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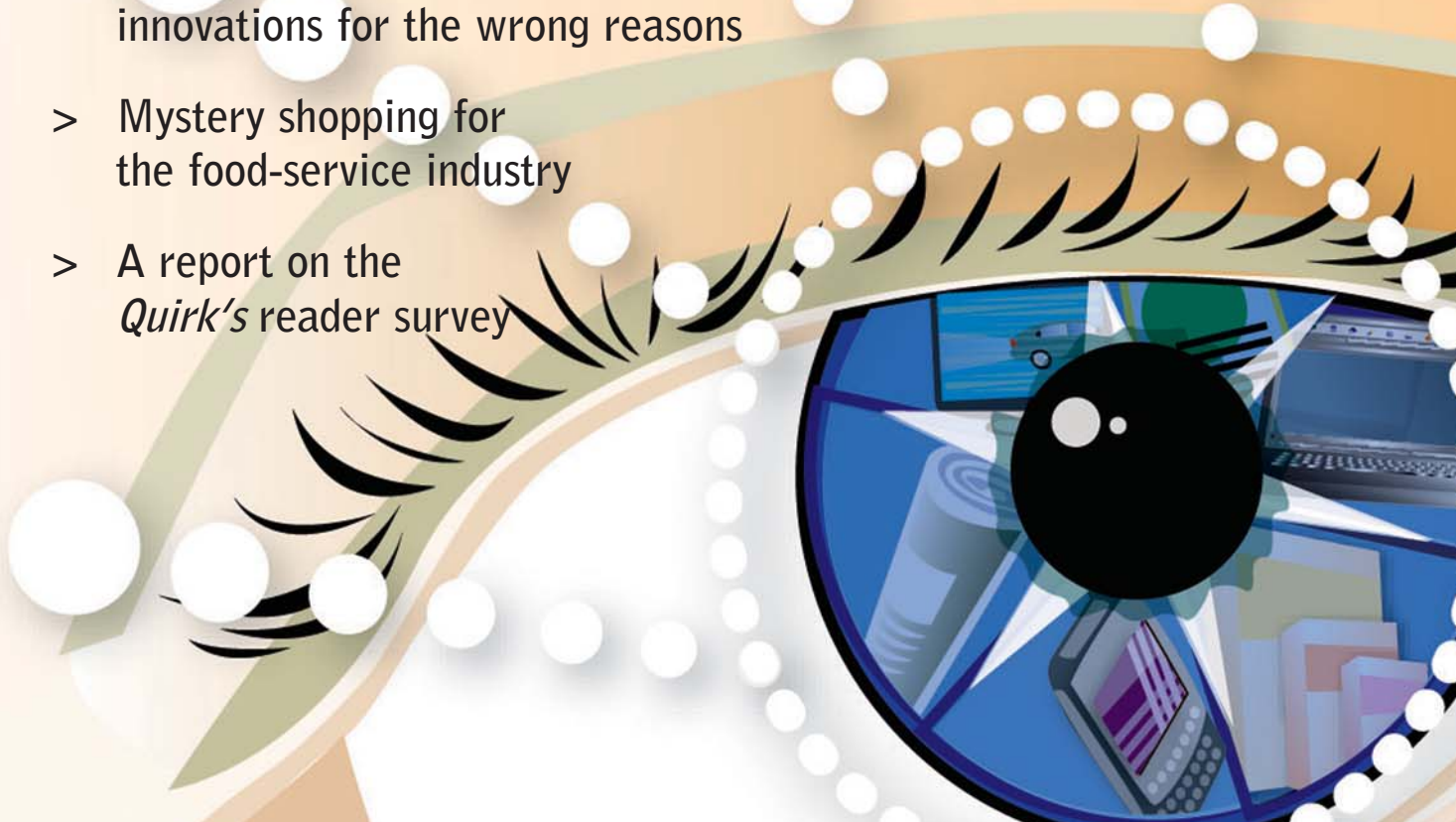
Marketing Research Review

JANUARY 2009

Principles for interpreting eye-tracking data

Also...

- > Why packaging has the hardest job of all
- > Don't create product innovations for the wrong reasons
- > Mystery shopping for the food-service industry
- > A report on the *Quirk's* reader survey



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contents

techniques

- 26 **Beyond the heat map**
Principles for interpreting eye-tracking data
By Mike Bartels
- 34 **Thanks for asking**
Feedback portals can engender customer goodwill, satisfaction
By Vivek Bhaskaran
- 40 **Love for sale**
10 ways to keep your panel respondents happy
By Nate Hardy
- 44 **Entertain me!**
Should an online interview be fun?
By Stefan Althoff and Bill MacElroy
- 50 **The hardest job of all**
Your product's packaging must close the sale
By Charles Young
- 60 **Whose need is it anyway?**
Make sure your product innovations serve consumer interests, not corporate ones
By Barb Gasper

- 66 **Get your restaurant's data to-go**
Mystery shopping for the food-service industry
By David Agius

columns

- 16 **By the Numbers**
Sample quality: selecting one from many
By Stephen J. Hellebusch
- 20 **Qualitatively Speaking**
Technophobia in qualitative research
By John Owen
- 82 **Trade Talk**
Reader survey shows strong relationship
By Joseph Rydholm

departments

- 6 In Case You Missed It...
- 8 Survey Monitor
- 10 Names of Note
- 12 Product and Service Update
- 14 Research Industry News
- 14 Calendar of Events
- 80 Index of Advertisers
- 81 Classified Ads

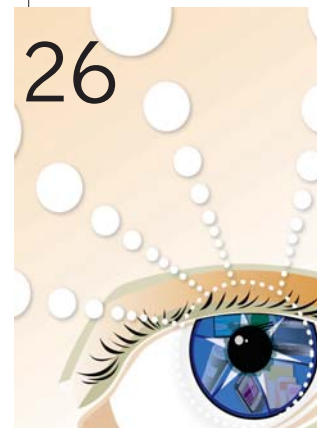


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in case you missed it...

news and notes on marketing and research



Reckitt breaks convention - and comes out on top

Some of the biggest names in packaged-goods have been outshined in the past five years in sales and profit growth by a smaller company with a lesser-known name. As reported by *AdAge's* Jack Neff ("How Reckitt Routed Rivals,"), unheralded Reckitt Benckiser has been beating the likes of its European neighbor L'Oreal, its Anglo-Dutch big brother Unilever and Cincinnati-based industry juggernaut Procter & Gamble Co. (P&G) on the top and bottom lines of late. And although Reckitt's 17 "power brands," including Lysol, Airwick, Finish, Mucinex, Veet and French's mustard, may be growing, they're a far cry from competitors' multibillion-dollar offerings.

So what's the strategy? In an industry where big competitors have been moving toward lower attrition rates and longer job tenures, Reckitt embraces its fluid and polyglot talent. It draws the 400 employees based in its U.S. headquarters from 30 countries. And it encourages even junior executives to switch countries and roles frequently to help foster an entrepreneurial mindset. It's a flatter and less-hierarchical organization than many, where promotion comes based on merit, with no preset tenure required and an expectation of a transfer six to eight months after mastering a job.

Other lessons companies can learn from Reckitt Benckiser include:

TV advertising works - at least for now. Reckitt keeps spending more on advertising, particularly TV, and it keeps posting strong top-line growth.

Conflict beats forced consensus. "In that friction, one of those sparks that flies out will be a richer idea," said Alexander Lacik, general manager, marketing, North American household products.

Role reversal helps. Reckitt executives cycle often between global roles with three-year-plus horizons and short-term, profit-and-loss-driven regional assignments, so they understand the people and purpose on both sides.

Recession doesn't have to be a deal breaker. Through a substantial economic and industry downturn, Reckitt has raised spending, accelerated sales and gained share.

Looking for a church? Let the mystery worshipper guide you.

Department stores hire mystery shoppers. Restaurant chains bring in undercover diners to rate their food and service. Churches have begun following suit and showing an affinity for modern marketing research practices by enlisting mystery worshippers, according to Alexandra Alter's October 10, 2008, article "The Mystery Worshipper," in *The Wall Street Journal*.

Mystery worshippers pose as first-time churchgoers to evaluate everything from the cleanliness of the bathrooms to the strength of the sermon. One particular church's laundry list of imperfections included: a water stain on the ceiling, a "stuffy odor" in the children's area, a stray plastic bucket under the bathroom sink and a sullen greeter who failed to say good morning before the worship service.

Pastors say mystery worshippers offer insight into how newcomers judge churches. In an increasingly diverse and fluid religious landscape, churches competing for souls are turning to corporate marketing strategies such as focus groups, customer satisfaction surveys and product giveaways. Church leaders say they're seeking new ways to assess their services and evaluate everything from the style of music to how comfortable the pews are as they court fickle churchgoers.

At least half a dozen consulting companies have introduced secret-church-shopper services in recent years. Churches have shown up eager and willing to pay top dollar for blunt advice on how they can improve both the size of their congregations and their offerings. The cost of mystery worshipping services can range from around \$150 for a one-time visit to \$1,500-\$2,500 for multiple visits and a detailed report.

The rise of these services has been bolstered by the growth of the secret-shopper industry. So far, secret-shopper services mainly target Christian churches, where declining brand loyalty among worshippers has become an all-too-common occurrence. A 2008 survey by the Pew Forum on Religion and Public Life, which drew from interviews with more than 35,000 people, found that 44 percent of American adults have switched religious affiliations.

Some theologians warn that mystery-worshipper services will drive "spiritual consumerism." Evaluating churches as if they were restaurants or hotels could encourage people to choose their church not according to its theology, but based on which one has the best lattes or day care, said Paul Metzger, professor of theology at Multnomah Biblical Seminary in Portland, Ore. Others say that church shopping has become necessary for churches seeking to compete in an increasingly mobile and consumer-oriented society.

