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Marketing Research Review

JANUARY 2008

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> Comparing online and phone research

> The value of blogmining

Packaging research

> Changing packaging? Get research involved early.

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> Enhance the strategic value of your mystery shopping program

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New York	Jul 28-30
Minneapolis	Aug 26-28
San Francisco	Sep 29-Oct 1
Chicago	Nov 4-6
Philadelphia	Dec 8-10

104 | Designing Effective Questionnaires: A Step by Step Workshop $2,095

New York	Jan 15-17
Los Angeles	Feb 26-28
Chicago	Apr 29-May 1
Baltimore	Jul 8-10
San Francisco	Sep 9-11
Cincinnati	Oct 21-23
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106 | Online Research Best Practices & Innovations $1,695

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Cincinnati	Jun 17-20
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Cincinnati	Sep 22-25
Cincinnati	Nov 4-7
Cincinnati	Dec 9-12

203 | Specialized Moderator Skills for Qualitative Research Applications $2,595

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Cincinnati	Aug 11-14
Cincinnati	Nov 10-13

207 | Qualitative Technology Workshop: Recording, Reporting & Delivering $1,695

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301 | Writing & Presenting Actionable Marketing Research Reports $2,095

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501 | Applications of Marketing Research $1,695

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506 | Customer Satisfaction & Loyalty Research: Managing, Measuring, Analyzing & Interpreting $2,095

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601 | Data Analysis for Marketing Research: The Fundamentals $1,695

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Cincinnati	Jun 10-13
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San Francisco	Oct 14-17
Chicago	Dec 9-12

603 | Practical Multivariate Analysis $2,495

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Chicago	Jul 8-11
Baltimore	Sep 16-19
San Francisco	Nov 18-21

605 | Practical Conjoint Analysis & Discrete Choice Modeling $2,095

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New York	Jul 22-24
Los Angeles	Oct 14-16

607 | Forecasting Models for Customer Behavior and Lifetime Value $1,695

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Atlanta	May 19-20
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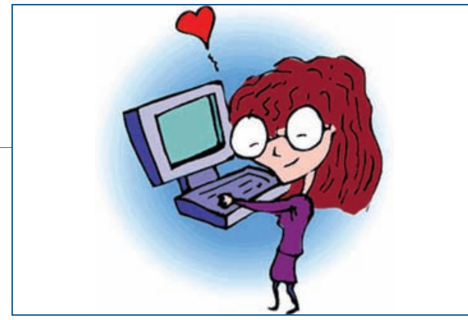
in case you missed it...

news and notes on marketing and research



178 million now online

According to a Harris Poll, the number of adults who are online at home, in the office, at school, a library or other locations continues to grow at a steady rate. In the past year, the number of online users has reached an estimated 178 million, a 10 percent increase. (Based on July 2006 U.S. Census estimate released January 2007 [225,600,000 total U.S. adults aged 18 or over].)

In research among 2,062 U.S. adults surveyed by telephone in July and October, 2007, Harris Interactive, Rochester, N.Y., found that 79 percent of adults are now online. This is a steady rise over the past few years, from 77 percent in February/April 2006, 74 percent in February/April 2005, 66 percent in the spring of 2002, 64 percent in 2001 and 57 percent in the spring of 2000. When Harris Interactive first began to track Internet use in 1995, only 9 percent of adults reported they went online.

The amount of time that people are spending online has also risen. The average number of hours per week that people are spending online is now at 11 hours, up from nine hours last year and eight hours in 2005.

The proportion of adults who are now online at home has risen to 72 percent, up from 70 percent in 2006 and 66 percent in the spring of 2005. The percentage of those online at work has also risen, to 37 percent, up from 35 percent in 2006. The largest increase is among those adults who are online at a location other than their home or work as this has risen from 22 percent in 2006 to 31 percent today. It appears people who do not have access at home or work are increasingly turning to other outlets to get online.

As Internet penetration continues to grow, the demographic profile of Internet users continues to look more like that of the nation as a whole. It is still true that more young than older people, and more affluent than low-income people, are online. However, 9 percent of those online are now age 65 or over (compared to 16 percent of all adults who are 65 or over), 39 percent of those online (compared to 47 percent of all adults) did not attend at least some college and 13 percent have incomes of less than $25,000 (compared to 17 percent of all adults).

I love you, Internet

It won't make you dinner or rub your feet, but nearly one in four Americans say that the Internet can serve as a substitute for a significant other for some period of time, according to a poll released by 463 Communications, a Washington, D.C., consulting firm, and researcher Zogby International, Utica, N.Y.

The Zogby/463 Internet Attitudes poll found that 24 percent of Americans said the Internet could serve as a replacement for a significant other. Not surprisingly, the percentage was highest among singles, of which 31 percent said it could be a substitute.

There was no difference among males and females but there was a split based on political ideology. Thirty-one percent of those who called themselves "progressives" were open-minded to the Internet serving as a surrogate significant other while only 18 percent of those who consider themselves "very conservative" would consider it a substitute.

The poll examined views of what role the Internet plays in people's lives and whether government should play a greater role in regulating it. The online survey was conducted October 4-8, 2007, included 9,743 adult respondents nationwide and carries a margin of error of +/- 1.0 percentage point.

Like the TV in your room? Take it with you!

As Brandweek's Mike Beirne reported, brands like Sony and Restoration Hardware have negotiated deals that will seed their products in high-end hotel rooms, allowing hotel guests to sample products like a Sony PlayStation3 and buy them, and frequently at a discount.

For example, as the Luxor Hotel in Las Vegas proceeds with a $300 million renovation, Restoration Hardware will design and provide furniture. Table tents and messaging on the hotel TV network will alert guests that these products are available at a discount exclusive to Luxor guests. "Quite often we share the same customer [demographics] as the hotel, so we're able to co-market and do things together that are more valuable than just selling product," said Claire Eeles, general manager of Restoration Hardware's trade unit in Corte Madera, Calif.

Sony will be the electronics provider for Borgata Hotel Casino & Spa in Atlantic City, N.J., and the Seminole Hard Rock Hotel & Casino in Tampa and Hollywood, Fla. Guests there can sample Sony's PS3, high-definition TVs and music from the Sony BMG division. Sony Suites are also in the works for top-tier guests and common areas could be converted to showcase products - all of which will be available at a 10-20 percent discounts for hotel guests.

Fulfillment can occur by ordering online, through a catalog using a special promotion code given to guests, or they can bring that code or coupon to a store for purchase. "Borgata becomes an extension of the company we're joining with, and that's why we're excited about it," said Larry Mullin, Borgata's president and COO.

The deals were brokered by Brand Interaction Group (BIG), Summit, N.J. BIG has created a method for brands to build a return-on-investment-based platform in these environments, and is helping brands fuse sales and marketing initiatives under one program. Marketers can also pay for access to the hotel database of frequent guests for direct marketing efforts.

"Product Placement Finds Its Way Into High-End Hotels," Brandweek, November 12, 2007

There are too many of us, pharma reps say

Results from RepReview Pharma 2007 indicate that the number of pharmaceutical sales representatives now competing for prescriber attention is jeopardizing the effectiveness of personal selling - the signature approach of brand promotion for drug manufacturers. In fact, analysts suggest that the inaccessible-physician problem could be customers' way of telling the industry that the current state of this system is not meeting their needs.

RepReview surveyed pharmaceutical and biotechnology sales reps along with sales managers to find out what's really happening on the industry's selling field. Conducted by Indianapolis-based G & S Research in partnership with *Pharmaceutical Representative* magazine, the research shows how salespeople think and feel about their day-to-day responsibilities and the industry they represent; it also explores their challenges, needs and expectations.

In general, the research results verify what many health care professionals have either known or speculated for years: that a strong relationship between a sales rep and physician often coincides with better access to physicians and better market share.

Yet developing a bond with physicians is getting more and more difficult for drug reps due to a myriad of factors. Aside from the saturation of reps in the field, industry regulations, managed care parameters and productivity requirements, and declining public opinion of the industry are impacting the influence of sales reps.

The benefits for those who can earn the trust of physicians and forge a genuine bond are significant. Primarily, there appears to be a correlation between how a physician views a rep and how much time that rep gets. For instance, reps who classify themselves as Trusted Advisors (based on how they think they were perceived by the last physician they called upon) report more time with physicians than those who put themselves in the Sample Supplier category. In fact, more than half of the Sample Suppliers (52 percent) report talking to the physician for less than one minute.

RepReview respondents point a collective finger at "too many competitive representatives taking up physicians' time" as the key culprit of their limited time with physicians. This perception is particularly strong among managers (versus reps) and those targeting primary care physicians (versus specialists).

While the population of reps in the field is cited as the most prevalent obstacle for the pharma/biotech sales force, it's not the only one. RepReview indicates a range of other industry conditions are also taking a toll on reps' effectiveness. Among them are a declining public opinion of the industry (primarily due to negative publicity/media coverage and the cost of medication) and industry regulations, particularly the Pharmaceutical Research and Manufacturers of America (PhRMA) code. As well, stiffer competition from generics, the rising influence of managed care on prescribing decisions, and the "no see" office phenomenon were also identified as key challenges.

Nevertheless, reps indicate they are happy with their job. Roughly half of respondents named their own employer as the health care company they most respect, and about the same number named their own as the best sales force in the industry. Many agree that marketing is providing useful materials and training needs are, for the most part, being met.

Still, there's no question: Salespeople in the pharma/biotech industry need to find new, creative and ethical ways to address prescriber needs and preferences and thereby meet patient needs. For more information visit www.repreview2007.com.

Newspaper Web site readers also read the printed edition

A study released by the Newspaper National Network LP, conducted by New York-based Scarborough Research, found that 81 percent of newspaper Web site users also read the printed newspaper in the last seven days. Crossover users (those who used both print and online newspapers in the past seven days) have deep affinity with both their printed newspaper and their newspaper Web site, and 83 percent say "I love both my printed newspaper and visiting my newspaper's Web site." Crossover users visit their newspaper Web site to: access breaking news (96 percent); find articles seen previously (85 percent); find things to do/places to go (72 percent).

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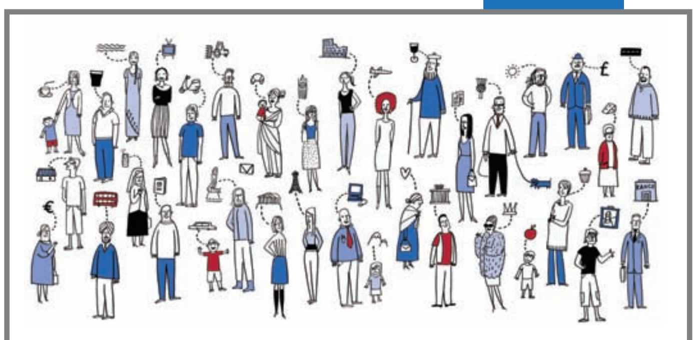

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names of note

Kraft Foods Inc., Northfield, Ill., has named **Mary Beth West** executive vice president and chief marketing officer (CMO). As CMO, she is responsible for consumer insights and strategy.

CBS Radio has named **Lucy Hughes** senior vice president of research.

Resolution Research and Marketing Inc., Denver, has named **Maro LaBlance** project director.

Atlanta marketing research firm *CMI* has named **Pam Maltz** project manager.

Greenfield Online Inc., Wilton, Conn., announced that **Peter Sobiloff**, managing director with Insight Venture Partners, stepped down from the Greenfield Online board of directors after eight years as a member and more than six years as its chairman, effective December 31, 2007. The board appointed **Joel R. Mesznik** chairman of the board of directors to replace Sobiloff.

Mark Duckham has been named managing director of *TNS Healthcare's* UK International division.

Oakland research firm *Bersin and Associates* has named **Linda Galloway** vice president of marketing.

Starcom USA has named **Grant Prentice** senior vice president/ director of connections research and analytics.

San Francisco Internet ratings firm *Quantcast* has named **Damian Reeves** chief technical officer and **Ron Bodkin** chief software architect.

Farmington Hills, Mich., research firm *Morpace Inc.* has promoted **Kirsten Denyes** to vice president.

Denyes Klein

Fort Washington, Pa., research firm *Centris* has named **David Klein** executive vice president, in its new Los Angeles office.

Matthew T. White has joined research firm *Burke Inc.*, Cincinnati, as an account executive in client services.

Bellomy Research Inc., Winston-Salem, N.C., has named **Todd Jordan** account manager and added **Susan Cornish** as a vice president - account director.

Jordan

Jiri Stejskal, president of *Cetra Inc.*, a Philadelphia area language services firm, has been named president of the American Translators Association.

Stamford, Conn., research firm *InsightExpress* has promoted **John Pemberton** to vice president, senior director of research development and consulting. The firm also named **Stephanie Young-Helou** vice president, director of marketing sciences and consulting.

Vancouver research firm *Vision Critical* has named **Jason Smith** president and COO of its panel division.

The Conference Board has named **James H. Slamp** executive vice president and chief financial officer.

GfK Custom Research North America, New York, announced a number of staff changes at its various business units. GfK Brand and Communications has named **Bryce Quayle** senior vice president. GfK Roper Consulting has added **Amy Merrill** as vice president of account development. GfK Customer Loyalty has named **David Albert** vice president and added **Derek Allen** as executive vice president of the GfK Research Center for Excellence. And GfK Custom Research North America has named **Charles McCormick** executive vice president of operations. He will also serve as a member of the firm's executive committee and North American board.

Great Falls, Va., research firm *Rockbridge Associates Inc.* has named **Joseph A. Bates** vice president.

Boston-based *AMR Research* has named **Jonathan Yarmis** as a vice president.

Canadian research firm *Leger Marketing* has named **Marc S. Tremblay** vice president Alberta. He is based in the firm's Calgary office.

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Version 7 of Microtab now available

Atlanta research software firm Microtab Inc. is now offing Version 7 of its Microtab crosstab package. Version 7 has been enhanced to include the following capabilities: import a comma-delimited file of any length; generate 999 row groupings in tables for value fields; print two additional value table stats (optionally); minimum and maximum values for every banner point (sub-cell); control of the density of shading for selected banner points; set the default row label length anywhere from 15 to 30 characters per row under <Tools> (default is set at 19); allow table format changes for saving in Office 2007's new format; and revised median calculations for negative weights and reversed ordering.

With this release, a potential customer has lease options starting at less than $100 per station per month. Before committing to a lease or electing to purchase the software, users can evaluate Version 7 free for 90 days, with free 24/7 technical support included. For more information visit www.microtab.com.

Version 8.0 of WinQuery and QueryWeb now shipping

The Analytical Group Inc., Scottsdale, Ariz., is now offering version 8.0 of its WinQuery and QueryWeb. WinQuery and QueryWeb are packaged together to provide flexible interviewing software for CATI/CAPI and Web interviewing. Questionnaires can be programmed once and then interviewed in all three modes. Highlights of WinQuery 8.0 and QueryWeb 8.0 include: new ranking and side-by-side grouped rating questions; additional interviewer and dialing reports; all-new free-format programming interface; and enhanced Web study reporting.

WinQuery's ranking question provides a visual click-and-rank display. The side-by-side grouped rating question groups rating questions for sequential display and rating ease. Additional user-defined reporting calculations and reports are included to provide more details about interviewers and respondents. QueryWeb Designer's new free-format programming interface features full customization of questions and answers. Enhanced QueryWeb study reporting provides real-time results presented in a new graphical format. For more information visit www.analyticalgroup.com.

Analytical tool plumbs emotional depths

Minneapolis research firm the Dcypher Group has unveiled an analytical tool designed to measure and assess the emotional reaction of individuals or groups to products, events, concepts, ads, service experiences or political messages through an analysis of the written or spoken word.

Using the dictionary of affect in language, developed by Cynthia Whissell, the Dcypher tool presents distinct numeric and graphical maps of emotional reaction based on an analysis of the words people use to express themselves. The tool can measure individual or group responses and compare the emotional reactions of different individuals or groups. Emotional dimensions measured by Dcypher include pleasantness, excitement, imagery, happiness, anger, joy and sadness. Finally, Dcypher is designed to work whether it is evaluating text in the form of survey comments, traditional or online focus groups, one-on-one interviews, e-mail or blogs. For more information visit www.dcyphergroup.com.

