different/discounted plan if ads included (42 percent);
- choosing specific times when ads would be received (40 percent).

This online survey was conducted within the United States between February 7 and 14, 2007 among 903 adults (aged 18 and over) who use a cell phone. (344 say they are at least somewhat interested in mobile advertising if some incentive were offered.) Data were weighted to reflect the total U.S. adult population on the basis of region, age within gender, education, household income and race/ethnicity. For more information visit www.harrisinteractive.com.



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Product and Service Update

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Experian launches U.K. cultural classification system

Information firm Experian has created Mosaic Origins, a research tool designed to predict the ethnic and cultural origins of Europeans based on their name. Developed with the assistance of Professor Richard Webber from University College London, it is designed to help organizations in the public sector understand the cultural, ethnic and linguistic origins of their users, customers and employees.

Mosaic Origins has been developed using pattern recognition techniques to identify the ethnic and cultural origins of almost a million family and first names in use in the European community. Each name is linked to a part of the world where, based on a probability score, the holder, or the holder's forebears, are likely to have originated. Mosaic Origins is available as a desktop software application that enables organizations to code, profile and target

communications to their customer lists, users or employees. It can also be used at a postcode level to identify the communities where particular minority groups have established themselves. For more information visit www.experian.co.uk/business.

Studies spotlight customer experiences with credit card sites

San Mateo, Calif.-based Keynote Competitive Research is now offering two new competitive research studies examining credit card issuer Web sites, one focused on credit card customers and the other examining prospective customers. Each of the Keynote studies examines the customer experience (UX) and service levels (responsiveness and reliability) of credit card Web sites. Together, the studies offer detail on the performance and competitive positioning of leading credit card issuers.

The Keynote Customer Experience Rankings for Credit Card Customers examines the online experience of more than 1,600 credit card customers as they interacted with nine leading credit card Web sites. A separate study, the Keynote Customer Experience Rankings for Credit Card Prospects, examines more than 2,000 prospective credit card customers as they interacted with these same leading card sites.

The studies detail how each card site performs versus competitors across key business objectives, including online adoption and customer acquisition. Each of the studies captures more than 250+ metrics for each site and provides competitive rankings in multiple categories. The studies also outline the key areas of site performance, such as ease of exploring online services and ease of applying online, which have the most impact on a site's

success. Finally, the studies offer credit card issuers steps they can take to improve their online performance, with a particular focus on improving customer satisfaction, online adoption and customer acquisition.

The Keynote Service Level Rankings for Credit Card Web Sites examines the technical performance of leading credit card Web sites, including site responsiveness and reliability. The study uses Keynote's Transaction Perspective product to measure and monitor Web site performance. For more information visit www.keynote.com.

ESRI updates ArcReader

ArcReader 9.2 from ESRI, Redlands, Calif., is a free desktop mapping application that allows users to view, navigate and print maps and globes created with the ArcGIS Publisher extension. ArcReader 9.2 includes enhanced viewing of maps with ArcGIS Online services, which provides a series of ready-to-use online map, globe and other GIS services. With ArcReader 9.2, users can also print maps with customized titles. New features of ArcReader 9.2 include: tools to mark up maps; the ability to customize the map title for customization; 3D navigation tools for enhanced visualization of a user-defined location; 3D developer control for creating custom 3D applications; and a measure tool for one-button clicking to measure features and areas. ArcReader 9.2 is available as a free download for Windows, Solaris and Linux platforms. For more information visit www.esri.com/arcreader.

Assess concepts early with MarketTools test

San Francisco research firm MarketTools Inc. has added its new MPI (Market Potential Index) Concept Test, designed to help companies identify product

ideas with the strongest business potential and increase the odds that those products will succeed. An MPI Concept Test is conducted early in the concept development process, before marketing plans and traditional volume estimation models are done.

Additionally, interactive text analysis helps to refine high-impact ideas by gathering consumer reactions to specific components of the concept description. For more information visit www.markettools.com.

TNS platform combines qual and quant online

London-based researcher TNS has launched TNSInsightTvLive, a live and interactive online research platform that uses video to combine qualitative and quantitative survey capabilities.