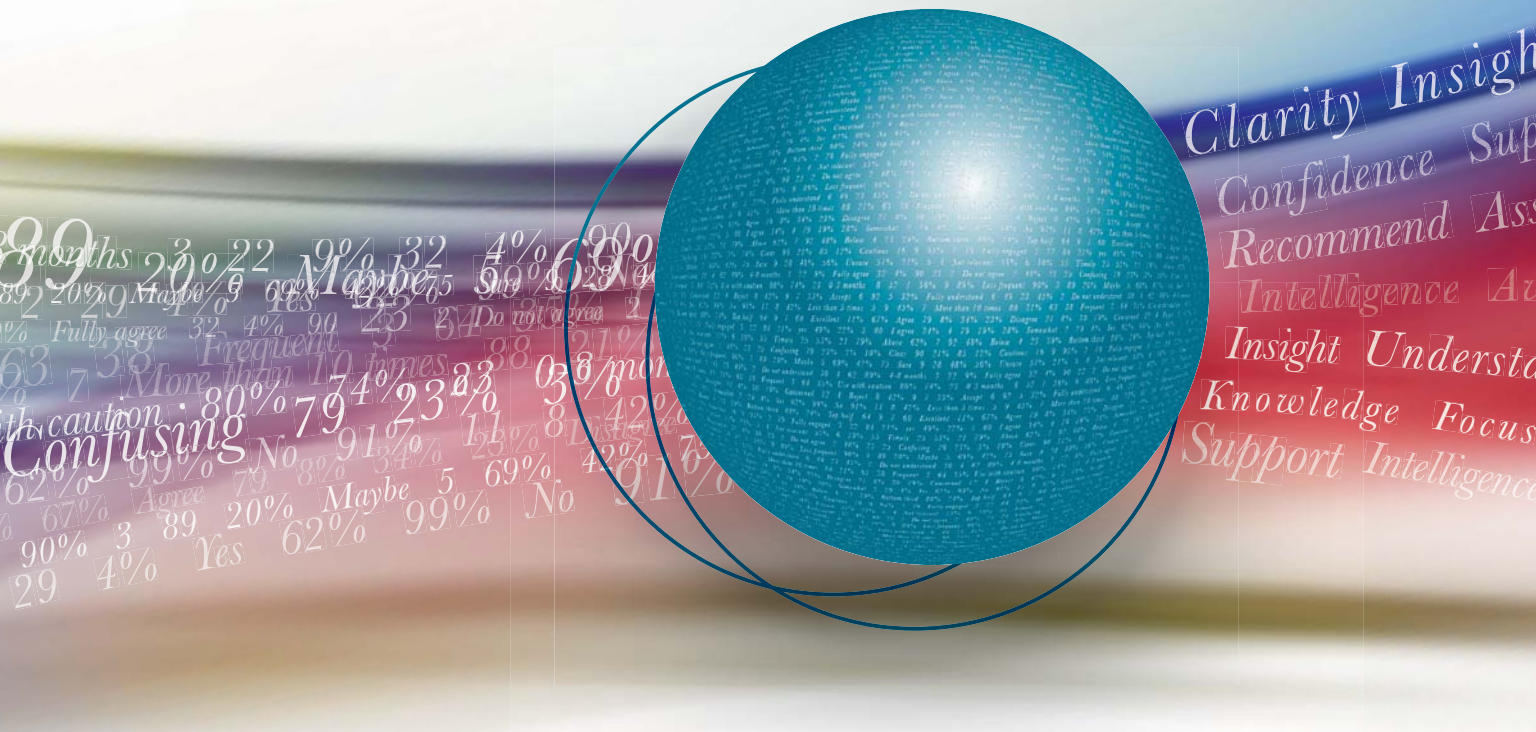
Families that tech together, stay together

In addition to having 1.34 children, a dog and a white picket fence, the American nuclear family is also more likely to have cell phones, computers and a broadband connection compared to other not-married-with-children households, according to Pew Internet & American Life Project, a report by Pew Research Center, Washington, D.C.

Over 90 percent of married-with-children households have at least one cell phone, in addition to one computer, compared to 84 percent of all adults owning one cell phone, and 77 percent owning one computer. Fifty-eight percent of these nuclear families have two or more desktop or laptop computers, and 89 percent own multiple cell phones (47 percent own three or more).

While some fear that technology is ruining families, the survey found that couples use their phones to connect and coordinate their lives, especially if they have children at home. Spouses, parents and kids all manage to stay connected by cell phones and the Internet during the day when they are separated and are more likely to share moments with other family members online. At least a quarter of survey respondents said that their families today feel closer than their families when they were growing up, thanks to the Internet and cell phones. Sixty percent said that new technology has not affected family closeness.

Dallas telephone service provider AT&T also released survey results indicating that families are using SMS to communicate with each other more than ever before. Seventy-six percent of parents felt that their children were more likely to keep them abreast of their activities through text messaging, while 73 percent of parents said that their kids were more likely to respond to a text compared to other communication methods. Spouses and romantic partners were also found to be texting more, with 68 percent using SMS to send love notes to each other.



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Gen Y turns to the Web with medical questions

Think it's only Baby Boomers visiting health and wellness resources online? Over 50 percent of young people ages 13–24 are accessing health and wellness information on the Internet. Youth are also using confessional sites and posting anonymously on message boards to get personal advice more often than traditional support services such as phone hotlines, according to a national survey conducted by Ypulse, a Chicago research company;



YouthNoise, a San Francisco young-leader support organization; Internet Sexuality Information Services Inc. (ISIS), an Oakland, Calif., nonprofit; and Peanut Labs, a San Francisco research company.

“Youth have always gotten information about sensitive and personal health issues from their peers,” says Deb Levine, executive director, ISIS. “What’s changed today is that they’re communicating with their peers online within their social networks.”

WebMD was cited by 15 percent of respondents, making it the most popular site among young people who say they use the Web for information about health and wellness.

More young people, in fact, refer directly to WebMD rather than use search engines to research health and wellness issues. Of the 17 percent of respondents who reported visiting online confessional sites or message boards to share personal information, 87 percent considered the experience a positive one.

Across the board, respondents cited STDs/HIV and drugs/substance abuse as their top health concerns, while issues related to the Internet, such as cyber-bullying, ranked low on their list of concerns.

Asked what they would want from a health and wellness-related Web site, young respondents said “both accurate, accessible information and a community where users can interact and obtain personal support from both peers and professionals.” Being fun and interactive, safe and anonymous are also qualities that young people are looking for in a good information site, according to the survey results. For more information visit www.isis-inc.org.

Mobile marketing recipients want personalized promotions

Mobile/SMS marketing recall rates are high compared to other forms of media, according to The 2008 Mobile Response Survey, sponsored by HipCricket, a Kirkland, Wash., mobile marketing company. Of the respondents who received mobile marketing messages within the past year, more than half recalled at least one brand. Further, 96 percent remembered the promotion’s call-to-action, and more than one-third reported that the promotion made them more likely to buy the brand’s product or service. Thirty-seven percent told a friend about the message, and 6 percent forwarded the promotion to a friend.

The survey also found that 58 percent of consumers are interested in receiving mobile coupons and

nearly 40 percent would be willing to receive location-based, time-related offers and coupons (e.g., a pizza coupon during the commute home from work). Forty-seven percent of those surveyed said if they received a mobile coupon it would be likely or very likely that they’d redeem it, with 70 percent of those respondents expressing interest in redeeming mobile coupons both online and in-store.

Consumers said they would also use their mobile phone to locate a store or restaurant (39 percent), enter a contest (28 percent), download a ringtone or wallpaper (27 percent), visit a mobile Web site (20 percent), sign up to receive future offers and promotions (14 percent) and view nutritional facts while at a restaurant (13 percent). More than half of respondents never access the mobile Web, and only 5 percent would use their phone to click on a mobile ad.

Consumers are most interested in receiving messages on their mobile phones regarding food and beverage (51 percent), entertainment and media (40 percent), retail (24 percent), apparel (23 percent) and mobile carriers (21 percent). For more information visit www.hipcricket.com.

Video gaming culture moves out of the basement

While video gaming has in the past been stereotyped as a solitary activity, statistics point to the fact that video gamers are now more likely than non-gamers to play sports, attend a concert or even go out on a date. In addition, video game players may be evolving into a surprisingly diverse crowd, with the average age of gamers now topping 30 and more than half of gamers married with kids, according to research from IGN Entertainment, a Brisbane, Calif., media company, and Ipsos MediaCT, a division of Paris-based research

continued on p. 70

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names of note

Trenton Summer Haack died unexpectedly at age 36 in October 2008. Haack served as the director of qualitative services at Cincinnati research company *Burke, Inc.*

Raymond Hong-Shin Suh, president of Atlanta research company *Ray Suh & Associates*, died at age 64 of cancer in November 2008.

Dulles, Va., research company *Vovici* has promoted **Eileen Townsend** to vice president, global customer management.

Chicago research company *Synovate* has hired **Klaus Friis Mikkelsen** as managing director for Denmark, based in Copenhagen. Separately, Synovate has named **Gordon Milne** executive director, qualitative research, based in South Asia. Additionally, Synovate has expanded its Indian operation and has appointed **Annie Kurien** as research director, **Himanshu Verma** as associate director, **Kavita Gupta** as senior project director and **Nandita Das** as project director.

Cincinnati research company *Burke, Inc.* has promoted **Tom Myers** to senior vice president, client services management, and **Diane Surette** to executive vice president and head of client services.

Louise McLaughlin has joined *Lightspeed Research*, Basking Ridge, N.J., as a project manager in its London office. **Francesca Boldi** has also joined Lightspeed's London office as a panel relations associate.

Abt Associates, a Cambridge, Mass., research company, has hired **Kim Fletcher** and **Ron Davison** to

lead its global emergency management services practice.

Vancouver, B.C., research company *Angus Reid Strategies* has named **Patrick Klein** senior vice president of its health care practice.



Rossol

Josh Rossol has joined New York research company *Ziment* as chief methodologist.

New York researcher *The Nielsen Company* has promoted **Susan D. Whiting** to vice chairperson and appointed **Rebecca Chiu** as director, consumer research, based in Hong Kong.

London research company *MindShare* has promoted **Melanie Jones** to CFO of Mindshare North America, based in New York.

Kimberly Till has been named president and CEO of Rochester, N.Y., research company *Harris Interactive*. Separately, Harris Interactive has hired **Kathy Dykeman** as director, business development, for its U.K. team.

London research company *SPA* has hired **Parveen Bdesha** as research director, sponsorship research; **Catherine Ellis** as associate director; **Janet Wright** as research director, sector specialism; and **Claire Gallagher**, **Emma Finlay** and **Amy Zhong** as research executives.

FreshMinds Research, London, has

named **Alistair Leathwood** managing director.

Lux Research, New York, has appointed **Don Best** as managing director.

Tonya Parsons has joined *Mindwave Research*, Austin, Texas, as vice president.

Synergy Research Group, Reno, Nev., has hired **Ken Landoline**, **Sam Masud** and **David Dines** as vice president, research.

Global Market Insite, a Seattle research company, has hired **Luis J. Salazar** as CMO.

Roger Sant has joined *Maritz Inc.*, a St. Louis research company, as divisional vice president, brand research, Europe.

Evo Research, London, has appointed **Toby Newall** as head of U.K. qualitative research.

Vernon Research Group, Cedar Rapids, Iowa, has named **Jennifer Schaefer** research coordinator and **Robyn Demuth** research analyst.

Gary Morin has joined Omaha, Neb., research company *infoGroup* as an independent director.

Stamford, Conn., research company *InsightExpress* has expanded its custom marketing research team. **Frank Dolcimascolo** has been hired as a director, media sector; **Jeffrey Price** as an account executive, service and leisure sector; and **Michele Paris** as an account manager, service and leisure sector.

Tonya Deniz has joined *The Advertising Research Foundation*, New York, as senior vice president,

continued on p. 79

Kellogg's Goes Virtual To Test Real Life Packaging

A package has to break through clutter on the shelf, communicate the product's key messaging, and, above all else, persuade shoppers to buy.