Ipsos debuts veterinarian panel

Research firm Ipsos has developed a new proprietary online panel consisting of veterinarians in North America. Currently, over 900 veterinarians from the U.S. and Canada have joined the Veterinary Advisory Panel with plans to grow it to over 2,000 in the coming year. Panelists are pre-screened to ensure that the panel consists of licensed veterinarians only and is specifically focused on those in general companion animal practices, with a patient base of at least 75 percent dogs and cats.

Designed to be representative of the general population of small-animal practitioners, the panel was developed using a variety of approaches, including e-mail, fax, mail and online advertising. For more information visit www.ipsosna.com.

Vovici releases survey creation product

Dulles, Va., research firm Vovici has released its Vovici SurveyNOW product, designed to help customers build, deploy and analyze surveys by selecting from over 175 pre-defined surveys through a simple wizard-driven online interface.

Vovici SurveyNOW customers can create and deploy a survey and immediately use the dashboard to view and analyze results. Survey templates span subject categories such as customer satisfaction, employee satisfaction, brand image, Web site effectiveness and market segmentation. Surveys are further tailored by vertical industries and specific market segments. The dashboard also allows users to track survey progress, activate and deactivate surveys and report on the results.

The five-step process for building a survey begins with the user selecting a pre-defined survey template aligned with a business need and market segment. The user then personalizes the selected survey by entering values for replaceable fields

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research industry news

News notes

Farmington Hills, Mich., research firm **MORPACE International Inc.** has changed its name to **Morpace Inc.** The company ownership and corporate structure have not changed. All existing contracts remain in effect.

Acquisitions/transactions

Synovate has acquired **Research Solutions**, an Auckland, New Zealand research agency with a staff of 45 full-time employees and 200 interviewers.

Alliances/strategic partnerships

New York researcher **TNS** has entered into a strategic alliance with **Intellidyn**, a Hingham, Mass., database marketing and analytic services company focused in the financial services sector. Through the alliance, TNS intends to create a new global practice entitled TNS Customer Intelligence Consulting.

Association/organization news

Dallas-based **Common Knowledge Research Services** announced its participation in the **Your Opinion Counts** program, a community of researchers who have pledged to uphold marketing research industry standards and the program's Respondent Bill of Rights. The program, maintained by the Council for Marketing and Opinion Research, was designed to encourage the public's participation in research and to help the public differentiate legitimate research organizations from those who are selling or engaging in unethical activity under the guise of research. Common Knowledge is the first online panel company to join.

Awards/rankings

Edison, N.J., research firm **Schlesinger Associates** has won the Celebrated Company Award from the Marketing Research Association. The award is given to the firm that has provided "outstanding volunteer efforts and has shown outstanding support at the national and chapter level for at least five years."

Managing the Customer Experience, A Measurement-Based Approach, written

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Calendar of Events February-May

Frost & Sullivan will hold its Marketing Research 2008 Executive MindXchange event, themed "Customer and Market-Facing Marketing Research for Profitable Growth," on February 4-7 at the Hilton Clearwater Beach Resort in Clearwater Beach, Fla. For more information visit www.frost.com/mrt.

ESOMAR will hold a conference on health care research on February 4-6 in Rome. For more information visit www.esomar.org.

CASRO will hold a conference on panel research on February 5-6 at the J.W. Marriott Hotel in Miami. For more information visit www.casro.org.

IIR will hold a conference on linkage strategies on February 24-27 at the Doral Golf Resort and Spa, Miami. For more information visit www.iirusa.com.

The American Marketing Association will hold the training seminar "Conjoint Analysis and Discrete Choice Modeling: Introduction, Comparison and Evolution" on February 27-28 at the Gleacher Center in Chicago. For more information visit www.marketingpower.org.

IIR will hold a conference on youth marketing on March 2-5 at the Marriott Newport Beach Resort and Spa, Newport Beach, Calif. For more information visit www.iirusa.com.

ESOMAR will hold a conference on automotive research on March 3-5 in Switzerland. For more information visit www.esomar.org.

The Northern California Pacific Northwest, Southern California and Southwest Chapters of the Marketing Research Association will hold their annual Las Vegas conference on March 5-7. For more information visit www.mra-net.org.

The Pharmaceutical Marketing Research Group will hold its annual conference on March 9-11 at the Marriott Desert Ridge in Phoenix, Ariz. For more information visit www.pmrg.org.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on March 31-April 2 at the New York Marriott Marquis. For more information visit www.thearf.org.

ESOMAR will hold its Asia-Pacific conference on April 7-9 in Singapore. For more information visit www.esomar.org.

The Qualitative Research Consultants Association and the Association for Qualitative Research will hold a worldwide conference on qualitative research on May 7-9 in Barcelona, Spain. For more information visit www.aqr.org.uk or www.qrca.org.

ESOMAR will hold its annual Latin American conference on May 11-14 in Mexico. For more information visit www.esomar.org.

The American Association for Public Opinion Research will hold its annual conference on May 15-18 in New Orleans. For more information visit www.aapor.org.

The U.K.-based Business Intelligence Group will hold its annual conference, which focuses on business-to-business marketing and research, on May 21-23 at the Marriott St. Pierre Hotel in Chepstow, England. For more information visit www.bigconference.org.

Canada's Marketing Research and Intelligence Association will hold its annual conference on May 25-28 in Winnipeg. For more information visit www.mria-arim.ca.

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. For a more complete list of upcoming events, visit www.quirks.com/events.

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The Fine Art of Marketing Research

By Stefan Althoff

Using the PRD technique online

In July 2006 I made a presentation at the 13th PUMa conference (Plenum of Business Market Researchers; produced by the German market research journal *planung & analyse*) in Frankfurt. The presentation was related to international market research and the discussion afterward revolved around the topic of scaling and the analytical challenges that can result. This was the starting point for the revival of an old idea.

I was planning an employee survey that had some difficult challenges, so I contacted Udo Dumke, a senior consultant at topcom, a consulting agency in Hamburg, Germany, with whom I had already corresponded some 10 years earlier about a very old method: magnitude estimation scaling (MES). We had long discussed how this technique could help with certain difficult question response conditions, and I thought that this might be the right time to try it out.

The survey was about possible improvements to the intranet site of the Lufthansa Technik (LHT) marketing and sales department. To evaluate an intranet site seemed an ideal application for MES.

Topcom had already many experiences with concept evaluation and the use of MES analysis in similar offline studies. The company offers a tabulating program with which MES studies can be evaluated.

I had some previous experiences in the design and programming of online studies. Lufthansa holds a company license for the German software Globalpark, a do-it-yourself package for producing our own internal and external surveys. Our experience has been that online surveys are very suitable for employee surveys. And more importantly, the LHT employees find online surveys to be familiar and acceptable.

So, after a few conversations, we thought, why not perform an online MES employee survey together, and see if we can get better results? In August 2006 the first work on the joint project began.

Editor's note: Stefan Althoff is marketing research manager at Lufthansa Technik, Hamburg, Germany, a subsidiary of Lufthansa German Airlines. He can be reached at 49-40-5070-2905 or at stefan.althoff@lht.dlh.de. The author would like to thank the following colleagues for their input, thoughts, suggestions and cooperation: Udo Dumke, senior consultant at topcom, Hamburg; Bill MacElroy, president of Socratic Technologies, San Francisco; and Jeffrey Kerr, senior vice president of Socratic Technologies, Chicago.

Understand context

Even if MES is not the exact topic of this article it is necessary to explain this method to understand the context of the whole project and where we netted out.

MES goes back to the research work on auditory perception by American psychologist S.S. Stevens. Stevens stated that physical sensations are felt subjectively. For example: A doubling of loudness does not mean that this sound is perceived as being twice as loud. For

the measurement of the individual's perception of loudness Stevens' respondents worked with levers (similar the brake grasps of bicycles). The louder the sound, the tighter the respondent would squeeze. With this variable measurement device, Stevens could solve the problems of rating scales being used differently for the same stimulus.

Stevens used the MES method for other physical sensations as well (e.g., for the taste perception of salt) and also applied his results to market research problems. But the procedure never received large attention because of its complexity in execution.

Without going into too much detail, his research application of MES is a sociological convention to transform classical five- or seven-point interval scales into relative estimation measurements. This is desirable because otherwise it would be not be possible to calculate the means and other ways of comparing results.

Topcom found out that by using MES it is possible to evaluate slight differences between different products or concepts - which is exactly the problem we were facing with the intranet evaluation. It uses a simplified version of MES, which is applied like this:

1. An initial ad or concept is presented to the survey participant for consideration.

2. Next the respondent has to evaluate the concept or ad on a series of attributes, but instead of using a five- or seven-point scale the participant provides ratings using a value along their own individualized scale (a whole number value greater than zero, open-ended).

3. Then the participant has to rate whether he or she likes the ad or concept with regard to the attribute being discussed (likes/dislikes).

4. After this, the next concept is presented, and the respondent evaluates it in the same way.

This technique allows the respondent - if the individual's scale choice is not too restrictive - to adjust his or her ratings upwards and downwards with a very fine level of precision. After all the evaluations are collected the data analysis for all items involves constructing the arithmetical mean for each individual scale and the likes and dislikes in percent.

MES works best if you start each individual with a benchmark exercise. An evaluation of the LHT intranet homepage (not the key area for the evaluation) was selected for this task.

So far as our project team knew, MES had never been integrated into an online survey in Germany before. Because this was an important project for management, and because we weren't completely confident that the technique would yield the results we were looking for, we decided to run a split-sample test, with half of the survey sample taking the survey in a traditional way, using a seven-point scale, and the other half using MES.

Interesting artifact

By starting with the LHT homepage as a benchmark within our MES test design, we discovered an interesting artifact of the MES technique. It turns out that it is necessary for the respondent to see the ratings that they gave each previous concept evaluation. Only then do we find that maximum differentiation between subtle differences is achieved, resulting in a more precise evaluation. It also helps to maintain a control between stimuli by creating a constant basis for comparison between items, one of which has already been evaluated.

Again, as far as the project team knew, this too had not been used in online surveys, although the power of the Web makes such applications easy. We felt that customer expectations and the degree to which expectations were being fulfilled (common elements in most customer satisfaction studies) would also be measurable using this technique.

So as a part of the MES experiment, we looked at this new, exciting innovation and dubbed it previous rating displayed (PRD). The team formulated the following hypotheses regarding its use:

• PRD would increase the comfort of respondents taking online surveys;

• using PRD, the scattering of the ratings should be lower.

The previous rating for this study was displayed below the items for the current evaluated intranet site aspect.

We eventually wound up creating three survey groups, largely due to the fact that after a pre-test with LHT trainees we had the feeling that the acceptance of the MES method (the free-form ratings) could be in trouble. So rather than put too many eggs in the MES basket, we decided to cover our bets and create a third group that we could use to isolate the effects for PRD. The splits were as follows:

• 40 percent magnitude estimation scaling with PRD built in (MES group).

• 30 percent for a group with a seven-point rating scale, with PRD in addition (PRD group).

• Finally, one group – 30 percent – with a seven-point rating scale without PRD, our so-called classical group.

This survey finally became the biggest online survey every conducted internally at LHT, with more than 4,600 invited employees.

More compelling

While the results from the tested intranet pages using MES in an online survey were interesting, the PRD results were even more compelling.

In order to judge our hypotheses, the participants were asked about their perceptions of the PRD technique:

• 56 percent of all participants within the PRD split mentioned that the display of the previous rating was helpful.

• 32 percent of all participants of the non-PRD split mentioned that the display of the previous rating would have been helpful.

• Within both splits only a few participants went back to the previous page to correct the ratings.

So our first hypothesis was confirmed: PRD increases the comfort with an online survey. But what about the scattering of the data?

After several statistical tests – 62 F-tests on variances for independent samples – the team found that the PRD technique had only slight improvement in the consistency of the ratings:

• Seven instances were significantly different in the PRD group at the 95-percent confidence level.

• Three instances were significantly different in the classical group at the same level.

This was in October 2006. Even if the results were clear, I was still concerned that this one-off experiment might have had results that were merely coincidental. Dumke and I had some discussions about the findings. Even after several checks we were not sure that we didn't made any analysis mistakes.

Research-on-research

In November 2006, I talked about PRD with Bill MacElroy of Socratic Technologies in San Francisco at the IIR European Research Event in London. MacElroy was interested in our findings, and he promised to continue the research-on-research work when he could find a suitable survey.

In February 2007 Jeffrey Kerr, senior vice president of Socratic Technologies in Chicago, integrated a methodical test of PRD within an online beverage survey (see Figures 1 and 2 for screen shots).

For this concept test we used the online panel of Socratic Technologies in the U.S. and completed 362 surveys with people who had been screened by beverage usage.

• Concept evaluation with PRD: 181 test persons (= 50 percent).

• Concept evaluation without PRD: 181 test persons (= 50 percent).

The participants had to evaluate three different beverage concepts. As before, when the PRD group was evaluating the second concept, the ratings of the first concept were presented. But there were two important differences:

Figure 1

• Within the LHT online survey the participants evaluated the intranet site aspect by aspect, whereas in the Socratic survey the panelists did concept-by-concept ratings. Within the latter design the usage of PRD is much more obvious to the respondent.

• The Socratic programming was much more sophisticated: The participants had the chance to correct the ratings by clicking onto the ratings via a pop-up. If a participant used this feature, the corrected rating was displayed after closing the pop-up.

Also within this survey, the participants were asked if the display of the previous rating was helpful. The results are very similar to those in the German survey.

• 53 percent of all participants within the PRD split mentioned that the display of the previous

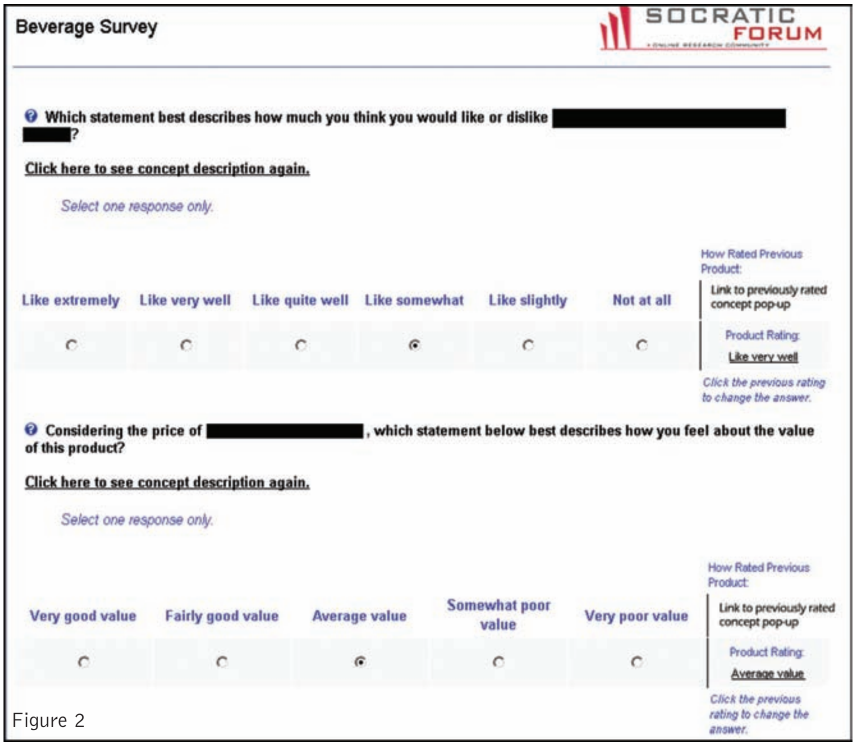

Figure 2

rating was helpful.

• 33 percent of all participants of the non-PRD split mentioned that the display of the previous rating would have been helpful.

• Only a few participants corrected their ratings.

After data analysis, Kerr stated that PRD does not result in findings which are significantly different from the classic method, but the degree to which it made comparisons of stimuli with very similar characteristics possible was a definite plus. We are continuing to study the subsamples for further differences and to see if certain groups respond to the technique better than others.