TNSInsightTvLive is an online survey in which respondents can see a survey moderator via a real-time video link. The use of video allows the moderator to show a range of visual material – such as new product concepts or trial advertisements – and to investigate responses to uncover the whys behind the data. For more information visit www.tns-global.com.

Briefly

Evansville, Ind., research firm ARSgroup is now offering its ARS Impact Campaign testing and diagnostics system, which assesses and breaks down consumer persuasion and recall and their drivers across any touchpoint, e.g., TV, radio, cell phones, print, Internet, etc. For more information visit www.ars-group.com.

London-based Research Now has expanded its online fieldwork service, the OmniTaxi, to the Nordic marketplace. The Research Now Nordic OmniTaxi has been designed to provide clients with a flexible alternative

to omnibus research. Coverage includes Denmark, Sweden, Norway, Finland plus the option to extend to further European markets including Russia. For more information visit www.researchnow.co.uk.

Australian research software developer QSR International has partnered with Tokyo firm Hulinks to deliver qualitative

research software programs in Japanese. Japanese versions of QSR's XSight and NVivo 7, along with Japanese training material, marketing collateral and a technical support service will be available in Japan later this year.

Hulinks will also provide training and technical support to QSR's Japanese customers. For more information visit www.qsrinternational.com.

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Research Industry News

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Edison, N.J.-based research firm **Schlesinger Associates** has acquired **Convention Research Services**.

Asia-based research process outsourcing firm **Pulse Group** has acquired a new facility in downtown Kuala Lumpur, Malaysia. The facility will expand its floor capacity by 300 percent and is expected to house a CATI center and an additional 30 research professionals. Pulse will maintain its operations team in its Cyberjaya office.

Cincinnati advertising agency **Freedman, Gibson & White** (FG&W) and Cincinnati research firm **The FocusMark Group** have combined to create Focus/FGW, which will have 106 employees and combine the two firms' existing slate of services. Kim Sharp of FocusMark will be the vice president and managing partner of the new firm and will own 25 percent of the company. Three executives of the ad firm - Tim Gibson, Kim White and John Beard - will work as vice presidents and will each own 25 percent of the combined company. Sharp purchased the share owned by Leigh Miller, who had been president of FG&W. He will work at the combined company for a limited time as a consultant.

Louisville, Ky., research firm **Wilkerson & Associates** has leased a 6,000-square-foot facility in Henderson, Ky., to conduct telephone surveys. The Henderson facility will be the company's fourth call center in Kentucky.

Alliances/strategic partnerships

Dallas research firm **Parks Associates** and **EH Publishing**, a Framingham, Mass., information firm, announced a research alliance that combines the firms' knowledge of the home systems integration market to provide data and analysis

on the players, market dynamics and future trends for the channel.

Sherman Oaks, Calif.-based **Qualitative Insights** has formed a partnership with **Telemundo** to manage a new focus group facility at Universal City Walk in Hollywood. Qualitative Insights will conduct Hispanic recruiting and research for the network in City Walk. Qualitative Insights is the qualitative and field division of Los Angeles-based Interviewing Service of America.

Association/organization news

The Qualitative Research Consultants Association (QRCA) has responded to the growing global influence and buying power of Latinos by forming the Latino Special Interest Group (SIG), which is dedicated to serving QRCA members who work with Latino and Spanish-speaking markets. The Latino SIG is open to QRCA members interested in learning about and enhancing the quality of qualitative research done with Hispanic populations globally. In a press release, Latino SIG Chair Ricardo Lopez said the group will focus initially on several objectives, including: developing guidelines on how to conduct research in Latin America, which poses different challenges and opportunities when compared to research conducted in the U.S. and Canada; promoting qualitative research among Latino college students by developing a strategy to bring more college students into qualitative research; and developing a best-practices guideline that serves as a model for conducting research with Hispanic populations in the U.S.

The Marketing Research Association (MRA) announced that the RIVA Training Institute has officially endorsed MRA's Professional Researcher Certification (PRC) program. RIVA joins the American Marketing

Association, the Advertising Research Foundation, the Council for Marketing and Opinion Research, the Interactive Marketing Research Organization, Marketing Research Institute International and the Burke Institute as endorsers of this program. As endorsers, RIVA's education programs will carry PRC credits, will utilize the official PRC logo and the two organizations will cross-promote each other's educational offerings through the Certification program.