“In our Smart Start test, we got the validation that it does work. The correlation with our actual sales data was fantastic. Our brand and sales teams have embraced it. This is a methodology that our management trusts.”

– Brian Seel, Associate Manager Marketing Research, Kellogg Co.

CPG companies spend millions on advertising, PR, websites, and many other marketing levers – and these investments are critical. But, research consistently demonstrates that MOST of the purchase decision is made at the shelf. Given that, it could be argued that a product's packaging is the most important marketing vehicle in the mix!

As more companies continue to invest in packaging as a key marketing lever, there is also more research applied to identifying the best packaging. But,

Kellogg Company found that most research techniques were focusing on the wrong measures.

“Packaging is not simply important, but crucial,” said Brian Seel, associate manager of market research for Kellogg Company. “With three or four potential new packages, you need a way to truly understand how each is working, or not working, in the context of the entire product. The goal is ultimately to get to a better package tomorrow than what you have today. It isn't just about getting a thumbs-up or a thumbs-down on potential options.”

“We were facing a lot of challenges on the brand and given those challenges, the package seemed a logical place to start working towards a solution,” he said. Designers developed three new alternative versions of a package that aimed to stand out more on the shelf, present a warmer feel, and generate more trial.

Kellogg's opted not to rely on traditional methods of research that essentially involve side-by-side comparisons of packages, “what-if” changes in design, eye-tracking, and in-market testing. Instead, it turned to testing using a *virtual shopping platform from Decision Insight* for a more efficient and less costly form of research that still gathers the impressions of actual consumers.

The research emphasis changed from what package consumers liked to a system measuring sales first followed by shelf presence, effects on brand equity and finally aesthetic appeal. By measuring shopping behavior in the context of a virtual supermarket, product manufacturers can test options at the shelf.

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product and service update

SPSS debuts advancement in predictive dialing

SPSS Inc., a Chicago research company, has launched SPSS mrDialer 4.0 with Voice Over Internet Protocol (VoIP), a product designed to deliver faster completion of projects, lower staff costs and give market researchers more control over survey projects.

Since VoIP uses broadband connections instead of analog phone lines, SPSS mrDialer 4.0 is intended to support virtual call centers where interviewers are dispersed over a wide geographical space, either in separate offices or working from their homes. MrDialer 4.0 is designed to allow market researchers to centralize control of the call center, operate around the clock and scale resources without significant cost escalation.

SPSS mrDialer uses predictive dialing algorithms to identify busy, unanswered or unobtainable numbers. It is also designed to be adaptable to new rules and dialing methodologies that can be updated with a graphical user interface.

SPSS mrDialer 4.0 is designed to offer market researchers the ability to record interviews for quality assurance and capture responses; analyze busy signals and unanswered, modem and fax calls; prioritize recalls to meet a pre-set appointment time; simultaneously run multiple interviewing projects; deliver real-time reporting of numbers dialed and attempted, along with completed interviews; and monitor the interview screen and voices from any station. For more information visit www.spss.com/mrdialer.

TNS launches digital ad effectiveness tools

New York research company TNS has introduced a new generation of online advertising monitoring tools. TNS Digital Suite combines cookie-tracking technology with TNS's 6th Dimension Panel to ana-

lyze online ad consumption.

TNS Digital Suite provides updates and features designed to aid the program's panel-centric approach to online ad monitoring, including the following: no more pop-up surveys; control for cookie deletion; capturing ad exposure on multiple computers (home, work or school) for each panelist; ad effectiveness measures for the target audience using the 6th Dimension panelist profiles; analysis through longer surveys (up to 30 minutes long against 7-8 minutes); surveys taken at the convenience of the panelist instead of the current proximate surveys which occur immediately after ad exposure; and analysis available based on frequency and time since last exposure. For more information visit www.tnsglobal.com.

MRSI announces two new offerings

Marketing Research Services Inc. (MRSI), Cincinnati, has launched mrExpress, an online research service designed to provide answers to business questions in less than 24 hours at a cost lower than that of traditional custom research. MrExpress is designed to allow clients to ask up to 20 closed-end questions among a representative sample of 300 consumers. MRSI's Census Balancer technique is used with mrExpress to help produce demographically-representative online samples based on age, gender, geography, race, ethnicity and education.

MrExpress is designed to be used in applications including brand or ad awareness, incidence testing, usage or satisfaction, name/logo evaluation and tracking research. For more information visit www.mrsi.com/express.html.

In addition, MRSI has introduced a collection of shopper insights research services designed to help consumer product manufacturers and retailers connect with

shoppers throughout the purchase process from pre-store, to in-store, to point-of-purchase. MRSI's shopper insights research is also designed to help clients understand consumer/shopper behavior and motivation, determine optimal product assortment, maximize brand performance, enhance retail shopping experience, refine retail and promotion strategies and improve loyalty and customer retention. MRSI's shopper insights research services include ethnography, attitude and usage studies, segmentation, product testing with ProSelect, packaging research, product-line optimization, pricing, customer profiling, customer satisfaction research and Hispanic research with ENFOQUE. For more information visit www.mrsi.com/shopperinsights.html.

WebTrends' new framework to aid in data exchange

WebTrends Inc., a Portland, Ore., research company, has unveiled an open technology framework and standards-based solution designed to help exchange data, free from mass-market Web analytics suites. The WebTrends Connect framework is designed so that visitor-level online data can be exchanged with other standards-based systems. WebTrends data-exchange framework includes WebTrends Marketing Warehouse, designed to function as an open, standards-based hub for the analysis and storage of online and offline data; WebTrends Connect, designed to streamline the exchange of data into and out of WebTrends Marketing Warehouse and WebTrends Analytics; and a data scheduler, designed to provide self-service, direct access to the WebTrends Marketing Warehouse database. For more information visit www.webtrends.com.

continued on p. 74



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Our clients asked for an online research panel they could rely on to deliver quick, accurate results at a price that represents the best value in the industry. That's why we created Opinion Outpost. Our panel members are screened, scrubbed and altogether sheep dipped to ensure they're the best choice to give you answers to your online surveys. Our proprietary Bloodhound™ technology, used to sniff out duplicate respondents, is included FREE with Opinion Outpost bundled services. Our detailed profiles can help you zero in on even the most hard to reach demographics, including business and medical professionals. Our clients asked for it and they get what they want. Isn't it time you did too? Choose Opinion Outpost. Ewe will be glad you did.

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News notes

Gazelle Global Research Services, New York, has received national certification as a Women's Business Enterprise by the Women's Presidents' Educational Organization - New York, a regional certifying partner of the Women's Business Enterprise National Council. The certification process is designed to confirm the business is at least 51 percent-owned, -operated and -controlled by a woman or women.

Educational Research Center of America Inc. (ECRA), Morristown, N.J., has agreed to change how it collects and discloses students' personal information under a settlement reached with Illinois Attorney General Lisa Madigan and 36 other attorneys general. ECRA entered into the settlement based on allegations that it asked high school and junior high students for personal information such as their ethnic background, honors won and sports and extracurricular activity participation, but failed to clearly and conspicuously disclose opt-out procedures to those students and their parents, according to Madigan. ERCA also allegedly offered educators \$40 and \$50 gift cards from companies such as Staples, Visa and OfficeMax to encourage them to distribute surveys to students.

Under this settlement, ERCA is required to clearly disclose how students or parents of students under 18 can opt out of the survey. ERCA also will cease offering financial incentives to educators to distribute the survey to students. The company did not admit any violations of state consumer protection statutes, and it will pay \$200,000 to the state for investigative costs, attorney fees and consumer education and litigation.

New York research company **Arbitron Inc.** issued the following statement in response to the ruling by the United States District Court, Southern District of New York, regarding the case of Arbitron's Portable People Meter (PPM) audience

Calendar of Events January-May

The ARF will hold its 2009 ARF Industry Leader Forum, themed "Transform Your Research by Listening, West Coast Edition," on January 27 at Bently Reserve in San Francisco. For more information visit www.thearf.org/assets/forum-09.

The Council of American Survey Research Organizations will host a conference focused on panel research on February 2-3 at The InterContinental in New Orleans. For more information visit www.casro.org.

ESOMAR will hold its 2009 consumer insights conference, themed "The Pragmatic Approach," on February 9-11 in Dubai. For more information visit www.esomar.org.

CMOR will hold its annual respondent co-operation workshop on March 2-4 at the Miami Beach Resort and Spa in Miami Beach, Fla. For more information visit www.cmor.org.

The Pharmaceutical Marketing Research Group will hold its annual national conference on March 8-10 at the Wynn Hotel in Las Vegas. For more information visit www.pmr.org.

Research Magazine will hold its annual conference, devoted to inspiration, innovation and ideas, on March 24-25 at the Riverbank Park Plaza in London. For more information visit www.research-live.com/research2009.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on March 30-April 1 at the New York Marriott Marquis in Times Square. For more information visit www.thearf.org.

Photizo Group will hold its annual managed print services conference on April 26-28 at the Omni La Mansion del Rio in San Antonio. For more information visit www.managed-print-services.com/conference.htm.

The Business Intelligence Group will host its annual BIG Conference 2009, themed "B2B Research: New Dimensions," on May 13-15 at the Marriott St. Pierre in Chepstow, Wales. For more information visit www.bigconference.com.

The AAPOR will host its annual conference on May 14-17 at the Westin Diplomat Resort and Spa in Hollywood, Fla. For more information visit www.aapor.org.

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail Emily Goon at emily@quirks.com. For a more complete list of upcoming events visit www.quirks.com/events.

measurement system allegedly undercounting minorities:

"Today's ruling does not impact Arbitron's right to publish our Portable People Meter audience estimates in New York. We asked the federal court to protect our right to provide the radio industry with the up-to-date PPM audience estimates it needs. Following our efforts, the New York Attorney General chose not to seek a temporary restraining order adversely impacting our right to produce PPM estimates.