Increases comfort

We could prove that the PRD technique increases the comfort with online surveys when small differences between stimuli are involved: For more than half of all participants in both surveys the display of the previous rating was helpful.

It produces the same general results: the PRD technique does not influence the relative concept ratings themselves, given that the findings with PRD are equivalent to those without PRD.

But it is also slightly more difficult to execute: the PRD technique requires more programming effort.

So, our overall conclusions are that PRD is a relatively easy technique. With respect to the general tendency of decreasing participation in online surveys this technique could be one method to boost cooperation levels – particularly if the rating tasks are complex or difficult.

But there are still some open questions:

• How does the PRD technique works with longer item lists?

• Is it possible to use PRD in combination with a sophisticated random rotation algorithm for the item lists?

The last point is important. In both surveys it was not possible to rotate the attributes. This was a result of some restrictions due to the hierarchy of choice. If the items on the previous page and the comparison page rotated in different ways, it would be very confusing for the respondents. This means that further basic research about PRD variations is necessary.

But my overall conclusion is straightforward: it works! | Q

By Randy Brooks

Internet data quality

Last year I turned 60, celebrated my 33rd year in the marketing research profession and my 20th year as head of Directions Research. I think that entitles me to offer an opinion about Internet data quality issues that the research community has been hotly debating. My opinion will, in the tradition of our profession, be liberally supported with data, but I forewarn you that what I am about to say will be counter in many ways to the mainstream and much of the debate we have been having for the last couple of years.

But first, a story. In 1976 Burke Marketing Research sent me to London, where I was charged with establishing a centralized telephone interviewing facility, the first of its kind in London and perhaps the first of its kind in Western Europe. I rented space in the World Trade Center that overlooked the Tower of London, hired and trained a staff and set out to persuade the British research community that this method of data collection had merit. At that time in the U.K. virtually all data was collected using door-to-door interviewing. Despite the manifold weaknesses of this method (the virtual absence of upper- or lower-income respondents; problematic coverage of rural areas; impossible to conduct interviews in large apartment complexes; few if any minorities in the sample, etc.), the data derived via this method was regarded as the Revealed Truth.

The apparent weaknesses of telephone interviewing were magnified and examined in great detail. It was fascinating to see objective professionals label telephone penetration rates of 75 percent as "inadequate" while ignoring the obvious bias and control issues that characterized door-to-door data collection. The reason for their actions, I believe, was simple: door-to-door interviewing had been used since the beginning of time in the U.K. and it worked!

The data were sensitive to in-market events. The data were predictive of consumer reactions to product, advertising campaign and pricing initiatives. Because the method had always "worked" the details of its shortcomings were ignored. Telephone interviewing had yet to provably work and thus was suspect. Every apparent flaw was speculated about and used to dismiss it. Only when some brave souls tried it and found it worked (generally better than door-to-door) did it gain acceptance.

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For the last several months the industry has worried about a handful of reports of flawed Internet studies that didn't work. We fret endlessly about respondents who are "gaming" the system to earn money. We self-flagellate about poor quality. And yet Internet data collection is now the largest single method in use in the United States. Our clients at Directions and apparently thousands of clients saw fit in 2006 to allocate over $1 billion of corporate funds to purchase data gathered on the Internet.

Why? Well it must be "working" –

we are collectively too smart and risk-averse to wager our careers and reputations on a method that is hopelessly flawed.

Let's take a look at a sampling of the data we have at Directions on how online research is "working":

• We run an Internet-based concept testing system for a very large client. Prior to standardizing with us, the client selected 70 concepts it had tested in the past using other suppliers/methods and retested those concepts in our new system. The correlation between old and new scores was better than 85 percent! Test-retest reliability is a cornerstone of confidence in any system and we witnessed it.

• We do tracking work for many clients. When advertising spending goes up, key measures rise; turn off the advertising and measures trend down. The numbers hang together and tell logical stories. The data seem valid compared to in-market events.

• We use mixed methods for some tracking work because the Internet does not adequately cover minorities. The correlation in key measures between phone and Internet is extremely high.

• Massive segmentation studies (n = 10,000, for example) in the restaurant industry profile occasion-based segments with sensible competitive sets and believable shares, advantages and conclusions.

• Brand shares calculated from claimed usage on Internet studies invariably match up very well with syndicated data.

Day in and day out the data we gather on the Internet is subjected to the duck test. It quacks, waddles and has webbed feet. Internet data collection is a powerful and useful tool that has enhanced the ability of marketing researchers everywhere to aid management in making decisions. My conclusions are drawn from work we do with an array of Internet data collection firms who utilize a variety of alternative sampling methods and incentive plans. They all work.

Learned and adapted

Like our colleagues and competitors, we have learned and adapted our protocols as the Internet has sped from introduction to dominance.

• We use finely-tuned age and sex quotas to insure that each sample is representative of the population to which we are required to project our results.

• We avoid the temptation to use the less costly Internet platform if the respondents being sought are elderly, minorities or very-low-income respondents. We blend methods when these respondents are needed.

• We've learned to identify speeders and eliminate them from the ending sample.

• We've built logic traps to clean out the cheaters.

• We've worked with our suppliers to clean the chronic cheats from their samples.

• We watch the data we get here carefully because our very existence depends on it.

• We use Internet data collection only when it is the best solution. Phone, mall, in-store, interactive voice response, mail and other methods are still viable and in many cases provide a better solution than Internet.

Few cheats

You want a positive ending to this story? Here it is: very few people are cheats. Just ask the IRS, which relies on mass honesty in tax reporting. There were 1,283,950 individual returns examined in 2006. Of those, 3,907 investigations were made by the criminal investigation program, for legal source tax crimes (1,524 for cheating) or illegal source tax crimes (2,383 illegal activities).

Only about .3 percent of audited returns are fraudulent, but of those .11 percent are really related to cheating.

Very few interviews we obtain from reputable Internet data collection firms are tossed out, and it should be noted that we are never completely sure these respondents are flawed – it just seems likely that they might be.

Remember also the interaction we have with respondents in an Internet study is a one-on-one relationship. Individuals agree to a self-completion study. If a cheater shows up only his/her data is flawed. Phone studies and mall intercepts create opportunities for individual interviewers or firms to damage a very high percentage of the data. My most embarrassing professional experiences have been the result of inept or fraudulent work by those rare individuals or firms who cut corners to make deadline.

Trust but verify

Ronald Reagan used this phrase "trust but verify" and I think that principle applies in this debate. Trust that professional organizations have nothing to gain in the long run by offering up flawed data but certainly verify and adapt processes to insure the data are accurate and the conclusions we are drawing can be used with confidence by decision makers. | Q

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By Michael Hesser

Each has its strengths and weaknesses

A comparison of phone and online research

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One of the most important issues for researchers when developing a study is the selection of an appropriate data collection technique. Key questions faced by researchers at this point in the project lifecycle include:

• What is the most direct and cost effective means of reaching the targeted sample segment?

• What methodology will yield the most representative and projectable sample for the research project?

One of the historic strengths of telephone surveys has been the ability to be representative and projectable to the greater U.S. population. With more than 90 percent of households having a landline telephone, these surveys have provided researchers with a direct and socially acceptable means of contacting and recruiting survey participants. In recent years, however, several trends have emerged that have diminished the advantages of telephone surveys and compelled researchers to seek out new alternatives for data collection. These include:

• declining participation rates for telephone surveys, which result in higher costs;

• a growing dependence on wireless telephones (some estimates put cellular-only households at more than 10 percent of the U.S. population); and

• a decreased receptiveness to unsolicited contacts at home (e.g., the growth of the Do Not Call list).

Growing concerns with the reliability and validity of telephone survey research have coincided with the rampant growth of online or Internet research. Online surveys typically utilize groups of previously-recruited consumers - or panels - as a means of creating an accessible sample for fielding the surveys. Given the nature of the medium, online surveys can offer certain advantages over more traditional approaches, including cost-effectiveness, time-in-field and questionnaire format and complexity. At the same time, the publicly-held view of Internet research as cheaper and faster brings with it a unique set of challenges that must be taken into consideration, such as:

• How appropriate is an online survey given the characteristics of our target segment? For example, do they have access to the Internet to an extent that will support survey research?

• What is the nature of the available Internet survey panels, in terms of geographic coverage and demographic characteristics?

• How is the Internet panel managed in terms of recruitment, turnover, incentives and limits on ongoing participation over time?

Projectable to the universe

A key consideration of any primary research study has to do with the degree to which the results of the sample survey are projectable to the population of constituents that sample is designed to represent. Toward this end, a truly random - and therefore projectable - sample must meet two key criteria:

• all universe population members must have an equal chance of being contacted for the survey; and

• all universe population members must have a known chance of being contacted for the survey.

Certainly, any primary research project likely falls somewhere short of the ideal relative to these definitions. Still, the respective strengths and weaknesses of telephone versus online research must be taken into account when selecting the appropriate methodology for any given study.

One of the greatest concerns with online research is whether it is truly representative of the U.S. population and can be administered in a truly random fashion. In the instance of Internet panels, online studies are reflective only of the panel members and not necessarily of the entire population of online consumers in the U.S.

A study by MRWeb.com (March 2007) reported that 30 percent of consumers in the U.S. are not online and of those, 44 percent are not interested in anything on the Internet. This calls into question the ability of Internet research to be projectable to the U.S. population, when 30 percent

of that population is not reachable via the medium.

Caution must be exercised when considering the validity of Internet panels that claim high levels of representation simply because 70 percent of the U.S. population has access to the Internet. With panel sizes typically ranging from three million to five million members, panel samples are representative only of the panels from which they are selected.

That is not to say that online research is not valid; rather, caution must be taken when conducting online studies. If the sample is to be representative of the U.S. population, then measures need to be taken to reflect the offline population such as weighting on the back end or balancing the sample before fieldwork.

Additionally, to be truly random as stated above, each panel member must have an equal and known chance of participating in any given study. This requires the careful eye of the online sample management team.

The amount of time spent in data collection is inversely related to the reliability of a sample. Projects that complete thousands of interviews in a single weekend suffer from greater non-response bias than any telephone research survey.

As a means of managing these issues, an online study must be left open long enough to include those who are not online as often the chance to receive the invitation and participate in the study. "Professional respondents" also need to be carefully controlled as people become adept at knowing how to qualify for studies and once in the survey they may fabricate answers.

Again, managing the online sample to ensure panel members are invited randomly is important, as is controlling the number of surveys panel members can participate in during a certain period of time.

Fit the objectives

Like all research studies, the approach and methodology taken must fit the objectives of the research. Neither telephone surveys nor online surveys are appropriate for all research projects; therefore, it is important for researchers to consider the strengths and weaknesses of each approach and choose the method that best suits the study objectives.

<u>Telephone</u>

Until recently, telephone surveys have been the most prevalent means in which to collect consumer data in the U.S. Telephone surveys surpassed the earlier methods of time-consuming mail surveys or costly face-to-face surveys by providing faster and more effective data collection without sacrificing validity.

Several key advantages remain for conducting telephone surveys, including:

• Random-digit dialing techniques ensure a randomly chosen sample.

• The sample can be representative of the U.S. population, with 90 percent of households having a home phone.

Table 1: A Comparison of Phone vs. Online

	Phone	Online
Sample Management	Sample is purchased at approximately 15 times the total number of desired completes. Replicates are created, and each number is called a minimum of six times before considered unusable.	Panel is targeted at level deemed necessary to achieve necessary number of completes. Ideally, a "slow start" is utilized to test incidence and QRE length.
CPI (cost per interview)	20% higher than online costs.	20% lower than phone costs.
Sample Sources	Random-digit dialing of population with home phones (access to over 90% of total population).	Online panel members recruited via e-mail, Web sites, pop-ups, etc. Consists of Internet panel members who agree to participate in ongoing research projects. Typical panel sizes range from 3 to 5 million. Represent less than 2 percent of total U.S. population.
Timing	7 to 10 days	3 to 4 days
Response Rate	Average of 20-30% among respondents contacted.	Average of 5-10% among respondents invited to the survey.
Geographic Distribution	Nationwide, including the ability to target specific states, cities, zip codes and so on.	Nationwide and state-specific. Some ability to target at the market level. (Some areas are underrepresented due to lower levels of panel sample availability.)

• Interviewing difficult-to-reach respondents. Telephone interviews can be more productive and yield a better response rate.

• Capturing open-ended responses. A live interviewer can thoroughly probe the respondent and gain a better understanding behind why the respondent answered the way they did.

There are, however, several factors that have risen in recent years that impact telephone interviewing, including:

• The creation of the do-not-call list. Although this does not directly affect market research firms, it does indicate the direction in which consumers are moving to restrict unsolicited calls.

• More consumers are compelled to have an unlisted number or cell-only number, which further restricts undesired calls.

• Costs can be high when specific populations are targeted or the incidence is low - like finding a needle in a haystack.

• Time-in-field can also be longer, in that fieldwork cannot be conducted as quickly when the rules of randomness are applied (such as a minimum number of callbacks made to reach each respondent).

Online

Online research has been used in the U.S. for more than 10 years, with continuous progress made in terms of both sample availability and survey technology.

Some advantages to online research include the following:

• More sophisticated questionnaires. 3-D images or videos can be shown online that are realistic and complex rotations can be programmed for difficult-to-administer tasks such as choice modeling exercises.

• Speed. Data collection can be shortened as thousands of e-mail invitations can be delivered at one time.

• Costs. Costs can be less than telephone interviews especially if the targeted samples are of general online users rather than the general consumer population.

• Reduction of incidence. Because many panels include specific demographic and behavioral characteristics of their members, the concept of random incidence is avoided based on the ability to target specific panel members who are known to possess the required characteristics.

Again, there are also disadvantages to using online surveys including:

• Truly random and representative samples are difficult to achieve, as noted previously.

• Speed of data collection is inversely related to the quality of the data - again, as noted previously. If sample management teams are allowed to send out as many e-mail invitations as desired to fill the quotas, this also allows only those online at that time to complete the survey. Slow starts need to be employed to ensure some randomness.

• Costs can also be more than traditional telephone interviews if the incidence of the targeted population is low. For some groups, there is little chance the targeted population has e-mail addresses, thus requiring a hybrid approach such as a combined telephone recruit to a Web survey. In other instances, a significant incentive is required to encourage specialized populations to participate (such as physicians).

A point of comparison was made using a hypothetical study that could be conducted using either an online panel or by random-digit dialing on the telephone. The study was outlined as being a general-population study of respondents aged 18-64 years of age, with a mix of gender and a qualified incidence rate of 85 percent. The questionnaire was assumed to be 15 minutes in length, with a targeted sample size of 500 respondents.

The two different methodologies produced the comparison points as shown in Table 1.

Diligent consideration

In summary, any primary research project will benefit from diligent consideration of the advantages and disadvantages associated with various alternative data collection methodologies. While the rampant growth of Internet research continues to offer marketers new and different options, the disadvantages of Internet research from the standpoint of validity and reliability must be considered in relation to the potential and relative cost and timing benefits. | Q

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Focus Pointe Bala Cynwyd
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What are they saying about us?

By Hugh Davis
and Mike Oberholtzer

Market research has almost always been structured one way: a client wants to know how consumers have acted in the past, where their "heads are at" in the present, or how they're likely to react in the future. Typically, clients hire market researchers to execute a market research project that consists of posing critical questions to be answered by target audiences. This tried-and-true methodology has existed since the 1950s and provides not only answers to marketers' questions but has helped them determine market opportunities, understand the competitive landscape, innovate new products and refine packaging.

In a perfect world, market researchers would always be able to engage consumers one-on-one on the phone, online or at the mall to get the information their clients need. But, more and more, busy consumers are making it clear they will only respond to requests for this information on their own terms, and at a time that is convenient for them.

What if market researchers could be more become even more proactive? What if it were possible to leverage a vast repository of information that contained the answers to questions about consumers' opinions, as well as answers to questions that researchers hadn't even thought to ask yet? What if researchers could tap into this resource in order to extract answers about consumers' connections to their clients' products in the past, present and future? This type of intelligence could be used proactively by market researchers and marketers alike.