New accounts/projects

The Media Rating Council accredited **Arbitron's** Houston Portable People Meter (PPM) radio ratings at the end of January. Arbitron had previously stated that it would not commercialize the PPM radio ratings service in Houston until it had received MRC accreditation for those ratings.

Separately, **Cox Radio** has agreed to encode its four radio stations in Houston for the Portable People Meter radio ratings service. In addition, **Casanova Pendrill**, a Costa Mesa, Calif., agency specializing in integrated Hispanic communications, has signed an agreement for Portable People Meter radio ratings services in Houston, New York and Los Angeles. And **Clear Channel Radio** has signed a multi-year agreement for the Portable People Meter radio ratings service in Philadelphia. Clear Channel Radio also agreed to encode its radio stations in Philadelphia with the start of the March PPM survey period.

Panel research firm **eCGlobalPanel** has licensed the Confirmat MR platform from Norway-based **Confirmat** for its online market research activities. Separately, **Netquest**, a Spain-based provider of online fieldwork and panels, has licensed the Confirmat On-Demand software solution.

San Mateo, Calif.-based Internet and mobile test and measurement

firm **Keynote** and **Mauro Usability Science**, a New York user experience design and testing firm, are working with MTV Networks to better understand how viewers are interacting with MTVN's Virtual Laguna Beach virtual world. Mauro Usability Science and Keynote, using the Keynote WebEffective solution, began working closely with MTV Networks' internal research executives prior to the launch of Virtual Laguna Beach in September 2006 and are continuing to do so to help develop and test the online user experience.

Company earnings reports

In preliminary 2006 numbers for Germany-based **GfK Group**, the company increased sales by 18.7 percent from EUR 937.3 million to EUR 1,112 million. With organic growth of 5.4 percent, GfK also outperformed sector growth, which experts estimate at 4 percent to 5 percent. Adjusted operating income improved by 20.3 percent to EUR 150 million. This corresponds to a margin of 13.5 percent after 12.6 percent on a like-for-like comparison, i.e., including the NOP World companies for the full year, representing an increase of 90 basis points. The company has achieved its sales target in full and the margin is on the upside of the target range of 13.3 percent to 13.6 percent, which in itself was upgraded in mid-November 2006.

In 2006 results, U.K.-based **Taylor Nelson Sofres** reported revenue of £1,004.2 million, an adjusted operating profit of £99.5 million, an adjusted operating margin of 9.9 percent, adjusted earnings per share of 12.7p and an operating profit of £74.4 million.

In 2006, Paris-based **Ipsos**' revenues totaled EUR 857.3 million, an increase of 19.4 percent on 2005. At constant scope and exchange rates, revenues were up 6.5 percent. Ipsos' organic growth in 2006 was lower than its long-run average and

than had been anticipated at the start of the year. There were two main factors behind this. First, the market grew a little more slowly than expected, by around 5 percent. Second, some Ipsos companies, particularly in western continental Europe, experienced tough conditions at the end of the year. This was partly due to problems in client industries such as fast-moving consumer goods, and partly due to the slow pace in rollouts of contracts won in the last few months of the year. These difficulties mainly affected the marketing research segment, which suffered from insufficient global integration.

NetRatings Inc., New York, announced financial results for the fourth quarter and year-ended December 31, 2006. Revenues for the fourth quarter of 2006 were \$22 million, a 24 percent increase compared to revenues of \$17.7 million for the fourth quarter of 2005. Revenues for the year ended December 31, 2006 were \$81.8 million, an increase of 20 percent compared to revenues of \$68 million in 2005.

Net income for the fourth quarter 2006 was \$99,000, or \$0.00 per share, on approximately 35.2 million shares. This compares with a

net loss in the fourth quarter of 2005 of (\$713,000), or (\$0.02) per share, on approximately 36 million shares. During the fourth quarter of 2006, NetRatings recorded \$778,000 in acquisition-related expenses in connection with the October 2006 proposal from The Nielsen Company B.V. to acquire the outstanding publicly held minority interest in NetRatings. NetRatings' results improved from a net loss of (\$8.4 million), or (\$0.23) per share, in 2005 to net income of \$2.8 million, or \$0.08 per share, in 2006.