"Now that Arbitron has commercialized the PPM service in New York and other key markets, we look forward to defending our interests. Broadcasters, agencies and advertisers need continual PPM audience estimates if radio is to remain competi-

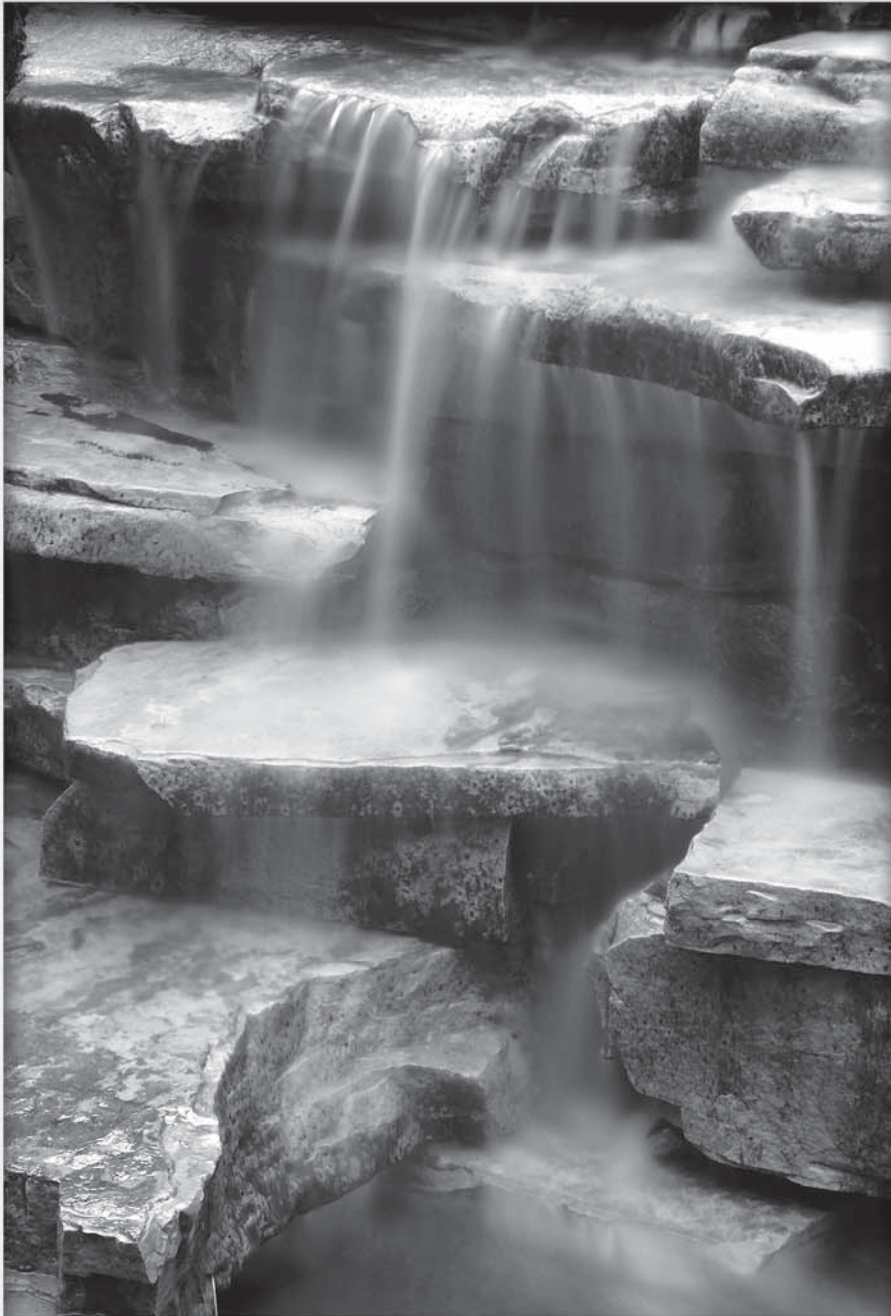
tive in an increasingly complex and crowded media marketplace."

Separately, Arbitron has adjusted the PPM commercialization schedule. Four markets - Kansas City, San Antonio, Salt Lake City and Las Vegas - are scheduled to commercialize with the December 2009 PPM survey report (November 12-December 9), slated for release on December 31, 2009. Previously, these four markets were slated to commercialize with the release of the March 2010 PPM survey report. The final diary-based audience survey in these four markets will be the Summer 2009 survey (June 25-September 16).

Five markets - Milwaukee; Charlotte, N.C.; Columbus, Ohio;

continued on p. 76

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The Fine Art of Marketing Research



Sample quality: selecting one from many

An article from the June 16, 2008, issue of *BusinessWeek* (“Online Polls: How Good Are They?”) reminded us about the importance of making sure that those we survey are representative of the population we are trying to investigate.

It reported: “Online polling offers some clear benefits. Because respondents can choose when to take the survey and how much time to devote to each question, they are more likely to provide thoughtful and candid answers. Companies can ask more sensitive questions (how often do you bathe?) because respondents aren’t being questioned by a human being ...

“But critics point to a central problem with many online surveys: the pools of respondents, though massive, rarely represent the larger population. That ... is because the respondents aren’t selected randomly, violating a core requirement of probability-based research.”

Selecting a truly representative sample is a difficult task, and one easy to overlook. Additionally, there is a learning curve, as much of the recent research concerning quality in online

interviewing indicates.

Oddly enough, it is actually rare that we get to see the impact of sample quality in marketing research, primarily because it is not an objective of any of the studies we conduct. A little while back, however, I had an experience that focused and sharpened the importance of this consideration for me. This short article shares that experience, with the names changed to protect the innocent (or the guilty).

The company had launched a new product, a fiber supplement in powder form which users mixed in water. Call it Powderine. It had a great flavor and mouth-feel as its key point of difference. To add some definition, let’s say Powderine’s flavor was chocolate.

About three years after a modestly successful launch, the brand group decided to add a well-researched alternative to the line. While people loved the chocolate, the new Powderine flavor was actually a non-flavor - it was neutral. The idea was that consumers would be able to mix the non-flavor with whatever liquid they desired, and “have it their way.” Since Powderine Neutral had the texture benefits of the original

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product, the target group was those using a competitor’s non-flavored version, which did not have the nice mouth-feel of Powderine.

The first sample

About five months after launch, the brand managers were concerned, because the customer information center (the toll-free line) was getting a lot of calls about the new line extension. To explore for any issues, we surveyed those who called in about it, most of whom had called to complain.

While the sample size was small (66), we learned that the users had a very unfavorable opinion of Powderine Neutral. About a fifth rated it “excellent” or “very good.” Relatively few (47 percent) indicated any intent to buy it again (“definitely” or “probably” would buy). When asked “likes” and “dislikes,” the

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number of comments categorized as dislikes dominated.

And then we had a very key learning. Most (80 percent) of those calling had come to the line extension from the original Powderine chocolate flavor, and many of them were mixing it in water – just like they did the original! It was designed to be tasteless in water, so their disappointment was not hard to understand.

The second sample

Those latter points made all of us wonder if the negative reaction was a result of the customer information center sample or due to a bad product. The brand group was especially anxious to learn if they had a product quality issue to address.

The category was very low-incidence, so it was hard to obtain a representative sample of Powderine Neutral users. Adding to the challenge was the fact that the product was a line extension, bearing the Powderine name, so even making sure the respondent was talking about the right product in the line was a challenge.

In the pre-Internet days, mailing

short “card” questionnaires to huge household panels was a very effective way of collecting representative samples of low-incidence respondents. So, we used that approach. We could not be certain from the card that the respondent correctly identified the line extension, but we interviewed all 100 respondents available, and ended up with 37 who were certain to be referring to the Powderine Neutral. The sample size was uncomfortably low, but it was the best that could be obtained six months after launch in a low-incidence category. The questionnaire was the same as the one used earlier, for comparison purposes.

What a difference the sample made! While less than half of the customer information center sample indicated they would buy again (47 percent), nearly three-fourths (72 percent) of this sample said they would. Nearly 90 percent of this small group liked the mixability and flavor, relative to other similar products. Like/dislike comments were overwhelmingly favorable. Most of the respondents had come to Powderine Neutral from

the competitive product, as intended, not from the brand’s chocolate flavor.

Stark difference

Although we may not wish it to be so, sample quality is still very important in conducting surveys. The stark difference in the results from these two very different samples with the same questionnaire makes that evident. The advent of online interviewing does not change the basics in conducting survey research – it just makes some things a lot easier. The sample has to represent the population you are projecting to, and the wise researcher will take steps and create quality-controls to help make certain that it does.

As a brief follow-up, Powderine Neutral eventually did fail in the marketplace. Presented as a flavorless alternative to a product famous for its great chocolate flavor, it never sufficiently caught on. But at least the brand managers had evidence that it was a hit with those it was aimed at, even though the marketing effort was unsuccessful in convincing enough of them to try it. | Q

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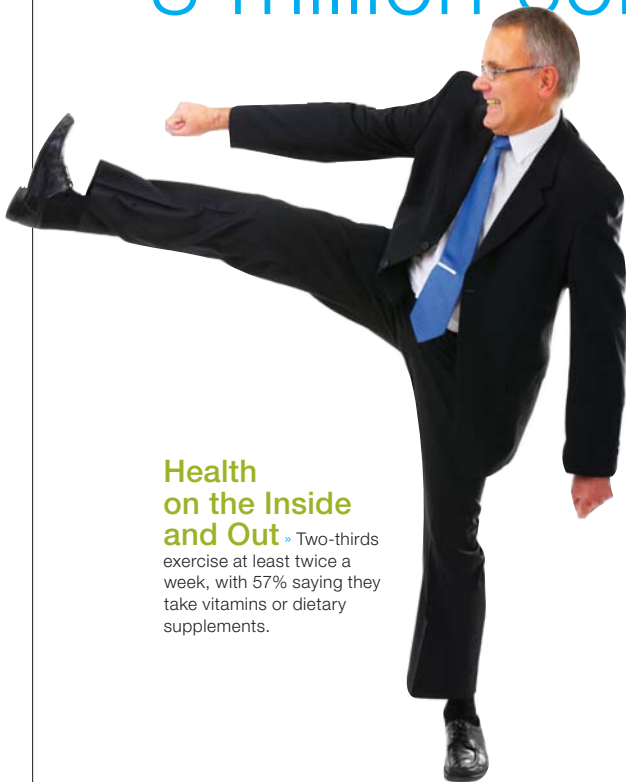


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Technophobia in qualitative research

In the world of research, the infiltration of technology has been greeted with mixed reviews. Many have embraced the new horizons that technology brings but others have taken a more skeptical view, choosing to continue working in more traditional methods. This difference is clearly evident when examining the tools of the trade. For example, while most quantitative researchers have welcomed the technological advancements, there is still a strong resistance to moving away from the long-established pen-and-paper approach within sections of the qualitative research field.

Qualitative research generates a large amount of raw material, usually in the form of text, but increasingly now in the form of audio, video and digital photos. Further, the Internet has allowed researchers to reach a rapidly expanding audience in a variety of differing environments, from blogs to social networks to online surveys. Traditionally, qualitative researchers have used manual methods to organize and manage this high volume of data and are faced with hours of sorting, highlighting, cutting and

pasting. This physical process seems to have implied a more human touch or connection by linking the researcher more directly to those being researched, which in some ways differentiates qualitative from quantitative researchers. It was not that long ago in the academic world that the idea of using software to analyze qualitative data was viewed as methodologically unsound and going against the important “closeness to data” by distancing the researcher from the source material. However, the main purpose of the computer is no longer one of literally computing numerical data. Instead, computers are used for manipulating all kinds of information, particularly multimedia material.

In general terms, academics have embraced software tools for use in all forms and disciplines of qualitative research. This is not the case in the commercial world, where researchers still generally rely on manual, paper-based methods or basic software workarounds in Microsoft Word or Excel to compile their research data.