Blog mining - another tool for the research professional

Have the upper hand

The digital revolution that is occurring today is a confluence of revolutions in media, consumer behavior and marketing. Consumers have always aspired to have the upper hand in the marketer-consumer relationship. What's new is that consumers have now acquired immense powers to take that control. The Web enables consumers to express their innate yearning for control and natural inclination to be proactive. Consumers can now explore, play, connect, transact and, importantly, be heard (whether they are brand advocates or detractors).

People use the Web as a sounding board to express their opinions about everything from technology to travel to tiramisu. Around the world, more than 1 billion people - about one-sixth of the global population - use the Internet. And, increasingly, Internet users are becoming bloggers.

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Because of the unrivaled anonymity afforded by the Internet, as compared with other communications mediums, users feel comfortable expressing themselves honestly and openly. The Internet has always been a means of self-expression and blogging has evolved as a result.

In addition, blogging has become a creative alternative to the traditional means of sharing or publishing information, and many blog sites are becoming recognized as a legitimate supplement to commercial media, or a place to gain knowledge about people, places, ideas and, of course, brands.

This is not a new phenomenon, however, and advances in digital technologies - like blog mining - are making it easier for market researchers and marketers to tap into this huge resource of consumer data. As consumers take advantage of the Web to help shape their relationships with brands and take active control of defining their brand experiences, marketers can view the analysis of what they are saying as another valid resource of consumer opinion.

Phenomenon has spread

Bloggers are no longer a select group; the phenomenon has spread across the general population. This move to the blogosphere, a concept that means all blogs are somehow interconnected as a community or social network in cyberspace, is only natural because the Internet is populated by people who strive to speak out and be heard. The Internet is a virtual sounding board, and everyone is an author. From Facebook to MySpace to YouTube, people are leveraging social networking Web sites and others to make their presence and preferences known.

When someone begins writing a blog, their circle of influence increases exponentially as their readership grows, and ultimately in some cases, even among the news media. Marketers need to be aware of the important pieces of consumer feedback discernable from the bloggers' postings. In addition, marketers should take notice of the bloggers' distribution, reach and readership.

The viral spread of blogs and bloggers has created a huge reservoir of information of which researchers should take notice. Just look at these figures:

• Globally, there are now at least 70 million blogs in existence. Sixty-three million blogs have been created on eight leading blog hosting sites that host one million or more blogs alone.

• More than 12 million American adults currently maintain blogs. Six percent of the entire U.S. population has created blogs.

And the blogosphere is home to a vast population of blog readers as well, expanding a bloggers' sphere of influence to an almost unimaginable degree. For example:

• In the U.S. alone, more than 57 million people read blogs.

• More than 120,000 blogs are created every day. There are more than 1.4 million new blog posts every day.

• 22 of the 100 most popular Web sites in the world are blogs.

• 37 percent of blog readers began reading blogs in 2005 or 2006.

• Blogs have become "legitimate" news sources for many consumers, and blog sites like perezhilton.com, slashdot and others have reached record numbers of visitors.

Businesses have begun to understand the value of the blogosphere both as a community of consumers and as a resource for important information about consumer behavior. In fact, 89 percent of companies surveyed by the Pew Internet and American Life Project (www.pewinternet.org) say they think blogs will be more important in the next five years.

Here's why:

• Blog readers average 23 hours online each week.

• 1.7 million American adults list making money as one of the reasons they blog.

All that is available

Market researchers are challenged with the responsibility to collect all of the consumer feedback data that is available, anything that may provide the answers clients seek, whether by surfing the Web, blog mining or gathering intelligence from key influencers.

The open source nature (free from the influence of specific questions) of Web-based blog information engenders a level of quality difficult to achieve outside of the blog environment because it helps businesses view their products through consumers' eyes, without preconceived questions - i.e., the buzz factor. This lack of bias can be incredibly valuable in the early stages of a campaign when determining brand positioning. In addition, blog mining can be valuable for maintaining a pulse on consumer opinion over time and observing trended data.

Think of it as the Jeopardy! of market research; the answers are out there for questions that haven't even been asked yet.

That said, we believe the appropriateness of buzz monitoring varies depending upon the client and/or the situation. We find it's most useful for clients who want to determine the level of buzz surrounding the launch of a new product or campaign, an extremely positive or negative story in the press or competitive activity. For some clients it may be necessary to monitor buzz throughout the year, for others it might only be necessary when something significant occurs.

Missing out

Consider your next research project. Perhaps you are trying to uncover consumer opinion about a particular product or service from a specific demographic, which may be made up of core users of your product.

Are you missing out on new product uses that you might not have imagined? Are you neglecting valuable information from non-core users - people who may be using the product in different way?

Take, for example, Breathe Right strips, Hush Puppies shoes or Red Bull energy drinks. All of these products were launched and targeted for specific uses. Over time, as the products were exposed to more buyers, new product uses and user groups began to emerge. Because market research studies are intended to capture the opinions of core users, or specific demographics, companies may have missed valuable feedback from non-core users. With Breathe Right strips, the product was marketed and intended for use by athletes, but sales began to increase as a sub-group of the general population (snorers) were directed toward the product, in many cases by their physicians.

Of course, this is a fortunate problem to have, but imagine the benefits of this intelligence in the early stages of a market campaign. Do you suppose the users might have been blogging about the success they were having? What about the spouses of the snorers? How many of them might have been blogging about it?

Gauging the effects

Can you imagine assessing the impact of a PR disaster in real-time? Or gauging the effects of positive PR? Data collection could prove an invaluable tool for gauging the mood of consumers relative to PR disasters. For instance: How are consumers reacting to a food distributor's efforts to repair damage in consumer confidence after inadvertently distributing tainted products? As mentioned above, blogs and bloggers have influence; their views are posted for all to read. With real-time feedback in hand, imagine your company's ability to plan disaster recovery.

And, taking this thought a step further, think about monitoring changing perceptions after your company has made changes to its product or service. Wouldn't it be great to be able to measure the goodwill or positive feedback generated and to have the intelligence you need to better message these changes?

Let's look at a recent Hall & Partners client experience. The client, a dynamic new category entrant with a loyal following, was steered toward blog mining to monitor Internet-based buzz following a particularly negative incident that received a lot of publicity.

Traditional methods (omnibus and tracking research) showed within the first week following the PR blitz that the vast majority of category users were aware of the incident and that some negative attitudes had surfaced about the brand. Web monitoring showed a corresponding spike in mentions for the brand, but it was discovered within the first week that the most active and vocal consumers were quick to rise to the brand's defense and point out how other brands had suffered similar service issues. So, while the volume of discussion about the client's brand increased significantly in the first three weeks following the incident (three times the usual amount), the proportion of negative buzz was not any higher than what was seen before the incident occurred. Then, through continued monitoring, it was determined that the more positive view of the brand's advocates spread through a larger group of consumers.

In this case, Web monitoring was

important in two ways: First, it clarified the real nature of the brand buzz out there. Secondly, it clearly demonstrated the power of vocal, active digital consumers. Importantly, just as we are seeing with relationships between new and traditional media, new digital research is complementing traditional research rather than taking its place. In this case, the Web monitoring provided a robust, real-time pulse about consumer sentiment while traditional tracking provided depth of understanding among category users and client loyalists to supplement the Web monitoring trends among a broader online population.

Blog mining is a new means of gathering consumer feedback that should not be dismissed. That said, it is not an ideal means of gathering feedback in all cases, nor do we view this as a research replacement. Blog mining should be considered a research supplement, one that yields rich insights that may not be possible via traditional methodologies as evidenced in the case study above.

Mine the wealth

The technology exists today to mine the wealth of consumer information out there in the blogosphere. New data mining/predictive software uses "bots" (also called Web crawlers or spiders) to journey around the Web gathering very specific information. These scripts (small bits of software) methodically browse the Web for the right information - the information it is programmed to find.

We view Internet-based data collection as an excellent way to supplement traditional marketing techniques with unbiased, real-time consumer data. We now have an opportunity to incorporate behavioral data (monitoring what people really say and do on the Web) with attitudinally-based research findings to make sense of the new, digital consumer. Researchers can be there to mine all the Internet-based information available to help clients deliver better products and services. | Q

An unwanted impact

By Wally Balden

In the November 2007 edition of *Quirk's*, Kurt Knapton of e-Rewards and Rick Garlick of Maritz Research penned an article titled, "Catch Me If You Can." This article focused on the problem of poor-quality panelists and how they can be detected and minimized within a particular online study. The basis of the article was a cooperative study conducted by e-Rewards and Maritz Research that tried to better understand the severity of the problem, how it can be detected and what can be done to minimize the influence of undesirable panelists.

A number of important conclusions were drawn from this cooperative effort:

• Undesirable respondents are apparent in online research and are a cause for concern.

• Significant differences were noted in the response patterns between undesirable and desirable respondents.

• Eliminating poor-quality respondents positively impacts data validity.

Since that article was published, Maritz Research has conducted a number of Maritz Polls to better understand how poor-quality respondents impact data quality. While differences were found in response patterns in the earlier work, this article's purpose is to provide additional learning on how these differences actually impact the data and, most importantly, the decisions we make based upon that data.

Are undesirable respondents skewing your data?

Better understanding

Based on learning from the previous Maritz Poll, our overall objective was to gain a better understanding of the specific response patterns of undesirable respondents – and if they differed significantly from those of desirable respondents. Undesirable respondents were put into three categories:

• Fraudulent – respondents who intentionally misrepresent themselves in order to qualify for a survey or intentionally provide false or misleading answers.

• Inattentive – respondents who do not pay attention or do not provide thoughtful answers when completing a survey.

• Speeders – those who complete an online survey in an unreasonably short period of time.

Since critical business decisions may be at stake, the risk of making

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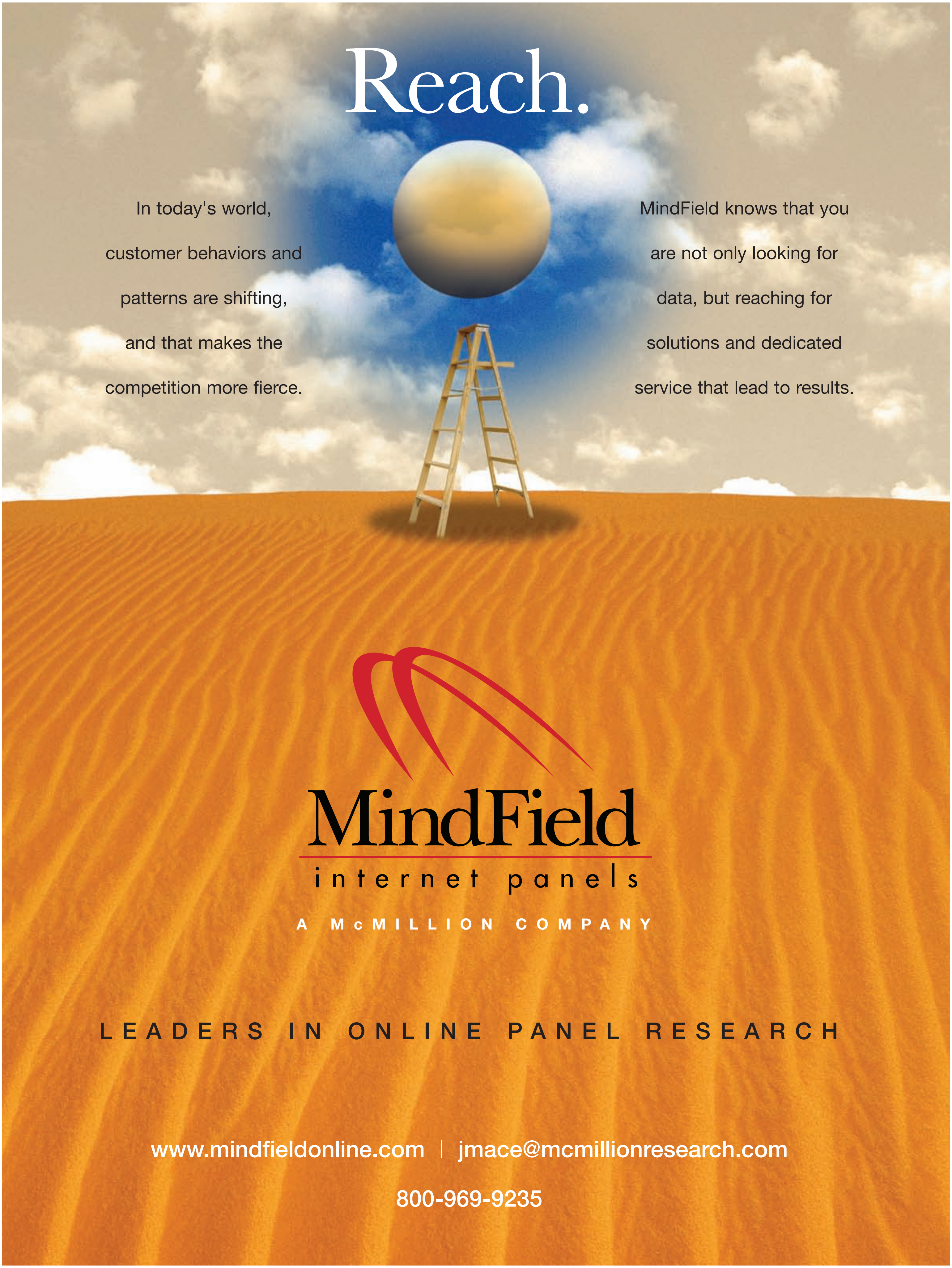
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a bad decision based on data provided by poor-quality respondents can be significant.

While our initial work helped us better understand the severity of the problem - how we can effectively detect undesirable respondents and what we can do to minimize the problem - we were still left with a number of important questions about the data:

- Do undesirable respondents provide different response patterns than truthful and engaged respondents?
- If differences are noted, are they meaningful?
- Can we identify response patterns that will help us better identify poor quality in future studies?
- Do we increase our risk of making a poor decision by including poor-quality respondents in the data set?

Debate within the community

The first step in the process was to identify fraudulent or inattentive respondents within the survey by setting a number of overt traps. Overt traps involve embedding specific questions within the survey to serve as traps. There is debate within the research community about using such overt traps. Some argue that overt traps tip the respondent to our intention and make them more aware they are being watched - which in turn makes them harder to catch when they exhibit cheating behavior. While we recognize this situation may occur, we haven't seen any evidence that the judicious use of trap questions makes the respondent more sensitive to our intentions. As such, we recommend they be employed in each online survey - again, in a judicious manner.

A variety of traps were employed within the Maritz Polls when they were deemed appropriate and within the context of the survey design. Examples of the types of traps employed are as follows:

- "Red herring" - providing a fake brand or service for awareness, usage and "purchase most often" questions - e.g., Tagrill fuel, Tagrill Airlines, Teen Town.
- Consistency of answer – fact-based questions asked at the beginning and end of survey - e.g., ask for zip code at beginning of survey and state of residence at end.
- Oppositely-worded - opposite statements that respondent agrees to - e.g., "I always buy the most expensive item on the menu," "I always buy the least expensive item on the menu."
- Specific instruction - respondent is instructed to check a specific response - e.g., "Please check slightly disagree." Note: We purposely instructed them to check either the second or fourth item in a five-point scale to guard against incorrectly categorizing them as attentive, as straightlining typically involves the use of the end or middle points in the scale.