For the fourth quarter of 2006, on a pro forma EBITDA basis (a non-GAAP measure that reflects net income/loss excluding interest income/expense, taxes, depreciation, amortization of intangibles and stock-based compensation, as well as acquisition related expenses), NetRatings earned \$3.3 million, or \$0.09 per share, compared to pro forma EBITDA income in the fourth quarter of 2005 of \$779,000, or \$0.02 per share. NetRatings significantly improved its full-year pro forma EBITDA results during 2006, moving from a loss in 2005 of (\$1.2 million), or (\$0.03) per share, to earnings of \$10.1 million, or \$0.29 per share, in 2006.



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Names of Note

continued from page 12

director, **Lorraine Bordegaray** account director, **Jessica Blatt** account manager, **Rakhee Gupta** senior project manager, **Avnish Kumar** senior developer, and **Graham Zeller** senior Flash developer. In the firm's New York office, **Craig Schneiderman** has been named media planner and **Ben**

Sider and **Jeff Wilson** have been named project manager.

Stamford, Conn., research firm *InsightExpress* has expanded its media custom panels group, naming **Christina Pugliese** custom panel manager and promoting **Meredith Klein-Hertzel** to respondent acquisition coordinator. In its online media measurement group, the firm named **Nichol Carranza**, **Samar**

Habibi and **Gabriel Calemmo** project manager and **Marina Feldman** market research analyst.

Elizabeth Turner has joined *M/A/R/C Research*, Irving, Texas, as research associate. **Ravi Raina** has been named research manager and **Pat Savolt** has joined as project support specialist in *M/A/R/C's* Greensboro, N.C., office.



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New York-based *TNS* has appointed **Lincoln Merrihew** to lead the automotive segment for North American custom research.

Carrie Antonelli has been hired as market research analyst in the *Catevo Agency* division of Raleigh, N.C., marketing communications firm *The Catevo Group*.

Cheryl Pearson-McNeil has been named senior vice president, communications, at Schaumburg, Ill.-based *ACNielsen U.S.*

Harris Interactive, Rochester, N.Y., has named **Bill Salokar**, **John Jessen** and **Sandy Lasky** to the position of vice president, senior consultant.

Kevin Novak has joined the Chicago office of *Star Data Systems Inc.* as vice president, business development.

India-based business process outsourcing firm *Cross-Tab* has named **Kumar Mehta** global CEO. He will be based in the U.S.

Denver research firm *iModerate* has named **Marc Silberstrom** vice president of strategy and business development.

Seattle-based *Informa Research Services* has promoted **Jackie Weise** to vice president and **Mitchell P. Thornburgh** to director, business development and client services, field and tab division.

2007

Focus Group Moderator Directory



This directory was compiled by mailing, e-mailing and faxing listing forms to companies that we identified as having on-staff focus group moderators. Each firm was given a free basic listing including one on-staff moderator and also had the option to purchase a write-up, company logo insertion and industry and market cross-reference categories. We list nearly 1,200 moderators at over 1,000 firms.