The big question is why? Is this a case of widespread technophobia by

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the commercial research community or are there more mundane and logical reasons why large sheets of paper covered with notes and highlighter pen markings are still a common sight in researchers' offices?

Justify their method

Unlike the academic researcher, qualitative researchers in the commercial world are rarely called upon to justify their method of research and are employed because of their expertise to deliver the insight sought by their clients. Indeed, there could be a fear that the use of computers could damage their credibility in the art of interpreting qualitative data and dilute their ability to glean insight from vast quantities of information. In this instance, is the fear of technology the result of the researcher's beliefs or is there a resistance from the client to bringing technology to the forefront

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of qualitative research?

Regardless, there seems to be an important misunderstanding of the purpose of software that needs to be debated to ensure that qualitative research does not fall behind its quantitative counterpart. In considering the question of using a computer program in the analysis of qualitative research data, it is necessary from the outset to understand fully what computers can and cannot do in the research process.

While software offers several ways of organizing and managing qualita-

tive research data, computer programs do not, on their own, analyze the information. Instead, technology provides researchers with support, structure and quality control of their data. A computer can free the mind of the researcher from the mechanics of qualitative data analysis so the focus can be placed on the more important aspect of research - the thinking.

Another benefit is the size of the research projects that can be undertaken thanks to the capabilities of computer storage. These days it's not unusual for national research projects to be spread across a country and feature numerous moderators and 100 interviews and focus groups generating enormous data files. Conducting studies of this magnitude in the traditional pen-and-paper format would involve massive amounts of work.

Responsibility of the researcher

It is vital for everyone involved in the qualitative or quantitative research field to understand that the decisions made to uncover themes in a study remain the responsibility of the researcher, not the computer. The strength of the analysis depends to a large extent on the well-established strategies used in analyzing qualitative research data, regardless of whether computer technology is used.

In addition, the software allows the analysis process to be structured. Its progress can be recorded as it develops, thus establishing an audit trail that clearly demonstrates how the analytic ideas and themes emerged. The ability to review processes and procedures has always been of the highest order in scientific research to allow peer review. Rather than stifling this important part of the research process, technology can actually enhance it by allowing comment and criticism of the computer audit trail throughout the project. Researchers can also use this information to substantiate that they are not subject to any kind of bias or preconceived notions.

Significant pressure

Commercial researchers are often put under significant pressure to deliver the client briefing within unrealistic time frames, ones which can force compromise in the quality of the results.

Given this all-too-common scenario and the lack of any form of encouragement from the clients to deliver greater transparency of the analysis that delivered the recommendations, is it any wonder that the commercial researcher will follow the most cost-effective and expedient method possible to meet the client's demands?

While some academics are proactive in using software in their research projects, their teaching-university colleagues at the undergraduate level often remain focused on traditional processes. Few universities introduce the concept of using qualitative software tools at the undergraduate level (although some educational institutions have introduced software in undergraduate courses in marketing and business). The result is that the majority of qualified qualitative researchers emerge from the educational system with a mindset that technology has no place in the world of qualitative analysis. There are signs that this is beginning to change, as the younger generation who are used to technology expect the inclusion of it in their studies and future careers. But there is still a long way to go.

Ways that are different

There is evidence that researchers who include technology in their projects are undertaking analysis in ways that are different from those used before software was available. This is because researchers no longer need to keep to habits that were only necessary because they used paper-based material. This in turn encourages researchers to use new data forms and introduce new types of analysis that technology makes possible.

Instead of technology being a barrier to research, the tools for qualitative analysis have the potential to open up a raft of new and interesting insights into consumers' current activities and behaviors. The qualitative research industry needs to recognize this as an opportunity and not be left behind by relying solely on traditional methods. | Q

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Beyond the heat map

There is no doubt that the eye-tracking revolution has begun. What was once an undersized niche market, comprised of a few early adopters and university labs, is now used in many diverse industries. Recent advances in hardware have improved the flexibility of eye-tracking systems and new software has eased the process of data collection. These enhancements, coupled with a growing interest in exploring more objective methods, have inspired a new generation of researchers to investigate this technology.

Of all of the industries that have begun to use eye-tracking, none have been more enthusiastic than the fields of usability and marketing research.

Advertisers, Web developers, package designers and media directors have all started looking to the eye of the consumer for insights into product perception and motivation to purchase. The potential applications of eye-tracking - from the television screen to the computer monitor to the grocery-store shelf to the billboard - are myriad.

However, for many in these fields, initial attempts to put eye-tracking into practice have been less than satisfactory. Data have caused confusion. Findings have seemed inconclusive. Problems have been left unsolved. Lost in all of the excitement of running that first eye-tracking study has been a very basic question: What does it all mean? Standard eye-tracking analysis software, which generates little more than a heat map of visual attention and some simple viewing percentages, demonstrates a problem of style over substance. Sure, the heat map possesses a great deal of "Wow!" value, but what can it really tell us about specific research questions? How does this tool get us any closer to understanding our potential customers?

Principles for interpreting eye-tracking data

Editor's note: Mike Bartels is senior project manager at EyeTracking Inc., San Diego. He can be reached at 619-265-1840 or at mbartels@eyetracking.com. To view this article online, enter article ID 20090103 at quirks.com.

These are reasonable concerns. But before researchers transform their eye-trackers into high-tech paperweights, it is worth taking a step back and considering the methods. A meaningful interpretation of eye-tracking data requires a specialized course of analysis, one that involves thorough understanding of visual behavior and how it relates to other information. As a starting point, we suggest three basic principles that one must consider when attempting to use eye-tracking for their next study.

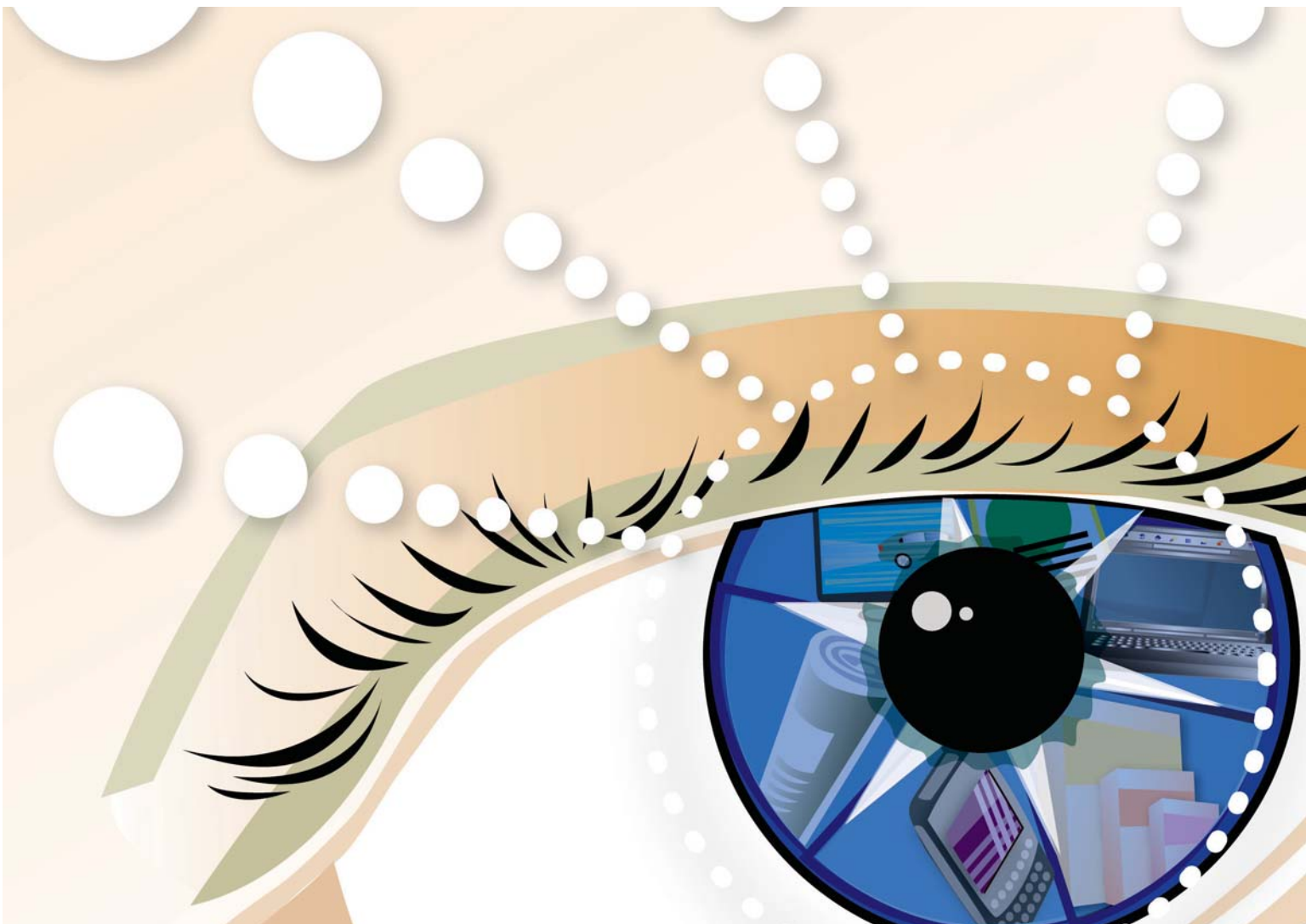
Principle 1: There is no simple answer

Take a look at Figure 1, which shows the visual attention to a Web page. What does this tell you? Is the Web site successful? Do people understand the content? Can a new user find what they are looking for quickly? What features cause confusion? What features are most useful?



Figure 1: Analyzing the heat map won't give you the full picture of a viewer's experience with and reaction to a Web page.

If your answer to the preceding questions is "I don't know," then you understand the first principle of interpreting eye-tracking data: There



is no simple answer. Anyone who attempts to evaluate a medium by simply generating a heat map of eye-tracking data has failed to appreciate the complexity of consumer behavior. Did a particular advertisement receive so much attention because it was visually appealing or was it because it caused confusion? Was the package on the shelf completely overlooked, or was it noticed briefly and then actively ignored? These kinds of complex questions are beyond the scope of simple graphic representations of eye data. A heat map is one of many useful ways to illustrate trends, but it should only be used to complement more descriptive assessments. The movements of the eyes are part of an intricate system that cannot be fully explained through simple analyses. Further layers of exploration are required to understand the root of visual behavior.

The first principle offered here dismisses the idea that eye-tracking is the simple answer to all of your questions. Sorry, you'll find no marketing research panacea here. This does not mean that the conclusions



Figure 2: Analysis must be broken down into thin slices to obtain an accurate reading of what the eye movements indicate.

will be complicated; in fact, a properly conducted eye-tracking study will generally produce results that

are quite intuitive and easy to understand. This principle simply means that, in order to draw insightful conclusions, our methods of analysis must delve deeper into the user experience. As we'll discuss in Principles 2 and 3, quantitative and qualitative resources must be used together to establish a closer connection to the consciousness of the consumer.