The Maritz Polls, which served as the basis for this analysis, are conducted on a regular basis throughout the year. Topics for each of these surveys varied and included: insurance, automobiles, retail shopping

Table 1: Percent Trap Failure

	Red herring	Consistency of answer	Oppositely-worded	Specific instruction
Retail	10%	0.1%	NA	35%
Airlines	8%	NA	NA	18%
Technology	NA*	4%	43%	36%
Insurance	3%	1%	51%	26%
Auto	17%	19%	NA	8%
Travel	NA	NA	NA	6%
Employee	NA	1%	18%	8%
Financial	NA	NA	NA	14%

**Not asked on this survey*

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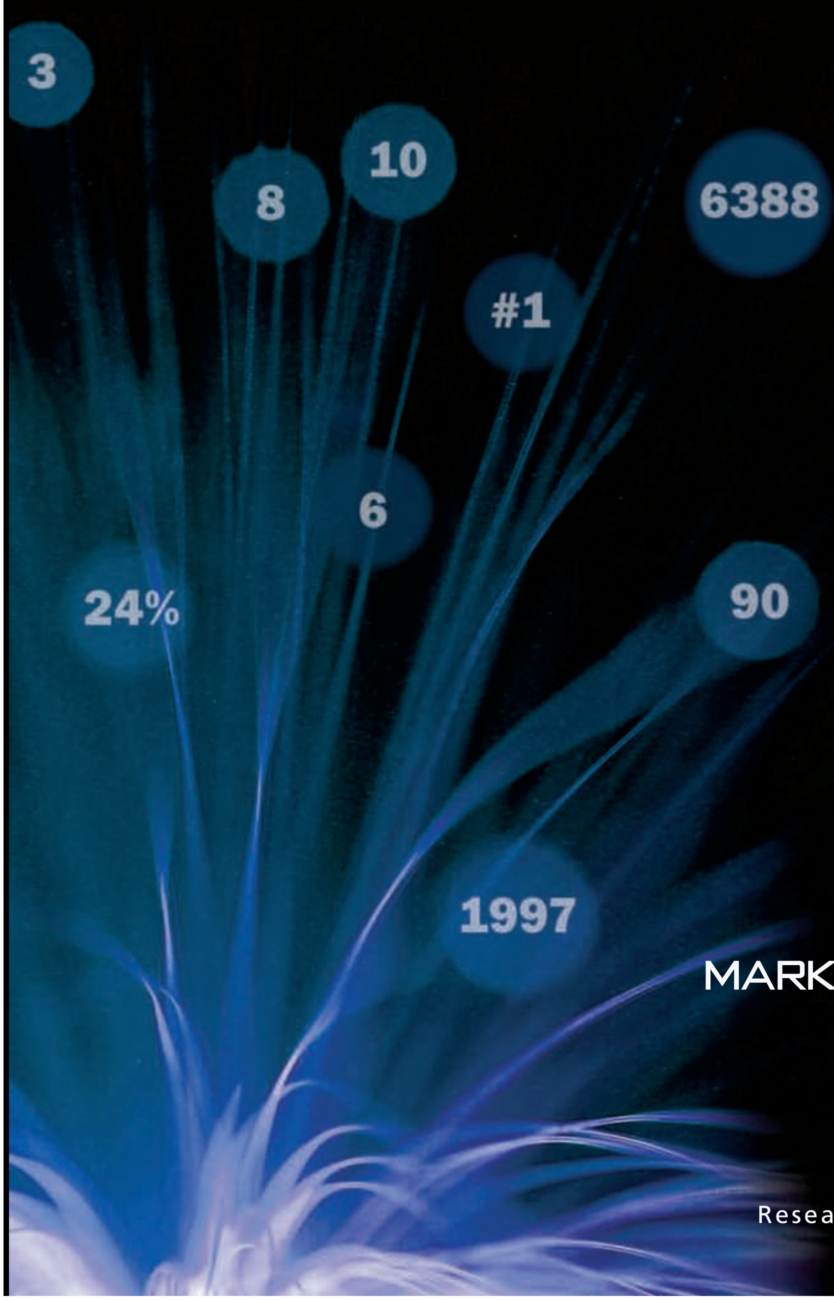

1997	Introduction of the **PRO𝚿T𝚿S** *research*Predictive dialer
24%	Minimum productivity increases; up to reported 320%
6	Month ROI on systems; most faster
90	Number of sites where **PRO𝚿T𝚿S** has been installed
6388	Number of *research* seats installed
10	Countries in which **PRO𝚿T𝚿S** has been installed
8	Optional modules including *research*Predictive Dialing, Manual Dial, Remote Interviewer Module, Remote Audio Monitoring, Inbound/Outbound Call Blending, Digital Sound Management, Call Transfer (IVR or Live), Multiple CATI System Interfaces
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habits, travel, technology, airlines and employee engagement. The sample parameters also varied for these studies, but for the most part we ended with a sample of 1,000 respondents, split evenly between genders. A variety of online panel suppliers were employed for these polls to determine if quality varied within a given panel supplier. Survey length varied from 10 to 20 minutes.

The studies that serve as the basis for this analysis were conducted over a six-month period, typically every four weeks. This worked in our favor since we approached this topic with little empirical evidence and were unsure what to expect. As we completed these studies and analyzed the data we began to introduce new variables into subsequent studies to gain a more complete picture of the data quality situation. Later studies helped us better understand the following:

• Does placement of a trap have an impact on inattentiveness, i.e., does disengagement increase as the survey length increases?

• Do long grids encourage disengaged behavior?

• Does length of grid have an impact on inattentiveness?

Being sensitive to the issue of overt vs. covert traps, we also conducted analysis of the summarized data set to look for inconsistency in response, straightlining and speeding.

Failure rate

To begin, let's review the failure rate we witnessed across the various Maritz Polls.

As shown in Table 1, failure rates were quite high for oppositely-worded and specific-instruction tasks. While this finding was initially surprising, subsequent exploration found this is consistent with other research in this area (e.g., Doxus - "Satisficing Behavior in Online Panelists").

Also evident in this data was the varying failure rate from study to study. This is attributed to three factors: subject matter of the questionnaire, length of survey and the inclusion of long grids and more complex tasks and exercises. Long questionnaires (20+ minutes) and those containing long grids or exercises had the highest percentage of trap failures.

We also tested a number of additional hypotheses regarding placement of the traps within the survey. Our findings:

• Failure rates were comparable, whether the trap was at the beginning, middle or end of the survey.

• Placing the trap within a grid or as a stand-alone question did not impact failure rate.

• Breaking a long grid into smaller grids did not impact the failure rate for the specific instruction trap.

These additional findings would lead us to believe that a disengaged respondent enters the survey in that state of mind - which conflicts with our earlier finding that failure rates were higher for surveys considered long, boring and more complex. Whether we encourage poor behavior by subjecting panelists to long, complex and boring surveys is a question that requires additional investigation.

Inconsistent responses

We focused additional analysis on disengaged respondents - those unable to follow a simple instruction - e.g., "Please check slightly disagree" or who provided inconsistent responses (I always buy the most expensive item; I always buy the least expensive item).

In three of the studies (retail, technology and insurance) we experienced high failure rates for these questions. There were commonalities among these studies - all were 20+ minutes long, contained long attribute ratings and the subject matter was not particularly interesting.

Based on our data analysis from these three studies, we uncovered the following patterns that differentiated disengaged from engaged:

Awareness, usage, purchase

Disengaged respondents exhibited a consistently higher (significant) level of awareness, usage and purchase compared to engaged respondents (retail survey). The reason for this is not known, although it could be surmised that providing positive responses at qualification-type questions will improve their chances of not being terminated.

Attribute ratings

Straightlining was strongly evident among fraudulent/inattentive respondents in all three studies.

When straightlining was evident, fraudulent/disengaged respondents primarily chose the midpoint of the five-point scale.

Significant differences were noted for the vast majority of the attribute ratings. Engaged panelists were more likely to spread their responses among the top three boxes in the five-point scale, while disengaged where clustered at the midpoint. This resulted in significantly higher (positive) attribute rating scores for the engaged sample.

Brand ratings

For questions related to brand relationship, emotion and personality there were significant differences noted between the two groups. Disengaged respondents were significantly more likely to connect an emotion or personality to a brand than engaged respondents - by indicating a yes vs. no. Yes was the first response on the display and easiest for the disengaged respondent to select.

Negative impact

Our ultimate objective was to determine if including data from fraudulent or inattentive respondents would have a negative impact on decision-making. We have numerous examples to choose from to help answer this question.

• Despite the significant absolute differences in awareness, usage and purchase we did not see a change in relative rankings of the brands on these measures.

• Midpoint straightlining by the disengaged sample led to lower overall attribute ratings - however the relative rankings of any of these attributes did not change.

• Absolute differences noted in the brand ratings (relationship, emotion, personality) did not impact the relative positions of the brands.

These examples indicate that relative rankings were not impacted by the inclusion of poor-quality respondents. If ranking is more important than absolute score, then decision-making would not be impacted. However, this situation would change if objectives or targets were set for the various measures, such as awareness, usage or purchase. In addition, there would be concern if this was an ongoing tracking study. If the balance of undesirable/desirable is not maintained, we would expect to see a spurious movement in scores at each wave. The same impact could occur if we became more vigilant in future waves and reduced the number of undesirables that are part of the ending sample.

Behavior is evident

This exercise's purpose was to gain a better understanding of the issues we face when poor-quality respondents are included in the data set. We conclude the following:

• Fraudulent and inattentive behavior is evident in studies involving online panels.

• Fraudulent or inattentive panelists answer differently than truthful or engaged panelists.

• Straightlining and satisficing behavior are more likely among fraudulent/inattentive respondents.

• While relative position of brands/attributes was not impacted by the inclusion of disengaged respondents for these studies, care should be taken if this data is collected as part of an ongoing tracking study

A word of caution: This was by no means an all-encompassing or complete evaluation of the impact of inattentive or disengaged panelists on data quality. Work by other researchers both supports and refutes these findings. However, the fact that we have uncovered consistent differences in a number of different studies should serve to heighten awareness and raise the caution flag.

Ultimately, we must all be more vigilant in identifying and removing undesirable respondents - or minimizing them - at every step of the research process. This vigilance goes beyond simply setting traps in surveys. We must establish best practices at each step in the research process to ensure we are providing only the highest quality data available. The risks of making a bad decision, based on poor-quality data, are much too great to ignore the issue. | Q packaging research

New and improved indeed

Documenting the business value of packaging innovations

By Scott Young

It is well documented that packaging has a direct impact on sales, most notably in influencing many purchase decisions that take place at the point of sale. Research studies also repeatedly find that innovative packaging systems (new shapes, materials, dispensing systems, etc.) are very powerful in their ability to differentiate brands, justify price premiums and/or increase brand loyalty.

Just as often, however, potentially valuable packaging innovations are not implemented. These missed opportunities are often rooted in the fact that marketers and engineers speak different languages and approach packaging from nearly opposite perspectives:

• Packaging engineers tend to consider packaging primarily in terms of its functionality and focus on rational benefits (easier-to-open, etc.).

• Brand managers tend to think primarily in terms of return on investment and focus on incremental costs and sales revenue.

Since many packaging innovations require significant up-front investments (for retooling, etc.) and/or incremental costs-per-unit (via more expensive materials), they often turn into a roadblock of sorts: Engineers can demonstrate that the new system provides a functional benefit, but they can't provide marketers with the evidence (of increased sales revenue) that they need to justify an investment.

Consumer research can bridge this gap and help companies make informed packaging development and investment decisions. With this thought in mind, I'll discuss how research can help gauge the business value of new packaging innovations. I'll also point out several potential barriers to innovation, which are rooted in the way that companies approach and assess new packaging systems.

Benefit greatly

When new packaging concepts are first developed, they benefit greatly from qualitative research (in-depth discussions with small numbers of target customers), which provides the insight needed to identify and address concerns. Conversely, quantitative research (surveys with hundreds of people) is inherently less diagnostic, and it typically leads companies to declare winners and losers (and to simply discard the latter). For example, in a recent study, we found that a new packaging structure for liquid soap was strong on a functional level but had a shape that suggested a lower-end product. If we had conducted

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survey research, this idea would have simply been rejected. However, the qualitative research setting allowed us to pinpoint the source of the problem and guide refinements that saved the idea.

In fact, the way companies test new ideas can also stifle innovation by killing ideas before they are fully developed and refined. Here, the problem is often rooted in what we call the rush to judgment. Given the costs of creating functional prototypes, companies are eager to gather numerical evidence before investing further in a concept. This leads them to present new concepts to customers through drawings and written explanations, which rarely produce the same depth of feeling from customers as a functional package. As a result, these studies will often understate the impact of a new structure: They will generate the precise numbers desired for decision-making, but they may be misleading numbers. Overall, at the early stages of packaging exploration and development, more will be learned from watching 20 people actually use and discuss a package than from surveying 200 people regarding a drawing and/or concept statement.

From the marketers' perspective, however, qualitative research is often not enough. Due to the small sample sizes (usually 20-30 people), qualitative research cannot provide numerical data. In addition, it is far removed from the purchase experience, and thus cannot provide evidence of impact on shoppers' decision-making. Therefore, while focus groups are valuable in providing initial direction and narrowing down a wide range of options, they are not an appropriate tool for documenting the added value or the business impact of a packaging innovation. For this reason, survey research is needed to justify investments in new packaging systems and guide final go/no-go decisions.

Document potential benefits

Of course, the value of quantitative research is tied directly to its comprehensiveness. Specifically, it is important that survey research document all the potential benefits of a new/proprietary structure. In our experience, we've seen that a new packaging system can influence shoppers on three levels:

1. Increased shelf impact/visibility

A unique packaging approach can be a valuable weapon in the battle for consideration and recognition at the point of sale. The difficulty of breaking through shelf clutter should not be underestimated: Our studies have shown that even when shoppers are directly considering a category, over one-third of the brands displayed are ignored completely. However, a unique, engaging structure can help ensure that a product consistently draws shoppers' consideration and drives impulse purchases.

2. Enhanced product perceptions and brand imagery (before use)

Time and again, we've seen that packaging structures can influence product perceptions. Women's antiperspirant packaging provides a good case in point. In a study, we found that Dove's taller, thinner package suggested a more feminine and clean product than competing products that were housed in thicker and more uniform packages. In other words, even though it did not provide a rational/functional advantage, it increased the likelihood that shoppers would buy Dove. An "own-able" structure or delivery system (such as Coca-Cola's contoured bottle) can also provide a powerful linkage to brand heritage or relevant imagery. In a study, for example, we found that a certain shape conjured up customers' memories of old milk bottles, and linked to their nostalgia for simpler times in a consistently positive way.

3. Functionality and satisfaction after use

Of course, a new structure that provides functional benefits can lead to an improved usage experience, increased customer satisfaction and ultimately to stronger brand preference and loyalty. However, it is important to remember that only people who use the product will experience the functional benefits. In other words, unless a packaging innovation is clearly visible and/or well communicated, it may not contribute significantly to business value.

In order to document all of these potential sources of value, a comprehensive packaging study should simulate both the shopping and the usage experience. Moreover, it should measure a packaging system's shelf visibility and impact on product perceptions before usage. If the packaging gets lost on shelf, or if it sends the wrong initial message, it will never get the chance to function.

Document the impact

Ultimately, to provide "evidence" that a new packaging system will provide business value, it is necessary to simulate the introduction of the new system and document its impact on shoppers' decisions.

For this reason, the single most important principle is to evaluate each new packaging innovation on a monadic basis, in the context of competitive packaging. In other words, one group (cell) of target shoppers (perhaps 100-150 category shoppers) should encounter the current packaging in the context of primary competitors - and be asked to evaluate each package and make a purchase decision. Another matched group of 100-150 target shoppers should encounter the new/proposed packaging in the identical competitive context - and go through an identical interview process (evaluating packages, stating preferences, etc.).

By comparing data across the different groups (those who saw current packaging vs. those who saw proposed packaging), a study can document the impact of a packaging innovation on consumers' attitudes (implied product perceptions, brand imagery, perceived functionality, anticipated pricing, etc.) and, more importantly, on their preferences/purchase decisions. In other words, a study can isolate and measure the impact of a packaging innovation along two measures directly related to business value:

- the impact on preference vs. competition (market share);
- the ability to justify a higher price without losing share (pricing).

These measures allow marketers to translate functional benefits into an informed estimate regarding the economic impact of a packaging change. Specifically, they allow marketers to address the primary questions on their mind:

- "If we introduce the new package without changing the price, will we pick up enough market share to justify the investment?"
- "Will we will be able to pass along the additional five cents per unit without losing any market share?"

Conversely, the most misleading findings come from studies in which companies attempt to project the added value of a new packaging system by asking people directly about how much more they would pay for a particular benefit. Unfortunately, pricing is perhaps the single area in which customers are least likely to be honest with interviewers. In other words, if you ask a person directly if he or she would pay more for a new and better package, the answer will usually be no. However, if you introduce that better packaging system at a slightly higher price, you may very well find that people do not notice the difference, or are actually willing to pay more.