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

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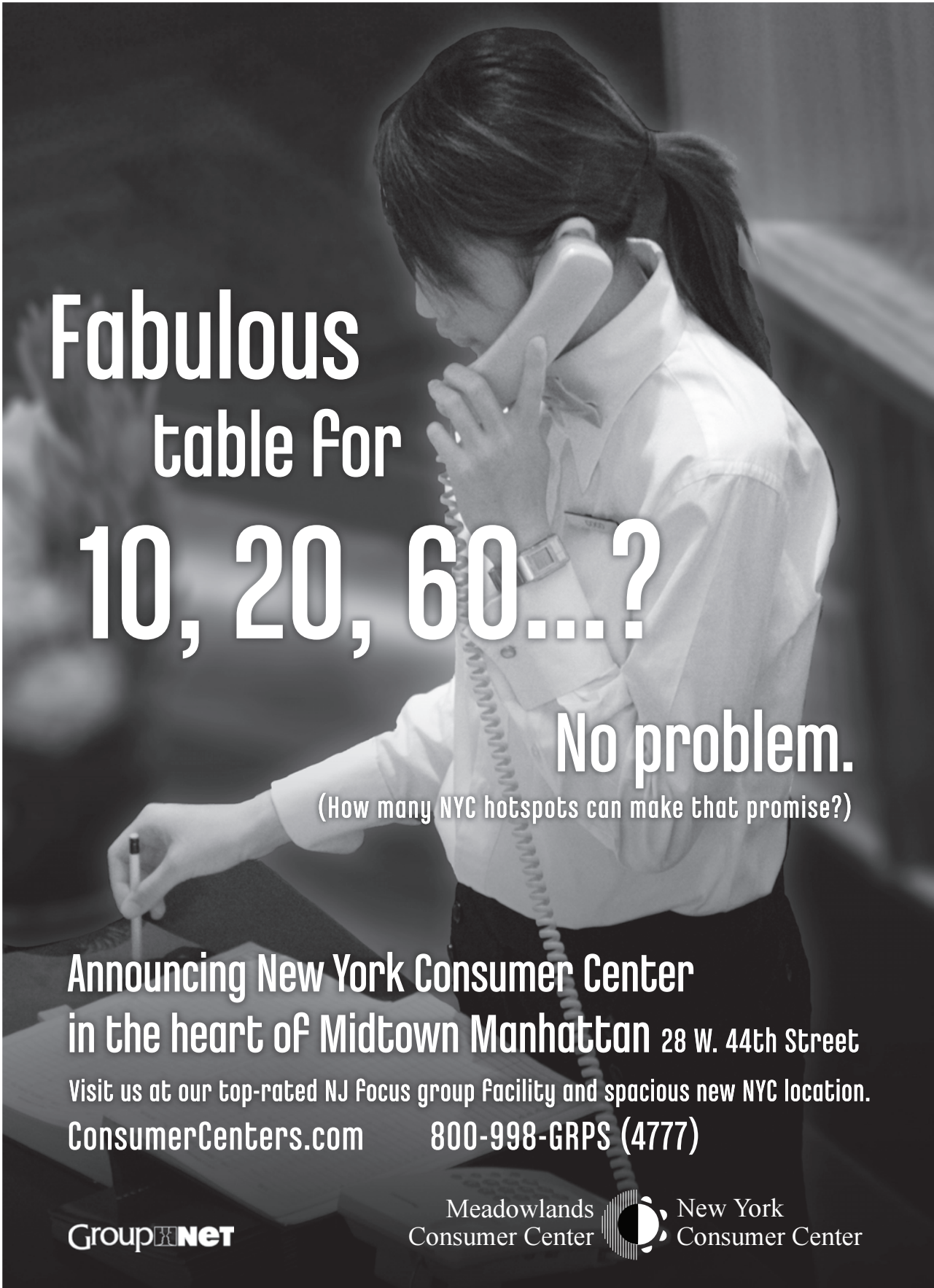
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practices and social causes become a part of the consumer brand experience, as well as the growing popularity in organic products, along with the willingness to pay the 20 percent premium.

4. Back to the future. In response to decades of over-massification, consumers are embracing back-to-the-future simplicity, authenticity and a belief that quality is better than quantity. Consumers are gravitating to smaller-footprint retail environments, including a resurgence of “high street” shopping for one-of-a-kind offerings including “artisanal” and handmade goods. Products with legible labels, simplified ingredients and reassuring packaging are also experiencing success. Nowhere is the back-to-the-future movement more apparent than the explosive growth of consumer brands perceived to be “small and authentic.”

5. The new fear factor. Scandals across religious, government and corporate institutions began the erosion of trust, while the explosion of widespread technology in a post-9/11 world is creating a highly fear-based society, driving consumers to attempt to take ever-greater control of their environment, property, time and safety. Consumers appear to be shutting down as a result of these mounting external factors, with growing concerns about food safety, climate change and a reliance on fossil fuels. This is translating into an increased desire for safer foods and beverages, organic and environmentally-friendly products, and opportunities for manufacturers and retailers to build market share through trust and reassurance.