Principle 2: Quantify the consumer

A quantitative interpretation of eye-tracking data requires a working knowledge of statistical analysis and a full understanding of the many ways that eye data can be scrutinized. It starts with the initial setup of the study. If you are interested in learning how much visual attention is allocated to a logo in a commercial or a product shot on a package, you must recruit a large enough sample to ensure that you can draw statistically-significant conclusions. The specific sample size will depend on multiple factors, including how many different groups you are testing and how many designs you are showing. It is usually best to consult a statistician with experience in eye-tracking research to develop the optimal study design.


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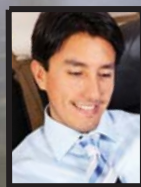
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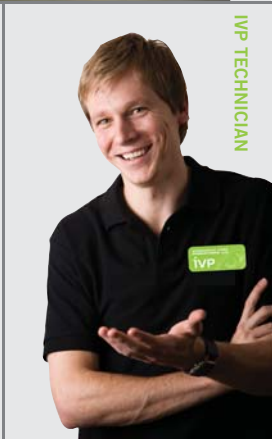
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Adept Consumer Testing
(Encino)
Adler-Weiner
Adler-Weiner (Irvine)
AIM
AIM (Long Beach)
Fieldwork Los Angeles
(Irvine)
Focus Pointe Research
House of Marketing
Research (Pasadena)
LW Research (Encino)
Meczka Marketing
Research
Murray Hill Center
Plaza Research
AIM (Costa Mesa)
Schlesinger Associates

MINNESOTA

Ascendancy Research
(Minnetonka)
Delve (Minneapolis)
Fieldwork Minneapolis
(Edina)

MISSOURI

Delve (Kansas City)
Delve (St. Louis)
Focus Pointe (St. Louis)

NEW YORK

Focus Pointe Research
Fieldwork New York
(Westchester)
Innovative Concepts
(Long Island)
Murray Hill Center
New York Consumer
Center
Schlesinger Associates

NEW JERSEY/ NEW YORK (metro area)

AIM (Hackensack)
AIM (Morristown)
Fieldwork East
(Fort Lee, NJ)
Focus Pointe Research
(Teaneck, NJ)
Meadowlands Consumer
Center (Secaucus, NJ)
Plaza Research
(Paramus, NJ)
Schlesinger Associates
(Edison, NJ)
TAI (Teaneck)

OHIO

AIM (Cincinnati)
AIM (Columbus)
Delve (Columbus)

PHILADELPHIA

Delve
Focus Pointe Research
Focus Pointe
(Bala Cynwyd)
Focus Suites
(Bala Cynwyd)
Schlesinger Associates
(Bala Cynwyd & Center)

PHILADELPHIA (metro area)

Plaza Research
(Marlton, NJ)

PHOENIX

Delve (Tempe)
Fieldwork Phoenix
(Scottsdale)
Fieldwork Phoenix
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Olchak Market Research
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Delve (Appleton)

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Aspect in the City
(Manchester)
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(London)
The Research House
(Wimbledon)

Other factors that should be considered to ensure the viability of quantitative results include the order of presentation and the experience of respondents. It does little good to report that a golf-course advertisement received 11 percent of visual attention on a magazine page if the advertisement was always shown on the last page and only to people who dislike golf. Taking these steps early in the process of study development is well worth the effort when you can later boast scientifically-valid results.

After designing a sound research study and running participants, the real fun starts. There are many ways to analyze eye-tracking data from a quantitative standpoint. Most basic analysis software provides the option of examining the percentage of visual attention allocated to specific areas of interest. When used correctly, this is a powerful tool in demonstrating which features are seen and which ones are not. If you only want to know how much time people spend looking at your pack-

age on a shelf, then a percentage can tell you that. However, in our experience, marketing research questions are rarely this simple. The percentage of attention to a product, logo or advertisement does not generally reveal all of the necessary information. In order to see the big picture, it is often necessary to think small.

Figure 2 is a GazeTrace of one participant viewing a package for a period of two seconds. You cannot underestimate the value of thin slices in building accurate interpretations of eye data. By dissecting the testing sessions into second-by-second behaviors, a variety of new questions can be answered: What is the first thing that draws attention? How carefully is text considered? Which features are seen last? Which features are revisited?

Any broad analysis of a visual stimulus runs the risk of missing these precious morsels of information. As shown in this graphic, eye-tracking allows us to isolate and describe these small slices of behavior in a meaningful way. Web users do not experience a site or advertisement in one giant gulp; we consume it in small experiential pieces. Thus, analysis of our behavior should take a similarly-focused approach. A quantitative analysis of eye-tracking should aggregate these microfindings to clarify the more global conclusions demonstrated by overall percentages of attention.

To put it another way, you cannot describe the forest without looking at the trees. Luckily, for the trained eye-tracking researcher there are a variety of analysis options available to connect the minor details with the major themes. In addition to broad analyses of overall attention, there are focused methods for examining discrete trends. You can explore the order that particular features were viewed (e.g., was the product flavor viewed before the brand name?). You can determine how likely people are to look at specific content (e.g., how many people glanced at the contact information?). You can gather information on which items are viewed multiple times (e.g., once people viewed the advertisement, were they likely to return to it later?). You can establish the degree to which people are engaged by examining pupil dilation (e.g., did

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people zone out during the commercial or did they pay attention?).

Eye-tracking provides exact measurements for behaviors that were once only conjecture. Although the process of analysis is more complex, it pays off many times over in the quality and depth of learnings provided. Through quantitative analysis of eye data, researchers can add an objective component to a traditionally subjective field of study.

Principle 3: Qualify the eye

The human eye is an amazing organ. There is a great deal that it can show us in the way that it moves, the frequency of its blinking, the places it lingers and the dilation of the pupil. One important thing that it cannot do, however, is speak. Eye-tracking is by no means a substitute for a good qualitative interview. There are certain questions that can only be answered by directly asking participants what they think, just as there are certain topics that can only be addressed through analysis of eye movements. In our experience, when eye-tracking and interviews are incorporated into a hybrid research design, the quality of both components is improved.

One approach we employ uses information from eye-tracking to generate better interviewer questions and more accurate interviewee observa-

tions. This technique aims to combine the realism of an uninterrupted testing session with the depth of information available in think-aloud and focus group research. In other words, you can still gather the same detailed impressions and perceptions of the consumer without disrupting their experience by continually asking, What are you thinking now? ... How about now? ... And now?

The procedure is simple. Participants are allowed to interact with the testing material - be it a Web site, television show, package or magazine - without interruption. Once the interaction is complete, a video of their eye movements during testing is shown. As the participant watches their own visual behavior from the testing session, they can recall first impressions, points of confusion, positive features and other details that may otherwise have been absorbed into more generalized recollections. This technique has proven effective in combating some of the moderator's most enduring vexations: respondents forget quickly, they make up stories, they add misleading details, etc. Providing the respondent with a video showing exactly what they looked at enhances the richness of their feedback.

We recently used this method to evaluate the advertising pres-

ence of an online university. After participants interacted with a Web page, they were asked why they had not clicked on any of the embedded advertisements. While considering this question, they were provided with images of the targeted ads, but eye-tracking videos were not initially shown. Most participants remarked that they did not click on the ads either because they never saw them or because the copy was unappealing. If we had stopped there, we might have recommended to our client that the advertisement be made flashier and the copy be reworked.

However, after following up with an interview, this original assessment proved to be misleading. While watching the video of their eye movements, many who at first claimed to have never seen the advertisements realized that they had actually looked directly at them. They were forced to resolve these differences between their subjective recollections and the objective measurement of their eye movements by thinking more critically about their experience. It became evident to most participants that they had, in fact, viewed the ads, specifically the animated graphic within each one. After noticing this, the moderator was able to focus a line of questioning on the impact of this graphic on their decision not to click. As it turned out, "unappealing copy" had been a useful scapegoat for respondents because it was easier to explain than the aesthetic problems that they had with the graphics. In this example, the use of traditional interview techniques alongside eye-tracking provided us with a means to move beyond respondents' snap judgments toward a more accurate appraisal of their experience.

There are a few things to keep in mind when conducting this type of interview. The first is that the software used to replay the testing session must not be cumbersome. The moderator should be able to jump quickly between time segments in the video without disrupting the flow of the interview. When conducted properly, the recorded eye movements will make life easier for both moderator and respondent. Another point to remember is that you must remain



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cognizant of the larger picture. There is a wealth of interesting new qualitative information to be obtained from discussing participants' eye movements but it is important to focus on major themes as well. The interview should strike a balance between overall impressions and the details from eye-tracking that drive perceptions. The final point is that this technique requires practice. To understand the nuances of eye movements, a moderator should prepare by watching videos of eye data and consider what different patterns of visual behavior might tell us about the thoughts and perceptions.

Quantify the behavior

In our experience, the three principles described here are essential for any researcher seeking to unlock the full potential of eye-tracking: you must be wary of oversimplification, you must quantify the behavior of your participants and you must incorporate qualitative feedback into your analysis.

This is by no means a complete list of everything you need to know to run a successful eye-tracking study, but by a long shot. There are other data

to incorporate, such as Web usability measures and questionnaire responses. There are different types of hardware to choose from, including remote and headset models. There are multitudes of stimulus presentation methods, performance metrics, graphic rendering tools and analysis plans that all must be carefully scrutinized to determine the correct path for your study.

Obviously, getting started is no easy task, but the quality of results and clarity of conclusions make this effort worthwhile. A well-designed study featuring an elegant course of analysis has the potential to provide a valuable vantage point into the mind of the consumer. It is this potential that has stimulated excitement in the usability and marketing research communities.

The key to practically applying it lies in the training and tools of the researcher. Our experience has taught us that the three principles described in this article are a good place to start on your way to becoming a seasoned eye-tracking user. From there it is simply a matter of education, practice and perseverance. Whether you keep an expert on staff and conduct your research in-house or

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Thanks for asking

Here's a simple exercise for every marketer who values customer satisfaction: Create a simple 10-question survey. Ask nine random questions and make sure to include an open-ended comment question at the end. Send it out to all of your customers every six months. Then, don't do anything with the data.

You might just double your customer retention rates.

Don't believe this could be true? It's already been proven. The act of sending a simple survey to customers, regardless of what the outcome is or what is done with the data, can enhance customers' opinions of your firm.

Why? The game-changing notion of participation. Participation makes us believers and serves to establish an emotional bond. In this example, which was an actual market research experiment conducted by Paul Dholakia and Vicki Morwitz for *Harvard Business Review*¹, just sending a survey and asking for customer feedback had a positive impact on retention rates.

Why? Because end-users felt that the company was listening to them. They felt the company cared about their opinions and demonstrated this by asking them for feedback. Generally speaking, if we as consumers are involved in an endeavor, the rules of the game change - we grow more forgiving and become emotionally attached to the cause. The hierarchal, top-down relationship between companies and their customers evolves and becomes something new: a partnership, one in which customers

are given a mechanism to contribute their ideas and, most importantly of all, a sense that their ideas are actually being heard.