Commitment and process

Ultimately, we've found that innovation is a question of commitment and process. The exceptional companies recognize the potential value of proprietary packaging, and they invest the time and resources needed to properly develop and fully assess new concepts. As importantly, the marketers and packaging engineers in these companies speak the same language through mutually-understood research processes and measurement systems. For if there is one reality in the marketing world, it is "That which is not measured is not fully valued." | Q

packaging research

Begin at the beginning

By Jerry W. Thomas

The market is changing, and the time has come to redesign the package of that old established brand. This will revitalize the brand, the marketing manager supposes. Or, a new product with great promise emerges from the laboratory and a new package must be created from scratch. In both of these instances, the process of developing a new package tends to be the same. The package design firm attempts to get the client (the brand manager, the new products manager, the marketing vice president, etc.) to lay out the vision for the new package.

In a perfect world, the client would have a clear vision and accurately communicate this vision (meaning marketing goals and packaging objectives) to the package designers. However, the manufacturer's vision is often clouded with confusion and omission, and the result is no direction or poor direction for the new package design work.

Regardless of the clarity of the manufacturer's vision, the package design firm goes off, ponders the vagaries of the universe and creates 20 or 30 rough designs for the new package. Typically, these designs are screened by the marketing executives and a few designs are chosen for further development. These finalists then go through another round of managerial reviews and a new design is chosen, based on the "expert" judgment of the marketing staff.

The stage is now properly set for a marketing disaster; poor package design is often a major cause of marketing failure.

Research should be involved at the outset of any (re)packaging process

Never smart enough

If the marketing professionals had flawless judgment, marketing meltdowns could be avoided. Unfortunately, marketing departments are never smart enough to see the market, or the new package, through the eyes of the average consumer. The marketing staff knows too much and is blinded by that knowledge. The marketing staff is biased by the mythologies of their profession, industry and company. The marketing staff is rarely similar to or representative of the ultimate consumers of the product (the marketing professionals tend to be much better educated and much higher in income than their customers). Also, marketing folks are often shielded by the corporate bureaucracy from the realities of the messy, helter-skelter marketplace. Lastly, two or three marketing executives

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are too small a sample for their decisions to be statistically reliable.

So, marketing executives and their judgments cannot be trusted. Can we turn to research for assistance, or is the research itself flawed?

Marketing research is not perfect. It has its biases and its blindness. Research tends to favor the status quo. It's an inherent bias in virtually all marketing research. This tends to mean that an existing package, the benchmark, will almost always outscore a new package design. This bias must be understood and taken into account in interpreting the results of packaging tests. There are many other research pitfalls (sampling problems, study design issues, questionnaire problems, analytical problems, etc.) that can invalidate the research. That's why you must often rely on researchers with some gray hair, wrinkles and humility to help oversee the research design and the interpretation of the research results. Despite its limitations, research improves the odds of success, compared to three or four executives sitting around a conference table.

Back to the beginning

What are the keys to using research to develop and evaluate package designs? Let's go back to the very beginning of the process, the prepackage design phase. The research should ideally begin at the beginning. Good qualitative research can be invaluable in helping marketing executives set the correct goals and objectives for the new package design. This qualitative research should include an ethnographic component, the observation of shoppers in a natural retail environment, and perhaps in a usage environment. How do consumers shop the category? How much time do they spend in front of the display? How many packages do they pick up? How many shoppers read the details on the label? How many packages of what sizes are purchased? How does the consumer interact with the package in the home before, during and after usage?

After observations of actual shopping and usage behavior, in-depth interviews should be the next step. What are the primary motivations and perceptions that drive brand choice? Are respondents aware of brand names or do they buy based on the color and design of the package? Are they aware of advertising in the category, and are they aware of advertising for specific brands in the category? Can they remember and describe the existing packages in the category? What do they remember, or think they remember, about these packages? Do they buy one brand only, or shop around and buy different brands from week to week? How frequently do they buy the category and the brand? How frequently do they interact with the package once it arrives in the home? A breakfast cereal package, for example, might sit on the breakfast table every morning for a week before the package is discarded. A frozen-food package, on the other hand, may only be seen once when it is pulled from the freezer and opened. What are the advantages and disadvantages of the packaging and graphic designs for each of the major brands in the category? All of these little details, once fully understood, can help the marketing professionals set clear and relevant goals for the new package design. Helping to define and set the correct goals at the outset of the design process is perhaps the single most important contribution of research. Once the design goals are set, the package designers are ready to go to work.

As noted, the designers will typically create a large number of rough designs (anywhere from 10 to 30 or more early-stage designs). The goal of research at this point is to identify the better designs and screen out the "dogs." Typically, this screening is done via online surveys. A sample of 200 to 300 target audience consumers are shown all of the rough designs (that is, each respondent sees every one of the designs in randomized order) and answers several questions about each design, such as:

- attention value;
- purchase interest, based solely on the package design;
- uniqueness or dissimilarity to competitive packages; and
- fit to or compatibility with the brand.

The results of these questions are combined into a scoring model so that all of the package designs can be ranked from best to worst. The output of the model is the identification of the four or five "better" designs.

Note: an alternative approach at this early stage is the creation of a number of rough package designs with the elements systematically varied according to a choice-modeling experimental design. In this approach, each respondent sees a test package in a competitive context and chooses the package she would buy. Different respondents see different sets of package designs, with different elements, illustrations and messages. Then, the statisticians crunch all of the numbers and mathematically infer the importance of the various variables and measure the relationships among the variables. Based on this enhanced understanding of the utility or importance of different variables that make up the package design, a small number of improved package designs can be created for the final stages of testing.

Fine-tuning

Regardless of method, once the "better" designs are identified, they are often put through another round of qualitative research (generally, depth interviews are better than focus groups as they can dig down into the details more extensively). The goal of this qualitative research is improvement and fine-tuning of the better package designs. Every little detail of each design is explored in these one-on-one interviews, searching for any little tweak that could improve consumer reactions to the packages.

The final step is to take each of the "better" designs, as improved by the qualitative review, and test each design against a constant set of major competitive packages. Ultimately, each package design must be evaluated in the context of this competitive environment. Each test package is placed in a simulated display, similar to a display the consumer might see in a typical store. Each package design is tested monadically among a representative

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sample of target-market consumers (identical or matched samples of consumers see each test package in a competitive context). At this stage, sample sizes might be 300 to 500 consumers per package design. Some of the key measurements are:

- attention value of the package design;
- purchase intent and share of market versus competitive packages;
- expected purchase frequency;
- brand fit or compatibility;
- image projected by the package design; and
- pricing expectations related to the package design.

Naturally, one of the matched sample cells is exposed to the existing package design in the same competitive context as a control or benchmark (the existing package). The test package must come very close to, or equal, the results for the existing control package, before a change to a new package is recommended (remember, the status quo bias in marketing research).

The exact nature of the testing at this final stage can take many forms. For example, displays can be simulated and the testing accomplished online. Virtual online simulations of in-store environments with simulated shopping displays can be used as the format for the final testing. Or, actual displays can be constructed and target market consumers recruited for in-person interviews. Tachistoscopes (or timed exposure) can also be employed to show the packages for fractions of seconds to help identify the attention value and recognition of various package elements (ideally used as a supplement to traditional methods), and/or eye-tracking cameras can be used to see which package elements attract the eye in what order (again, recommended as a supplement to traditional methods).

If there is any possibility that the new package design will negatively affect the product inside, in reality or in perception, an in-home usage test (or test in the product's natural usage environment) is always recommended. The product in its new package is placed in homes of target consumers and they are asked to evaluate only the product itself. These results can be compared to results for an identical in-home usage test of the existing (or old) package. If the new package improves perceptions of the product inside, then you may choose to invest more money in introducing the new package. If the new package negatively affects perceptions of the product, then you should go back to the drawing board and start over.

Great care

In the final evaluation of new package designs for an established brand, great care must be taken to ensure that the new package design is not so different as to break continuity with existing consumers. We have seen radical new package designs trigger precipitous declines in a brand's market share. The greater a brand's market share, the greater the risks associated with a radical change in package design. If a brand has a tiny market share, the downside risks of a new package design are much lower. Any radical change in package design for an established brand should be supported with massive advertising, as though a totally new product were being introduced.

Finally, if a brand is not adequately supported with media advertising, the packaging must play a greater role in the brand's marketing. Without advertising support, the face of the package must be thought of as the principal advertising medium. This makes packaging research even more important, because the package has to carry the preponderant burden of marketing the brand.

Positive momentum

An optimal package can create positive momentum for a brand. Major competitive packages change from time to time, however, and destabilize the product category, so package designs must be updated periodically and the whole research cycle must be repeated. Packaging is a moving target. Winning the competitive battle at the final point of purchase, the ultimate moment of truth, is the promise and potential of good packaging research. | Q




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mystery shopping

Built well to work well

By Michael J. Britten

The value of mystery shopping as a management tool seems to be unquestionable. The increasing numbers of businesses that use internal or external shopping programs and the variety of businesses that utilize mystery shopping speak well to its value. However, value is dependent on program design. This article supports the proposition that mystery shopping can provide both operational and strategic data if designed to do so. Without forethought and careful planning, mystery shopping will be a step or two short of reaching its potential as a value-added business tool.

Spoken in contemporary terms, mystery shopping is a tough gig! It can yield great results or produce turmoil within the organization. It can devour thousands of hours of internal employee time as quick as a tiger or run month after month without a hitch. As a casual motivational tool or a component of a sophisticated incentive program, mystery shopping must have leadership and be managed as a value-added component that measures business processes and personnel performance. Experience tells us failure is most likely due to a lack of internal leadership, leadership in the shopping firm or an organizational disconnect between strategy and front-line implementation, which in itself is a leadership and management issue.

Focus on goals

Mystery shopping must focus on goals and these goals require periodic review. Without goals, the folks who sit around a big table reviewing budgets will likely ask these questions, "Why are we doing this?" and "How does mystery shopping increase our margins?" Goals are often tilted toward the function within the organization that owns mystery shopping. Operational folks have their shopping agenda as do marketing and human resources. I knew of a food services organization that had three distinct shopping programs. It was so confusing to front-line personnel they never even looked at the reports but eagerly accepted the incentives. Just as a camel is known as a horse designed by a committee, a questionnaire with 95 questions is one that was designed by an organization without specific goals for the shopping program. After all, while most shoppers are intelligent people, not many have the 155 IQ

The best mystery shopping programs have both operational and strategic value

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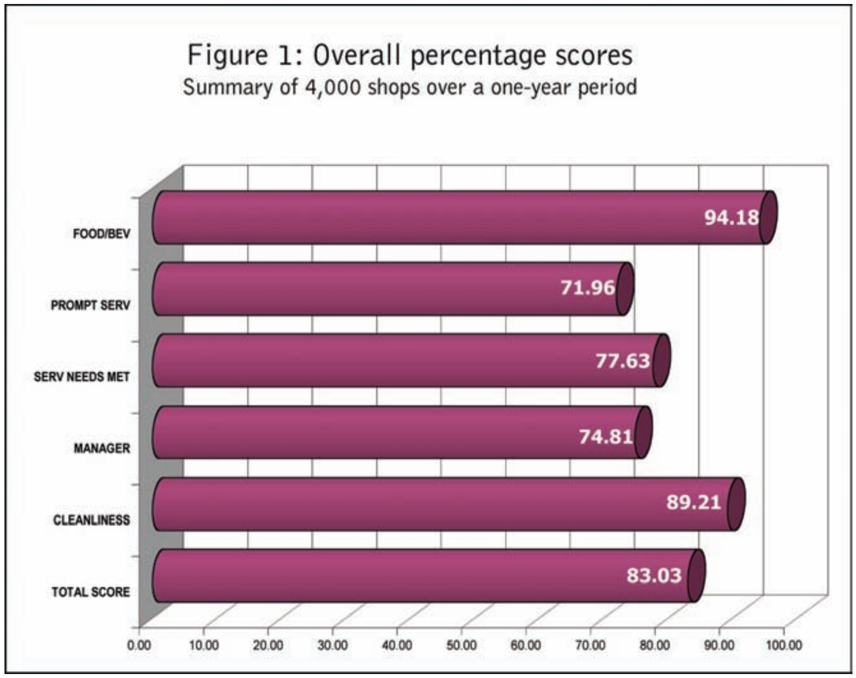
it takes to accurately complete a 95-item questionnaire.

First, a decision must be made that defines strategic and operational parameters. This usually begins with clearly defining the owner of the program. Human resources owners often focus on selection and training or design a system to administer incentive programs. While the marketing folks are brand-driven, the operations personnel often want to know how mystery shopping will affect incentives and bonus. None of these approaches are wrong but there are risks in designing a process that encompasses several agendas. Having said that, I believe mystery shopping can be designed to meet both operational and strategic needs. However, this decision must be made early in the design process.

Conceptually, operational shops are more likely to gather descriptive data and shops that are geared more to the strategic side are designed to gather descriptive and predictive data. For example, while yes/no questions are appropriate, they have very little value for higher-level analysis. Scaled questions are appropriate for each. However, the type of scale used is often a point of discussion. Some prefer a forced-choice, even scale and some an odd-numbered scale with a neutral point. Since some of the strategic calculations are based on variance, a longer scale will likely produce more variance and make the calculations more definitive. I'm not a big fan of a 10-point scale because the typical American mind believes that five is the mathematical midpoint of 10. I do, however, prefer a six-point forced-choice scale. It forces the respondent to make a conceptual choice between agree/disagree, important/unimportant or other concepts and it opens the scale a bit farther than a five-point with a fence-sitting value.



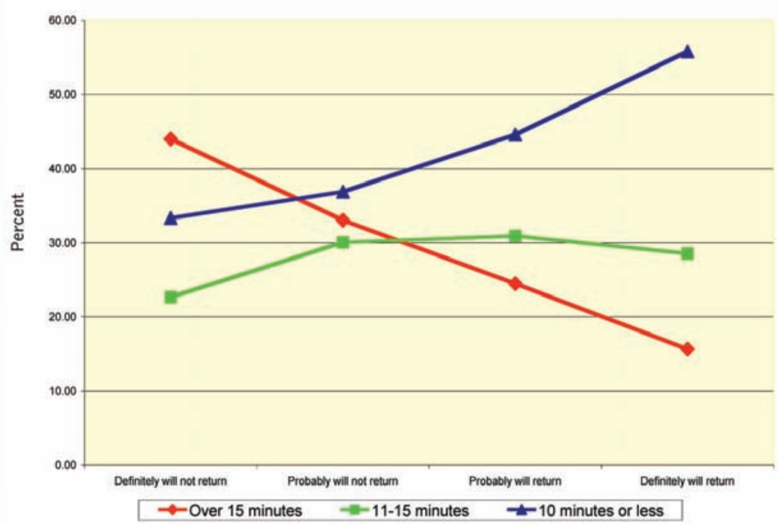
If the questionnaire is designed to produce data which can be used operationally as well as strategically the value to the organization becomes much greater. For example, it is great to have daily, monthly and quarterly data that can be used for operational monitoring, incentives, financial performance and many other purposes. In the long run, it is also advantageous to define the best predictors of overall satisfaction and other critical factors. It is important to understand that out of 30 or so questions, three or four have the most impact on overall satisfaction. This process identifies and defines strategic focus.

Data plateau

A new shopping program generally produces positive improvements for a few months and then the data plateau. If incentives are part of the process, they too plateau and internal dissatisfaction with the shopping program grows. Managers and employees will be heard saying, "It's the same old stuff month after month. They are saying the same things over and over." A strategic look at the data will not change this but will provide insight into further improvements and perhaps a different focus for the mystery shopping program. Mystery shopping should be a learning and evolving process and

Figure 2: The effect of order delivery time on repeat business

Summary of 4,000 shops over a one-year period



while core questions are set in stone, much of the focus should be subject to change. In fact, the ability to evolve and grow should be a core feature of the program.