6. It's reigning men. Men's personal care is the fastest-growing segment in the bath and body care category, driven by “the massification of metrosexuals,” creating permission for a broad target of men to participate fully in the category. Men's personal care products are enjoying explosive expansion across generations. Look for offerings in the year ahead to target the needs of men, including teens and tweens. In addition, more men are gaining exposure to the category as a result of their participation as primary grocery shoppers almost doubling in recent years. Look for them to be increasingly accommodated in the traditionally female environments of grocery, drug and specialty retail.

7. The new consumer-centric media. New media is putting the consumer in greater control in a content-driven world, changing the role of branding from one

of authority to that of a peer. Web sites are increasingly enabling consumers to customize their online experience, creating tight-knit communities of like-minded people driving word-of-mouth about products and services as a result. The Internet is a growing platform for the wellness industry in particular, as consumers confirm the increased influence of the Internet on their healthy and natural purchases. In fact, consumers are currently shopping the Internet in varying frequency for healthy and natural products.

8. Memory fast lane. Consumers have an insatiable demand for knowledge and learning as keys to self-actualization, creating an ever-increasing desire to maintain and optimize brain power. With distractions and 24/7 connectivity intensifying, consumers find their ability to concentrate and retain memory drastically reduced. Consumers across all age groups indicate significant concern about preventing concentration and memory problems. Nearly three-quarters of consumers are currently using supplements, foods or beverages to prevent memory problems. Additional opportunities exist to target the needs of segments from students to gamers to moms to seniors.

9. Working women revisited. After years in the workforce, women – and especially mothers – are revisiting everything from flex time to dinner time as the pendulum swings back to find center. A watershed study linked women's entrance into the workforce in the 1970s with a significant decline in children's diets, including the onset of juvenile diabetes, childhood obesity and other health implications. This is resulting in more Americans committing to eating dinner at home together at least three times a week, to working women looking for healthy convenience in snacking and meals solutions, both at home and away from home.

10. The centenarian century. Seniors living past 100, the fastest-growing demographic group, raise critical concerns regarding society's preparedness and ability to deliver the health care, insurance, social services and fiscal resources required to support the aging. Baby Boomers will be the first wave of older adults to lead a fundamental shift in the demographic structure of the nation, altering the products and services catering to these aging Boomers. Significant changes are ahead in retailing, product offerings and packaging solutions as well as the financial services, long-term health care and retirement options necessary to manage the longevity factor. | Q

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In a faster-paced world, consumers seek simplicity, control

No wonder marketers are driven crazy by those of us in the consuming public. Consider this quote from Maryellen Molyneaux, president of the Natural Marketing Institute, in press materials for NMI's list of top 10 trends for 2007: "Consumer desire for control is the overriding theme across all of our 2007 trends. Consumers express their desire for control across their health, lifestyle, finance and other critical issues, while at the same time they want new innovative products, more information and show increasingly fragmented behavior."

We want control, we want interesting new things and a lot of information, but we can't be bothered to behave in any predictable, rational way.

Sounds like we're a nation of two-year-olds!

NMI, a Harleysville, Pa.-based consulting and research firm, based its annual list on various NMI research sources as well as analysis of current activities in the marketplace. NMI databases, now including 400,000+ U.S. consumers, provide information across more than 150 product categories.