While the concept of customer satisfaction will always be a business priority and a determining metric for eventual success in the market, any marketer worth his or her salt will tell you that it's typically assigned an arbitrary value. For marketers who have dedicated themselves to truly engaging with

their customers and fundamentally changing the company/customer communications paradigm, a new model is required. This is what it means to move beyond customer satisfaction.

One key question

If you step back and really think about the concept of customer satisfaction, you'll come to understand that it comes down to one key question: Are customers deriving value from my product or service? The very



By Vivek Bhaskaran

Feedback portals can engender customer goodwill, satisfaction

Editor's note: Vivek Bhaskaran is the founder and CEO of Seattle-based Survey Analytics. He can be reached at vivek.bhaskaran@surveyanalytics.com. To view this article online, enter article ID 20090104 at quirks.com.



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Integral facet

Whether it's a major brand such as Starbucks or Dell or a grassroots political organization, real-time feedback portals are fast becoming an integral facet of the customer feedback loop. Here are some current examples that showcase the breadth of these systems:

Choice Hotels (<http://choicehotels.ideascale.com>) - In the first 24 hours following the sending of the initial invitations to ChoiceHotels' internal audience of owner/operators, more than 60 ideas were posted and more than 400 users signed up to either post, comment or vote on ideas.

MyStarbucksIdea (www.mystarbucksidea.com) - When Howard Schultz took back the reins of Starbucks in January 2008, a real-time feedback portal was the centerpiece of the coffee giant's initiative to bring the wisdom of crowds to its brand-reinvigoration efforts. Since its launch, some of the most popular ideas such as free Wi-Fi and punch cards have been rolled out across its broad network of stores.

Ubuntu Brainstorm (<http://brainstorm.ubuntu.com>) - Ubuntu is one of the most popular flavors of the Linux operating system on the market. As an open-source operating system, it is not surprising that its development team was one of the first to implement a collaborative feedback portal to solicit new ideas and engage the Ubuntu community in its further development.

AskTheSpeaker (www.askthespeaker.org) - Operated by Netroots, a progressive site for political activists, Ask The Speaker invites citizens to pose their questions and offer up their ideas and suggestions to Speaker of the House Nancy Pelosi. Other forward-thinking political operations and candidates are also experimenting with feedback portals as a way to forge community with their constituents.

with the overall process.

However, the concept of customer satisfaction is emblematic of a passive and tired communications model - one that still has an obvious utility but represents only the first half of the new marketing calculus. This is where the concept of customer engagement comes into play. Customer engagement captures a critical dimension of the value chain by measuring the extent to which customers are involved with your business: Do they agree to sit down with you when you want to talk to them? Do they feel the need to give you feedback when things don't go the right way? Do they suggest ideas and tools for you to use to improve a facet of your business (in the same way a friend or colleague might)?

Customer engagement - not just customer satisfaction - is the brass ring that marketers must strive for when establishing their business objectives. Indeed, customer engagement will prove to be directly proportional to a company's growth potential. The customers who become engaged in your business are essentially the early-adopters and evangelizers. They are the source of any successful word-of-mouth campaign, and if you succeed in making them feel as though they are part of the very fabric of your business they will quickly become one of your most important strategic assets.

A complete arsenal

A broad array of tools and technologies are now shifting the way companies interact with their customer base. From blogs and wikis to

term "customer service" has become something of a catch-all that seeks to answer a wide range of questions, from "How likely will a customer be to purchase again?" to "Will this customer tell all of their friends about my product or service?"

As a marketing metric, customer service can be somewhat illusory. While it's commonly understood

and universally desired, it is also highly arbitrary. We chase after high customer satisfaction rates not because it's cool to tout 97 percent-satisfied rates in press releases or say to the world that your customers are happy. Rather, it's a legitimate reflection that your customers are indeed deriving value from your product or service and are satisfied

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user forums and surveys, marketers now have at their disposal a complete arsenal of engagement weapons that can be used to change the traditional communications paradigm. And with every passing day, new services like Twitter are further changing the nature of the communications game.

While the utility of blogs, wikis, forums and surveys is well-known, real-time feedback portals remain relatively uncharted territory for most marketers. Unlike these other communication vehicles, feedback portals are designed explicitly to solicit opinion and engage users in a peer-to-peer manner. The engagement model is not just about connecting with your customers. Think of every individual in your community as a spoke in the communications hub. It is just as important to connect them to each other as it is to connect them to your business.

By building a community of users around your product or service – around the very concept of feedback, suggestions and new ideas – an interactive venue is provided that encourages unstructured feed-

back (long the bane of researchers, who were typically seeking to build composite scores based on numerical assignments). Feedback can then be organized using categories and other prevailing taxonomy schemes so that information is automatically organized into relevant buckets of knowledge.

Finally, and perhaps most important of all, the community itself is empowered to rate the relative merit of each idea, and then in a Digg-like way, vote the best ideas to the top (in a truly democratic fashion, any idea can be voted to the top or buried on the bottom). In pure market research terms, real-time feedback portals represent a fusion of qualitative research (open-ended comments) with quantitative weighting (voting model superimposed). This is when the magic starts to happen and why the real-time customer feedback portal might become the most important tool in your bag of tricks.

Four key steps

Building and establishing a crowd-sourced feedback portal generally consists of four key steps:

1. Securing internal buy-in and determining a core objective.
2. Identifying and deploying a software solution that fits your budget and scope.
3. Promoting the feedback portal to channel all feedback through the portal.
4. Establishing credibility by showing the users that ideas and suggestions submitted by users are actually acted upon.

Internal consensus

As with most technology innovations, securing internal consensus is a prerequisite for success. Here are a few practical tips for convincing the powers that be to green-light such an initiative:

- Reduce risk by narrowing the scope of the project and inviting only a core subset of your customers (the “super users”) to participate in the first phase of a feedback community. Establish internal credibility by executing a pilot project that demonstrates real value. It’s equally important to demonstrate



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that the feedback provided by the community is on par with the standards that you set.

- Position the feedback portal as an early warning system or a dynamic customer research panel. Feedback portals can serve as an effective early warning system for new products and services. Given the opportunity to provide unsolicited feedback, customers are far more likely to share their experience, providing the operational side of your business (e.g., customer service, network operations, etc.) with the ability to mitigate buggy features or potential issues.
- If you don't provide a forum for feedback, someone else will. We live in a Web 2.0 world, and, consequently, anyone with a computer and an Internet connection can get their voice heard. Sometimes the results are less than flattering (see: www.comcastmustdie.com). Feedback portals not only allow the communication to be funneled, but more importantly, they provide the means for companies to address the issues that matter on your turf rather than somewhere else.

Technology solution

Once stakeholder consensus is secured, a technology solution will be required to actually enable you to achieve the stated objective. Here you'll have to think through a few considerations:

- Hosted solution vs. installed. This is an old debate that continues to rage in the technology world. I am a proponent of the core competency argument (i.e., stick to your core competency and outsource everything else). Opting for a hosted solution if you are conducting a pilot project will cause fewer headaches and get you off the ground faster.
- Platform solutions vs. product solutions. This is a tough one, and you'll have to evaluate this based on your own specific set of technology circumstances. Social media platform solutions provide a broad range of tools (e.g., blogs, forums, feedback portals, surveys, etc.) while product solutions are domain-specific and tend to do better on a feature basis. For example, Wordpress is a terrific blogging tool, but that's all it will do.
- Customization and pricing models. Customization is vital as the brand experience should be consistent with the rest of your online presence. This will make it considerably easier to gain acceptance, both internally and with your external audiences. Pricing should be flexible enough so you are not locked into a long-term contract, especially if you are in a pilot-phase mode.

Channel feedback into your portal

Funnel most or at least a significant part of your feedback and data collection efforts through the feedback portal. One of the common issues that companies have is confusing feedback with support. Generally speaking, forums are the correct model for support (where users can answer one another's operational issues and questions), so try to ensure that your feedback portal does not become a support forum. Here are some tips on how to channel feedback into your portal:

- Promote and announce your feedback portal on all outbound marketing efforts (e.g., e-mail, press releases, blog posts, etc.).
- To jumpstart the feedback portal and demonstrate how it should be used, be sure to seed it with a healthy number of suggestions and ideas.

- Define and request resources to actively manage your community. Moderators are required in any community-building effort and rest assured you will get trolls and users who have a destructive agenda - you simply need to be prepared and address the issues as they come up.

Acting on their feedback

One of the key advantages that idea/crowd-sourced feedback portals provide over surveys is the ability to proactively manage the idea/suggestion life cycle. Simply said, it is imperative that you let your community know that you are acting on their feedback. Unlike surveys, where there is no mechanism to deliver information back to the community, feedback portals provide a forum for dialogue.

For example, in our IdeaScale product we send e-mail notifications when the status on an idea changes. When an idea is initially submitted it is marked as "under review," and when it is actively being review it is noted as "in progress." This is important because this status reinforces the emotional and birthing aspect of ideas and suggestions. Another way to acknowledge the receipt of ideas is to actively blog about how specific ideas are being implemented

Know they're being heard

Internet technologies have transformed the way companies engage their customers. It's no longer enough for companies to say they're listening. Customers want to know that they're being heard. In the interactive age, ideas are the new currency. As a wise man once said, you learn more by listening than you do by talking. The companies that truly understand this aphorism will have a significant advantage over their competitors. | Q

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As a researcher, you want to keep response rates up, panelists happy and recruits eager to participate in more of your surveys. However, competition is ever-increasing for panelists' time, in the form of other research companies, the media, blogs, direct mail and e-mail, to name a few. How do you combat it all? Increase respondent satisfaction.

To find ways to do that, I analyzed metrics, comments and ratings for thousands of surveys over the years. While I and others expected more incentives to be the answer to increasing respondent happiness, my analysis revealed a number of satisfaction drivers that didn't cost any extra money to improve.

"Can't buy me love" is how the Beatles song goes. Satisfaction is not all about price (as marketing research often proves). So instead of giving away more money to your research subjects, try this list of 10 ways to increase respondent satisfaction:

1. Make surveys engaging and convenient. Although the content and subject matter may be wildly interesting to you as the researcher or the client, respondents may not feel the same way. People don't like to be bored. And what do people do when they get bored? They pay more attention to time (I'll discuss more about time later).

How do you prevent respondent boredom? According to my research, respondents who reported lower satisfaction complained about survey content. Pep up the content with more images and color. Multimedia studies averaged higher satisfaction scores than other studies.

Remember the competition - other research companies, TV, YouTube, blogs, mail. You have to deliver a worthwhile experience that can generate enough interest for a complete survey. While you're sprucing up the survey, punch up those headlines for your recruiting invitations. Instead of boring run-on subject lines, make them five-word attention-grabbers like the media and advertisers do.

Convenience drives our society, too. The more convenient it is to enter and answer a survey, the more satisfying it is.