Figures 1 and 2 depict a corporate-wide look at the impact of food delivery time on the shopper's perception of returning to this restaurant. An operational view may tell each manager this is an issue on a quarterly basis. However, from a strategic standpoint, in this case, after over 4,000 shops at over 150 locations in one year, the data speak well to the issue of prompt service. If program design permits, corporate process and policy makers have several options. One, utilize regression to identify which service variables are indeed the best predictors of overall satisfaction. Two, compare data from specific business processes and personnel performance to service standards, thereby establishing improvement metrics. And three, determine if customer perceptions match personnel and process strengths and if business processes utilize personnel strengths to the fullest extent. When one combines the information in these two charts with other data pointing out that 80 percent of those who said their service needs were not met also indicated they "definitely will not return," there is an obvious need to examine the entire service sequence strategy.

There may also be other hidden or less obvious issues. For example, if a top-notch waiter has a two-hour prime-time window, he is thinking about three table turns during that time. At an average ticket per table of

$60 he will make about $36 in tips in this two-hour time frame. However, if the kitchen is slow to deliver he misses a table turn and receives $24 in tips and begins looking for a different job. Operational data will suggest a need to examine the service sequence and strategic data will confirm the need for policy and process change.

Limited sampling capacity

We must keep in mind that as a research tool, mystery shopping has a very limited sampling capacity. It is a customer's perception and randomness is only found by sampling day of the week, time of day, service or product, etc. Some shopping systems include shopper demographics, which support further analysis of shopping data. Mystery shopping is a transaction-based process from an operational standpoint and more of a relationship-based process from a strategic view. This leads to a basic dilemma. A shopper who has not shopped several times at a given client's business does not have the capacity to respond accurately to relationship questions. This shopper may provide an expert perspective of the transaction but lacks the relationship-based perspective of a frequent customer.

Operational and strategic shopping processes rely on qualitative and quantitative data. In a nutshell, scaled and yes/no questions often answer the question, "How are we doing?" Open-end questions and verbatim comments often address the issue of, "What must we do to improve?" A good coding system will turn verbatim comments into very useful strategic data. For example, 2,000 comments may be coded into a dozen or so categories. These categories may then be utilized to describe and understand certain situations and provide clues to improving business processes and personnel performance. A process that combines factor analysis with regression can yield a sophisticated weighting system for mystery shopping data and eventually dismiss questions that do not contribute to the process. This process may reduce a 65-item questionnaire to a 40-item questionnaire and actually improve the validity of the instrument, thereby effectively using a strategic approach to maintaining a contributing and functional shopping program.

Operational and strategic value

Mystery shopping should, and can, have both operational and strategic value to the organization. However, overall program design will determine how the balance between the two actually contributes to logical improvements. Most organizations seek and hire the talent needed to make sound business decisions. They rely on the wisdom of the decision makers and objective data to support intelligent decision making. Mystery shopping programs that are designed to be flexible and provide operational and strategic data are a tremendous business tool and can bring considerable value to the organization. | Q

Survey Monitor

continued from page 8

The study found that 55 percent of newspaper Web site-only users are female, while 48 percent of crossover users are female. The main reasons newspaper Web site-only users cited for using newspaper Web sites include: accessing local news (84 percent); entertainment information (74 percent); food or restaurant information (58 percent).

Newspaper Web site-only users are Web-savvy group: 52 percent write or read blogs and 46 percent have joined a Web community.

The two segments differ in the time of day they are using newspapers. Crossover users are more likely to read their printed newspaper in the morning (63 percent read the printed newspaper before 10 a.m.) and access their newspaper Web site in the afternoon or evening (46 percent).

Newspaper Web site-only users are more likely to access the Web site in the morning (49 percent of Web site-only users access the Web site before 10 a.m. vs. 34 percent of crossover users). Eighty-seven percent of crossover users report that their time spent with newspaper media has increased or remained the same versus only 12 percent who say time spent has decreased. For more information visit www.nnnlp.com.

Do-Not-Call Registry a rare success story

Not only does the Federal Trade Commission's (FTC) Do-Not-Call Registry continue to have great success, but the agency has also done well at alerting people that their registration expires and a renewal is necessary.

Just under three-quarters (72 percent) of Americans have registered their telephone numbers for the Do-Not-Call Registry. Of those who have registered, very few people say they get as many telemarketing calls as before they signed up (6 percent) and only 1 percent say they get more than before they signed up. One in five (18 percent) report that they currently get no telemarketing calls with three in five (59 percent) reporting that they still get some, but far less than before they signed onto the Registry and 14 percent saying they get some, but a little less than before they registered.

These are the some of the results of a Harris Poll of 2,565 U.S. adults aged 18 or over surveyed online between October 9 and 15, 2007 by Harris Interactive, Rochester, N.Y.

While seven in 10 of those who are registered (71 percent) say they know that the Do-Not-Call Registry expires and they will have to renew their registration, 29 percent unaware of this fact. Interestingly, those in the West and those who have post-graduate degrees are less likely to be aware they will have to renew their registration (33 percent for both).

What is a true testament to the success of the Do-Not-Call Registry is the overwhelming response when those who are signed up are asked if they will renew their registration. Almost everyone (96 percent) says that they already have or will renew their registration. One-quarter (25 percent) have already done so and 71 percent plan on renewing their registration. Just 2 percent say they will not and an additional two percent are unsure.

With the pessimistic attitude toward a great deal of what Washington does, it is rare to see a government agency enjoying such a success as the FTC and the registry. When very strong majorities of Americans not only sign up for something that the government proposes, but then also say it is working, that is worth noting. Further evidence of how well Americans regard this program is in the 96 percent who plan to renew. For more information visit www.harrisinteractive.com.

Most feel attending worship services gave them good moral foundation

Study results released by Ellison Research, Phoenix, Ariz., show that only 7 percent of all American adults have not had any point in their lives when they regularly attended religious worship services (attendance of once a month or more). Just over half of all adults (51 percent) say they currently attend religious worship services of some kind once a month or more, leaving 42 percent who can be considered lapsed - meaning they attended regularly at some point, but no longer do so.

Most of this previous attendance was during childhood. Nine out of 10 adults attended religious worship services regularly at some point before the age of 18, including 86 percent of those who no longer attend today

However, it appears childhood attendance is becoming less and less common. Among people who do not regularly attend worship services today, 24 percent of those under age 35 also did not attend as a child, compared to 13 percent among people age 35 to 54, and just 9 percent of those 55 or older.

The findings are from a study independently designed and conducted by Ellison Research among a representative sample of 1,007 American adults. The sample was balanced by gender, age, income, race and geography.

Most Americans who attended religious services at some point during childhood look back on their experience in a positive way. Sixty-six percent believe their religious attendance before age 18 gave them a good moral foundation, 62 percent say it's something they are glad they did, 57 percent believe it gave them important religious knowledge, 50 percent believe it helped them grow spiritually, 47 percent feel it helped them prepare for life as an adult, and 43 percent say it deepened their spiritual faith.

On the other hand, 19 percent believe their childhood experiences turned them off to organized religion, 15 percent believe their childhood religious attendance is not relevant to their life today, and 13 percent feel it helped send them down a different spiritual path than the one they were taking at that time.

Not surprisingly, attitudes about

childhood religious involvement vary substantially according to whether the person is still regularly attending religious services. Among those who currently attend services, the vast majority have positive things to say about their childhood religious attendance. For instance, 62 percent believe it helped them grow spiritually, and 75 percent believe it gave them a good moral foundation.

But even among those who have abandoned regular religious attendance, the view of their childhood attendance is more positive than negative. On the positive side, 55 percent feel their childhood religious attendance gave them a good moral foundation, 48 percent say it gave them important religious knowledge, 35 percent believe it helped them grow spiritually, 34 percent feel it helped them prepare for life as an adult, and 27 percent say it deepened their spiritual faith. On the negative side, 31 percent say their childhood attendance turned them off to organized religion, and 24 percent believe their childhood involvement is not relevant to their life today. Thirteen percent believe it sent them down a different spiritual path than the one they were on at that time.

All in all, 51 percent of Americans who attended religious worship services at some point during childhood, but who do not currently do so, still say they are glad they attended as a child.

Fifty-six percent of all adults who attended religious services in childhood feel that attendance has made them more interested in religion as an adult, including 33 percent who say it has made them much more interested in religion. Only 18 percent believe childhood attendance decreased their interest in religion as an adult, including 11 percent who believe it strongly decreased their interest. The remaining 26 percent believe their childhood attendance did not impact their interest in religion as an adult.

Again, these numbers vary dramatically according to whether the person is still regularly attending religious services. Among those who currently attend, 78 percent believe childhood involvement increased their interest in religion as an adult, while 14 percent feel it had no impact, and 8 percent say it decreased their interest in religion. Among those who do not currently attend services regularly, 30 percent still believe childhood attendance increased their interest in religion, while 40 percent believe it had no impact, and 30 percent feel it decreased their interest in religion.

Seventy-three percent of adults who attended worship services at some point before age 18 feel this attendance has had a positive influence on their life, including 40 percent who feel it has had a highly positive influence. Eighteen percent say their attendance as a child did not influence their life at all, while just 8 percent feel it had a negative influence on their life (including only 2 percent who feel childhood religious attendance had a highly negative influence on them).

Among those who continue to attend worship services as an adult, 87 percent believe attending as a child had a positive influence on their life, while only 4 percent say it had a negative influence. But even among those who no longer attend religious services, 56 percent believe their childhood attendance had a positive influence on their life, including 21 percent who say it had a strongly positive influence. Thirty percent see no influence on their life from their childhood religious involvement, and 14 percent believe it negatively influenced them, including just 3 percent who believe the negative influence was strong.

All adults who attended religious services as a child can therefore be divided into six categories: 48 percent believe attending as a child had a positive influence on their life, and they continue to attend services today; 5 percent believe attending as a child had no influence on their life, but they continue to attend services; 2 percent believe attending as a child had a negative influence on their life, but they still continue to attend services; 25 percent no longer attend services, but they believe attending as a child had a positive influence on their life; 14 percent no longer attend, and believe attending as a child had no influence on their life; and 6 percent no longer attend, and believe attending as a child had a negative influence on their life

These findings should refute claims that having children attend religious services will negatively impact them, says Ron Sellers, president of Ellison Research. "There have long been claims from some in the atheist community that taking children to religious services is harmful to their development," he says. "According to the vast majority of adults who have themselves been through the experience, this is simply not true. Only about one out of every 17 people who attended religious services at some point during their childhood feel this had a negative influence on their lives and no longer attend services. At the same time, almost three out of four believe it had a positive influence on their lives, whether or not they still attend. Today's adults are, by and large, glad they attended worship services at some point during their childhood."

These findings should have some influence on parents who may be deciding whether or not to have their children attend religious services, Sellers says. "Today's adults are over 20 times more likely to feel attending worship services in childhood had a highly positive influence on them than to say this had a highly negative influence on them. Even adults who no longer are involved in religious attendance are seven times more likely to cite childhood religious attendance as a highly positive influence on their lives than as a highly negative influence. Clearly, most adults believe the reward far outweighs the risk when it comes to childhood religious involvement." For more information visit www.ellisonresearch.com.

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(e.g., company name) built into the text and modified via the wizard. Adding the user's corporate logo and selecting from a number of available design layouts personalizes the survey further. The process concludes when Vovici SurveyNOW provides the user with required elements to invite respondents to take the survey. For more information visit www.vovici.com/surveynow.

ESRI offers business segmentation tools

The new ArcGIS Business Analyst Segmentation Module from Redlands, Calif.-based ESRI integrates with ArcGIS Business Analyst desktop software, enabling organizations to generate specialized market segmentation reports by geographic area, such as zip codes and block groups.

With the Segmentation Module, organizations can identify the customer segments that promise the highest return on investment from marketing campaigns, allowing them to focus their marketing and merchandising strategies on these segments.

The foundation for the Segmentation Module is 2007 Community Tapestry data at the block group geography level and consumer survey data from Mediamark Research Inc. Doublebase 2005. Community Tapestry is a segmentation system that classifies U.S. residential neighborhoods into 65 distinctive segments based on their socioeconomic and demographic composition. It is based on a segmentation methodology devised by demographers, geographers and statisticians. This information is designed to provide insight into which consumer types would be most likely to buy certain products and services, enabling organizations to develop effective merchandising strategies that resonate with today's changing consumer tastes.

ArcGIS Business Analyst desktop software provides the GIS tools necessary for performing customer profiling, trade area analysis and business applications such as site evaluation and selection. Because the Segmentation Module integrates into ArcGIS Business Analyst, users can estimate product usages and market potential, perform competitive analyses and discover secondary markets for their products and services. The Segmentation Module makes it possible for market analysts to generate reports and maps based on segmentation data that is relevant, precise and accurate and to plan clear-cut, well-defined marketing strategies. For more information visit www.esri.com/basegmodule.

Product aids data processing for multi-wave surveys

Paris-based research software firm Askia has released askiasurf, a new product designed to help research companies and their clients with data processing tasks when working with trackers and other multi-wave surveys. Instead of reprocessing continuous survey data each time, askiasurf allows users to define a "relational path," forming a direct link between raw data and the analysis and reporting stage. When analysis takes place, all the data are combined logically, rather than physically, which cuts out the traditional restructuring and reprocessing of data. For more information visit www.askia.com.

Simmons, KMR partner for media measurement

KMR North America and New York-based Simmons, which partnered previously by linking the KMR Compose Survey and Software Tool to the Simmons NCS study, have developed a new set of vehicle-specific channel platform drivers that link Compose to the Simmons Multi-Media Engagement Study.

Using proprietary surveys and analytical techniques the Compose planning platform incorporates consumer drivers in a software tool that allows users to quantify brand communication objectives and develop enhanced brand strategies. The current Compose Engagement Product contains 41 product categories, 33 channels and over 1,000 individual TV, magazine and online vehicles within the Compose integrated communications planning platform.

Compose demonstrates the context in which consumers relate to ads across platforms and for individual media vehicles while allowing the Compose user to then take into account how many consumer targets will be exposed to that ad. This approach to planning allows the user to overlay transactional data obtained from any TV, magazine or Internet audience measurement source and evaluate planning alternatives with either actual or projected audience estimates. For more information visit www.kmr-group.com.

ORC offers tools for customer relationship eval, generating PR buzz with surveys

Opinion Research Corporation (ORC), Princeton, N.J., has launched its Customer Experience Evaluation tool, an online survey process designed for small and mid-sized companies to assess the health of their customer relationships. The Customer Experience Evaluation tool provides real-time delivery of customer opinions on issues that can impact business revenue, profitability, competitive differentiation and market positioning.

ORC's Customer Experience Evaluation tool is designed to give businesses insight into customer perceptions on issues such as the company's image/reputation; the value of products/services relative to cost; ease of doing business with the company; quality; level of service; and competitive offerings. It can also help identify likely growth customers as well as indicate which may pose risks to existing revenue streams and profitability.

Separately, Opinion Research Corporation and public relations firm the Hastings Group have unveiled PR PLUS, a "PR-friendly survey in a box" service. PR PLUS is designed to help boost media coverage of sponsors' business issues, products and services. Intended primarily for corporations and organizations with limited or no dedicated PR resources, PR PLUS is also aimed at agencies, companies or trade associations that lack extensive experience with the design, delivery and promotion of media-targeted surveys. PR PLUS is available in two tiers: full-service and advisory service. Full-service includes survey concepting through post-news event follow-up. The narrower advisory service includes consulting on topics such as brainstorming ways to integrate a survey into a client's broader PR efforts or development of news release and related survey fact sheet. For more information visit www.opinionresearch.com.

Briefly

London researcher Toluna plc now allows its panel members to conduct their own research using polls, opinion reviews and debates. At www.toluna.com, members can create, share and report on the results of polls and opinion debates across any topic. Every poll or debate created by users is open to U.K. panelists to answer and each member can see a demographic report of the results. The polls can also be posted on users' own Web sites or blogs.

Advertising Ratings Company, Glendale, Calif., is now offering ACE (Advertising Creative Effectiveness) Scores, which rate advertising's creativity and effectiveness versus just how many people are watching. ACE Scores are designed to tell advertisers which spots are effective and which are not and why. For more information visit www.werateads.com.