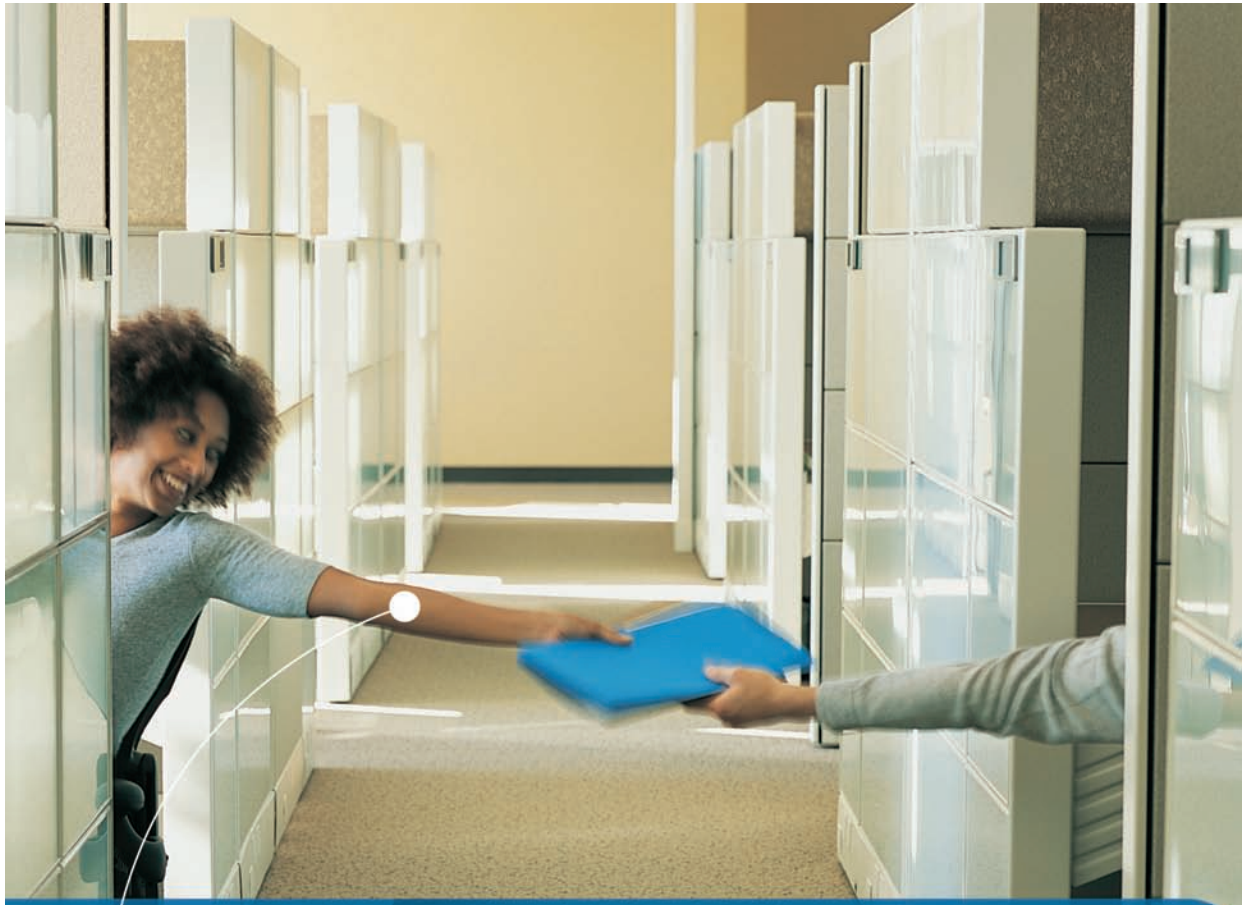
As taken from company press materials, the trends of 2007 are:

1. The age of the individual. The age of the individual is exploding in reaction to mass marketing and a declining trust in the traditional authorities of church, government and the corporation, driving a culture of consumer-generated content, products and services that are "made just for me." Consumer customization spans everything from personalized beverages with programmable bottles, Puma's custom-designed sneakers, to Toyota's successfully customizable Scion. This trend for greater authority and self-discovery is also witnessed in the health decision-making process, with an emergence of "independent attitudes" driving greater polarization of health and wellness at both ends of the spectrum, while increases in condition-specific supplements reflect further expansion in the made-for-me culture.

2. Seize the moment. From the rental of couture handbags and luxury car timeshares to "pop up" retail events, consumers increasingly respond to the temporary in a culture that is less permanent and forever on

the move. For the health and wellness category, this means faster product lifecycles as consumers demand greater innovation and exhibit a greater willingness to try new products regardless of brand. This decline in brand loyalty is witnessed across categories, including the beverage category, as consumers seek the thrill of discovery of new products, new flavors and innovative packaging concepts. In addition, these "forever on the move" consumers will drive new innovation in healthy convenience.

3. A deeper values experience. The retail and brand "new luxury" explosion that made consumers expect an extremely high level of experience at every touchpoint is now evolving beyond the physical and emotional dimensions to the experience of fundamental core values. From luxury hybrid cars to couture dresses made from organic and sustainable fabrics, it is not enough to have it all - we also want to feel better about what we have. This is reflected in the growth of ecotourism (which is outpacing the rest of the travel industry) and cause-marketing programs, which are exploding as sourcing, materials, trade



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