BIGresearch, Columbus, Ohio, has released its BIG Dashboard, which utilizes consumer insights from BIGresearch's Consumer Intentions and Actions (CIA) Surveys. The data can be customized and trended over the last 36 months by specific retailers or consumer groups by choosing segments from a drop-down menu. Segments include: future purchase intentions (90-day) by merchandise category (20 categories); purchase intentions (next six months) - durable goods; store channel shares; and purchase deferrals. For more information visit www.bigresearch.com.

ComScore Marketer, a new interactive search intelligence service from Reston, Va. research firm comScore Inc., is designed to enable search marketers and Web site operators to benchmark their performance versus competitors and optimize the ROI from their search marketing efforts.

It can: identify high-performing search terms at a site and category level; analyze searchers and the use of search terms by demographic segment; and find out who is competing on search terms to identify prime affiliate marketing partners. For more information visit www.comscore.com.


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by Morris Wilburn, an associate research director with Milwaukee research firm **Market Probe**, was recently selected as a finalist in the National Best Books 2007 Awards sponsored by USAbooknews.com. The awards recognized 500 winners and finalists in over 140 categories covering print, audio books and courses, e-books and interactive CD-ROMs. Awards were presented for titles published in 2007 and late 2006.

G & S Research Inc., Indianapolis, received a 2007 Business Ethics Award from the Better Business Bureau of Central Indiana.

Research firm **Greenfield Online Inc**., Wilton, Conn., has been named to Deloitte's Technology Fast 50 Program for Connecticut, a ranking of the 50 fastest-growing technology, media, telecommunications and life sciences companies in the area by Deloitte & Touche USA LLP. Rankings are based on the percentage revenue growth over five years from 2002-2006.

Arbitron's Portable People Meter was selected as one of *Time* magazine's best inventions of 2007.

New accounts/projects

London research firm **SKOPOS Market Insight** has added Soccerex, a global convention and exhibition for the soccer business, as a client.

Montreal research firm **Groupe Voxco Inc.** has added two new clients in New Zealand. The Ministry of Social Development of New Zealand has purchased the firm's Virtual Call Center. And New Zealand research firm Consumer Link is using Voxco Command Center for its phone and Web surveys as well as its panel management needs.

The Nielsen Company, Schaumburg, Ill., has signed agreements with eight convenience store retailers including Circle K, Cumberland Farms, Murphy USA, Valero and Wilson Farms. Under the census agreements, Nielsen will provide consumer product goods manufacturers with access to weekly data and sales information for the convenience retailers' corporate stores, enabling manufacturers to analyze granular insights and implement plans at the store-level. The agreements represent a total of 7,400 stores in the U.S.

New companies/new divisions/relocations/expansions

Arbitron Inc., New York, announced that Red Zebra Broadcasting has signed a multi-year agreement that includes Portable People Meter ratings services when the service is introduced in Washington, D.C.

Separately, urban adult contemporary radio station KJLH-FM has signed a multi-year agreement for the Arbitron Portable People Meter ratings service in Los Angeles when the service is introduced in that market. And Liberman Broadcasting, a Spanish-language broadcaster, has signed a five-year contract for Portable People Meter radio ratings services. The agreement covers 16 Spanish-language radio stations in Dallas, Houston and Los Angeles.

Company earnings reports

In the third quarter ended September 30, 2007, Germany-based **GfK** exceeded the results achieved in the prior year. Organic sales growth in the first nine months of 2007 stood at 5.5 percent. Overall, sales rose by 4.2 percent to EUR 833.9 million. The development in sales at the GfK Group was adversely affected by negative currency effects in the amount of 1.9 percent. Adjusted operating income increased to EUR 102.5 million. At 12.3 percent, the margin came close to the prior year's high figure of 12.5 percent. There was a disproportionately high increase in EBIT of 7 percent to EUR 90.3 million. Consolidated total income rose by 12.7 percent to EUR 51.2 million. The cash flow from operating activity showed a year-on-year increase of 34.3 percent to EUR 111.9 million, already exceeding the figure for the whole of 2006.

Harris Interactive, Rochester, N.Y., released financial results for its first quarter of fiscal 2008, which ended September 30, 2007. Comparative results are for continuing operations only and exclude the firm's rent and recruit business, which was sold in August 2007.

Driven by contributions from recent acquisitions in Germany, Canada and Asia, fiscal first quarter revenue was up 17 percent. Consolidated pro forma organic revenue was up 4 percent, led by a 6 percent organic revenue increase in the United States.

Fiscal first-quarter operating income was $1.6 million, up 58 percent when compared with operating income of $1 million last year. Net income for the quarter was $1.1 million, or $0.02 per diluted share, up 23 percent when compared with the first quarter of fiscal 2007.

Bookings, including $6.2 million of bookings contributed by recent acquisitions, were $50.8 million, up 18 percent when compared with $42.9 million of bookings for the same period a year ago. Organic bookings grew 4 percent in the quarter.

Paris-based **Ipsos** reported revenues for the first nine months of 2007 of EUR 664.2 million. That figure reflects: organic growth of 9.2 percent in the first nine months and 7.5 percent in the third quarter; a consolidation effect of 2.5 percent; and a negative currency effect of 3.4 percent due to the decline in the U.S. dollar and other currencies against the euro.

The Nielsen Company B.V. announced its financial results for the third quarter and the nine months ended September 30, 2007. Reported revenues for the third quarter were $1,188 million, an increase of 11 percent over revenues for third quarter 2006 of $1,070 million. Excluding the impact of currency fluctuations, and the deferred revenue adjustment in 2006, third-quarter revenues increased 7 percent. Reported revenues for the nine months ended September 30, 2007 were $3,429 million, up 11 percent over the pro forma revenues for the nine months ended September 30, 2006 of $3,089 million. Excluding the impact of currency fluctuations, and the deferred revenue adjustment in 2006, revenues for the nine months increased 6 percent.

Reported operating income for the third quarter of 2007 was $77 million compared to pro forma operating income of $90 million in the third quarter 2006. The third-quarter 2007 results were negatively impacted by $79 million in restructuring costs. The third-quarter 2006 pro forma results were impacted by $43 million in compensation agreements and recruiting expenses for certain corporate executives, and $11 million from the deferred revenue adjustment.

For the first nine months of 2007 reported operating income was $233 million compared to pro forma operating income for the first nine months of 2006 of $196 million. The nine-month 2007 results were negatively impacted by $134 million in restructuring charges and $16 million in connection with compensation agreements and recruiting expenses for certain corporate executives. The nine-month pro forma 2006 operating income of $196 million was impacted by $74 million from the deferred revenue adjustment and $43 million in compensation agreements and recruiting expenses for certain corporate executives.

For the quarter and nine months ended September 30, 2007, Chicago-based **SPSS Inc.** reported record third-quarter revenues of $72.3 million, a 12 percent increase from $64.7 million in the third quarter of 2006. New license revenues were $34.5 million, up 15 percent from $30 million in the third quarter of 2006. Operating income increased 29 percent to $12.5 million, or 17 percent of total revenues, from $9.6 million, or 15 percent of total revenues, in the third quarter of 2006. Reported operating income for the third quarter of 2007 includes $1.2 million in charges related to previously announced R&D facility closures and consolidation.

Diluted earnings per share (EPS) in the 2007 third quarter were a record $0.41, compared to $0.28 for the same period last year. These results included charges for share-based compensation of $1 million and $1.9 million in the third quarter of 2007 and 2006, respectively.

Revenues for the nine months ended September 30, 2007 totaled $211.4 million, an 11 percent increase from $190.4 million in the same period last year. New license revenues were $101.8 million, up 14 percent from $89.2 million in the 2006 nine-month period. Operating income increased 54 percent to $34.8 million, or 16 percent of total revenues, from $22.6 million, or 12 percent of total revenues, for the same period in 2006. Operating income in 2007 includes charges of $1.9 million for restructuring and R&D facility closures. Charges for share-based compensation were $5.5 million and $5 million in the first nine months of 2007 and 2006, respectively. EPS for the 2007 nine-month period was $1.16, compared to $0.63 for the same period in 2006. The effective income tax rate for the 2007 nine-month period was 39 percent, compared with a 37 percent effective tax rate in the same period last year.

Cash at September 30, 2007 was $297.1 million, up from $140.2 million on December 31, 2006. Cash flow from operations for the nine months ended September 30, 2007 totaled $51.5 million compared with $26 million for the same period last year.

At Wilton, Conn.-based **Greenfield Online Inc.**, financial results for the third quarter ended September 30, 2007 showed total net revenue of $32.3 million for the third quarter of 2007 as compared with $24.9 million for the same period in the prior year for an increase of $7.4 million or 29.9 percent of which approximately $1 million or 4.2 percent was due to currency effects.

For the Internet survey solutions segments, total third-party net revenue was $24.1 million for the third quarter of 2007, as compared with $19.8 million for the same period in the prior year for an increase of 22 percent.

For the comparison shopping segment, total third-party net revenue was $8.2 million for the third quarter of 2007, as compared with $5.1 million for the same period in the prior year for an increase of 60.7 percent.

Total gross profit was $23.7 million or 73.3 percent of revenues for the third quarter of 2007, as compared with $18.9 million or 76 percent of revenues for the same period in the prior year and $22.6 million or 73.2 percent of revenues for the second quarter of 2007.

Operating income was $4.7 million for the third quarter of 2007 or 14.5 percent of revenue, as compared to operating income of $2.5 million or 10 percent of revenues for the same period in the prior year.

Net income for the third quarter of 2007 was $3.3 million as compared with net income of $1.8 million for the same period in the prior year.

Net cash flow provided by operating activities was $3.4 million for the third quarter of 2007 as compared to $5.8 million for the same period in the prior year.

For the third quarter of 2007, non-GAAP adjusted EBITDA was $8.5 million or 26.3 percent of revenue, as compared to non-GAAP adjusted EBITDA, excluding restructuring and one-time charges, of $6.7 million, or 27.1 percent of revenue for the same period in the prior year.

In results for the third quarter ended September 30, 2007, **National Research Corporation**, Lincoln, Neb., reported a quarterly revenue increase of 5 percent; a quarterly net income increase of 7 percent; quarterly diluted earnings per share of $0.36; and quarterly net new contracts of $2.5 million.

Revenue for the quarter was $14 million, compared to $13.3 million for the same period in 2006. Net income for the quarter was $2.5 million, or $0.36 per basic and diluted earnings per share, compared with net income of $2.3 million, or $0.34 per basic and diluted earnings per share, in the prior year period.

Revenue for the nine months ended September 30, 2007, increased 14 percent to $38.1 million, compared to $33.5 million for the same period in 2006. Net income for the nine months ended September 30, 2007, increased 17 percent to $5.7 million, resulting in $0.84 per basic and $0.82 per diluted earnings per share, up 18 percent and 17 percent, respectively, over the same period in 2006.

Keynote Systems, San Mateo, Calif., announced financial results for its fiscal fourth quarter and year-end ended September 30, 2007. Revenue for the fourth quarter of fiscal year 2007 was $17.8 million, a 3 percent increase compared to the preceding quarter and a 17 percent increase compared to the fourth quarter of fiscal year 2006. Net loss for the fourth quarter of fiscal year 2007, which included a $2.8 million charge for deferred tax asset adjustment, $1 million in stock-based compensation expenses, and a $717,000 charge for amortization of intangible assets required under generally accepted accounting principles (GAAP), was $3.5 million, or $0.19 per share. This compared to net loss of $1.5 million, or ($0.09) per share, for the preceding quarter, and net loss of $6 million, or ($0.35) per share, for the fourth quarter a year ago.

The non-GAAP net income for the quarter was $2.2 million, or $0.11 per diluted share, compared to non-GAAP net income of $1.3 million, or $0.07 per diluted share, for the preceding quarter, and non-GAAP net loss of $797,000, or $0.05 per share, for the fourth quarter a year ago. The company defines non-GAAP net income or loss as net income or loss adjusted for provision for income tax, stock-based compensation expense, and amortization of purchased intangibles less cash tax expense. Non-GAAP net income per share equals non-GAAP net income divided by the weighted diluted share count as of the period end. Non-GAAP net loss per share equals non-GAAP net loss divided by the weighted basic share count as of the period end.

Revenue for fiscal year 2007 was $67.8 million, a 22 percent increase compared to revenue of $55.5 million for fiscal year 2006. Net loss for fiscal year 2007 was $4.7 million, or $0.27 per share, which included a $2.8 million charge for deferred tax asset adjustment, $4.1 million in stock-based compensation expenses and a $2.9 million charge for the amortization of intangible assets. This compares to net loss of $7.5 million, or $0.41 per share, for fiscal year 2006, which included a $3.9 million charge for the adjustment of the income tax benefit associated with the partial recognition of net deferred tax assets, $3.7 million in stock-based compensation expenses, a $2.4 million charge for the amortization of intangible assets, and a $840,000 charge for in-process research and development associated with the SIGOS acquisition. The non-GAAP net income for the fiscal year 2007 was $5.4 million, or $0.28 per diluted share, compared to non-GAAP net income of $2 million, or $0.10 per diluted share, for the fiscal year 2006.

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Mystery Shopping

Providers Directory >>>

This directory was compiled by sending listing forms to companies that have advertised a specialization in mystery shopping. We list over 300 firms. In addition to the company's vital information, we've included a cross-index section of the type of mystery shopping services they offer (audio record shops, competitor shops, etc.). We have also provided an expanded geographic cross-index to help you find a provider in a specific region. Want even more expanded search options? Use the online version of this directory at www.quirks.com.

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SG Marketing Group
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The Shadow Shopper of Georgia, Inc.
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Shop'n Chek USA
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Shop'n Chek Argentina
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www.shopnchek.com.ar
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Shop'n Chek Australia
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Shop'n Chek Canada
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www.shopnchek.ca
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Shop'n Chek Chile
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Shop'n Chek Japan
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Mike McCaffrey, National Sales Director

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the service, discussion threads, glossary terms, recent job postings and related associations and events.

• And, our supplier directories now boast a number of enhanced search features, making it easier than ever to find the ideal vendor for your project among our database of over 7,000 company listings.

Best of all, these features, and many more, are free of charge to subscribers.

Added an issue

On the print magazine side, we have made a number of changes for the coming year. We have added a 12th issue, splitting up the previous July/August issue into separate editions. We have also added several new editorial topics to the calendar: January - packaging research; February - ethnographic research; March - utilities industry research; May - naming research; July - financial services research; August - research education, training and employment; October - automotive research; December - sensory research.

As always, we welcome article submissions from outside sources, so if you would like to submit an article on any of the above topics (or anything else related to marketing research, for that matter!) feel free to contact me at joe@quirks.com.

Later this spring we hope to have an e-newsletter launched. We have also increased our advertising sales force and added two new editorial staff members.

Serve the industry

All of this growth is aimed at improving our products and services and will, we hope, position us to better serve the marketing research industry, both on the client side and on the vendor side. But rest assured, our expansion won't change who we are. We'll still continue delivering the same personal service and small-company attention that readers and advertisers have told us they find so welcome and valuable.

It's an exciting time in the marketing research field and we are proud and happy to be enhancing our offerings to keep pace with the profession's needs. I welcome any input you may have on our new features, so don't hesitate to drop me a line with your thoughts or suggestions. | Q

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trade talk

By Joseph Rydholm
Quirk's editor

Our big plans for 2008

Happy New Year! We are excited here at *Quirk's* to be ringing in 2008, as we have a lot of plans for the coming year.

Before I get to them, I need to spend a few moments talking about the changes we've made over the past several months at quirks.com. Up to and after the site's relaunch last April, our Webmeister Dan Quirk has worked hard to add new features and capabilities, in addition to freshening up the site's appearance.

• Subscribers can now access more than 2,000 past articles online, along with articles from the current issue. And, it's easier than ever to print, e-mail and bookmark articles.

• Our online glossary has doubled in size and now holds over 1,300 terms.

• The online events calendar is more comprehensive and is now searchable by topic.

• Our popular job postings section has new search features, including the ability to search by country, state and metro area.

• We've also added a Hot Topics section on the site. By clicking on one of the hot topics (such as ethnographic research or online research) site users can see, at a glance, a wealth of information on the subject, including abstracts of past articles, suppliers who offer

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