2. Avoid complex questions. They require more thought and work. The more thought and work required, the more time-consuming and inconvenient the experience. Soon, you'll have a dissatisfied respondent.

You can prevent questions from being too complex by eliminating some research-related work. For example, notify panelists of items that are needed to complete the study prior to its start to make participation easier. If you already have certain information on panelists from another data



By Nate Hardy

10 ways to keep your panel respondents happy

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source, simply append it to the study data and do not ask for it in the survey.

Removing complex questions may cause the most problems for statisticians, who require complex point-allocation and choice-modeling questions for their data needs. A balance must be struck to ensure that respondents don't have a negative survey experience.

Complex questions can reduce clarity and increase confusion, leaving the respondent unsure how to answer. It's best to stick to concise wording along the lines of laser questioning (who, what, where, when, why and how), which asks for specific information about an object without using extra clauses or explanations. This type of question elicits better answers from respondents.

3. Limit questions to less than 50 words. Question length is a significant driver of survey satisfaction, which declines more quickly after crossing the 50-word mark. Shorter questions are less complex and look easier to answer. For online surveys, many market researchers put only one question on a Web page - now that's what I call using white space.

The 50-word limit puts pressure on shortening those long lists of answer choices we've all seen before. Answer choices alone can easily run over 20 words. Reduce answer choices, or the

10 Ways to Increase Panel Respondent Satisfaction

1. Make surveys engaging and convenient
2. Avoid complex questions
3. Limit questions to less than 50 words
4. Avoid long lists of rating questions
5. Avoid open-ended questions
6. Avoid repetitive questions
7. Advertise accurate survey times
8. Pay incentives promptly
9. Pre-test surveys thoroughly
10. Get feedback on surveys

text for each one, to give respondents less reading work to do.

4. Avoid long lists of rating questions. We've all seen these before. They're often repetitive, intimidating masses of words that leave little white space on the page. I've seen surveys in which a one-page block of over 40 rating items was cycled repeatedly for several pages, giving panelists a total of nearly 200 items to answer - and they still had dozens of questions left in the survey.

Based on a separate study I've done on data quality, I've found exhaustive rating lists raise the possibility of

respondents entering bad answers just to get through the survey. Bad survey design = bad data.

To avoid this, break long lists into smaller parts. For online surveys, make lists continue onto another Web page. If that's not enough, you could break the whole study into two surveys.

5. Avoid open-ended questions. They take more time, thought and work to answer. In addition, the time it takes to answer open-ended text questions is harder to estimate, leading to less-accurate advertised survey times and, consequently, more disgruntled respondents when their actual completion time is longer than promised.

Granted, qualitative data is needed for many studies. However, if you can brainstorm answer choices and create a closed-ended question, you'll likely be better off. The fact that open-ended questions are more time-consuming and costly to analyze is another reason to avoid them.

6. Avoid repetitive questions. Another complaint linked to low satisfaction is repetition. Answering questions that seem to be the same or seeing the same text over and over can frustrate survey takers.

Repetition is a necessary evil for certain studies but it can be minimized. Questions can be worded or positioned in a way that they don't make panelists think, "Hey, didn't I just answer that question?" If other questions already cover the repetitive question's objective, cut the question. If it can't be cut, space it further apart from the others.

7. Advertise accurate survey times. The length of a survey is not a factor for dissatisfaction. Respondents don't mind taking surveys that require a lot of time as long as you tell them the correct time expected. I compared surveys over a half-hour long to much shorter surveys and found no difference in satisfaction. Yet when I compared surveys that ran at least 10 percent over the advertised time, satisfaction went down significantly for both long and short surveys.

Respondents become upset when you violate their expectations. You must manage their expectations and inform them appropriately so they can



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make solid participation decisions. Even inaccurate completion status bars disappoint online survey takers.

To improve satisfaction, obtain a realistic estimated time range to advertise. To cut down on survey completion time, make sure every question is clear and not too wordy, as mentioned earlier, and reduce open-ended and complex questions. Improving your completion status bars is a function of your survey programmers and software vendors. Talk to them to see what upgrades they can install to address this.

8. Pay incentives promptly.

It can take new panelists a month or so before they learn exactly what to expect regarding your payment schedules. After this honeymoon period, things get tougher. Make sure you have a reliable schedule and stick to it, or you'll have panel retention problems.

Panelists talk to each other about the work and incentives involved for research studies. There are a variety of informal forums online where panelists compare research firms, incentive rates, etc.

Like the satisfaction issues surrounding survey times, respondents become upset when you violate their payment expectations. Do your payments arrive on time? Is your competition paying monthly, weekly, instantly? You need to find out.

9. Pre-test surveys thoroughly.

This should go without saying, yet there are researchers who don't go far enough during pre-testing. Untested surveys can cause a host of problems not only with panelists but with end-user clients as well.

Poor pre-tests can result in reduced data quality; uninteresting, inconvenient surveys; confusing and complex questions; inaccurate advertised survey times; and too-low incentives based on these times.

10. Get feedback on surveys.

Your panelists are like customers and employees, with similar marketing and motivational issues to address. You have to rely on word-of-mouth and direct advertising to get them in the door. And you have to pay them to work on deliverables for your clients.

As with any organization that keeps tabs on customer and employee satisfaction, survey your panelists. Have them rate your studies and incentives and anything else that impacts respondent satisfaction. The results will help you design loyalty programs and other efforts to increase retention and response rates. Besides, it's cheaper to keep panelists you have than to replace them with new ones.

What if you don't have a panel and only deal with respondents on a per-project basis? Survey them anyway.

You can tack on two or three rate-the-survey and comments-and-suggestions questions at the end of each survey you field. Make it a standard practice for all of your surveys, for panelists or non-panelists alike.

Buy their attention

If you act on the 10 items above, your good respondents will love you. And when an enticing competitor tries to buy their attention away from your study, your respondents can truly say, "Can't buy me love." | Q



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Entertain me!

Why do people surf the Internet? Many go to hunt for information, to shop or do online banking. In the end, the search for entertainment – in the widest sense – is often most important. Online games or sites like YouTube are popular. To meet other people, even in a cyber sense, is another motivation. The value of entertainment extends to the ad realm, where ads that are perceived as funny are often judged to be more effective than those that don't elicit laughs.

What motivates people to participate in a research study? A kind-looking interviewer at the front door, a well-dressed and polite mall researcher or a telephone interviewer with a pleasant voice can convince almost anyone to complete a survey.

Of course, this is different in the online market research world because of the self-administration aspect: The e-mail invitation and the questionnaire must motivate the potential participant. This is the same with registered online panel members: The registration in the panel and the general interview willingness are not enough.

Online research is becoming more and more popular worldwide as a channel for gathering market data and customer feedback. More than 50 percent of all interview projects in the U.S. are conducted online. Online research has lost the aura of novelty; therefore it is no surprise that response rates have dropped since its introduction in the mid-1990s. In addition, the number of people who start Web surveys only to abandon them midway has also grown significantly.

As a consequence, the main target in the analysis of non-response has shifted. In the past, the focus was on the interviewers and what they could do to increase response rates. Now the interviewees themselves and their

motivation for participation are the target of multiple analyses.

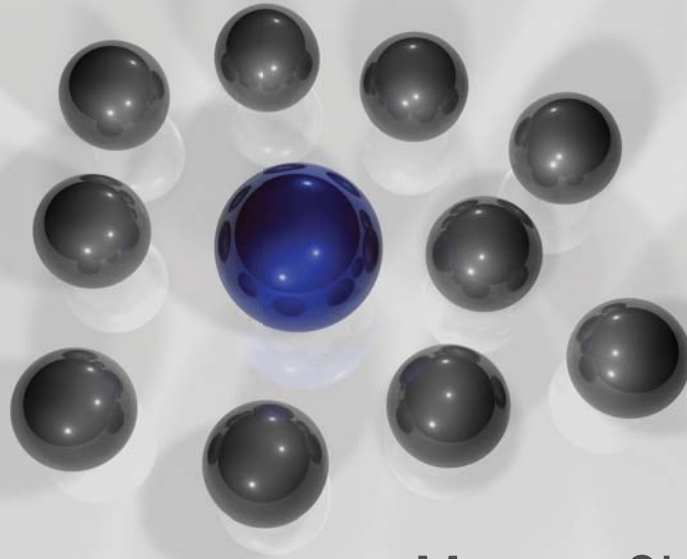
Many of the techniques to increase response rates for Web surveys are not rocket science. The so-called “Anita effect” (“Does the survey sender's gender matter?” *Quirk's*, February 2007) is an example for a simple method: The response rate – especially in a male-dominated environment – is increased by using an obviously female sender in the invitation e-mail. Furthermore, there are strategies to make the experience of interviewee as pleasant as possible, e.g., with the PRD technique (“Using the PRD technique online” *Quirk's*, January 2008) by making the recall of the previous assessments easier (a finding of Lufthansa Technik Market Research,



By Stefan Althoff
and Bill MacElroy

Should an online interview be fun?

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Mystery Shopping

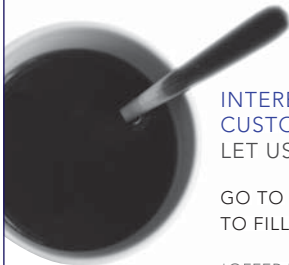
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In addition, there is much known about the most effective strategies for reaching the best potential participants in online research. The control of the e-mail timing alone can influence the success of a study. It can be of importance which day of the week the invitation e-mails are sent out, and that also makes a difference whether you are inviting respondents to a business-to-business or a business-to-consumer online survey.

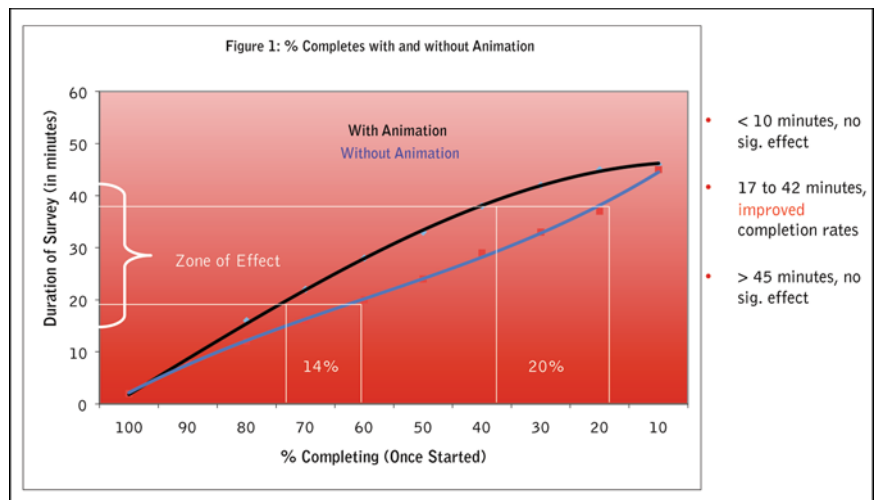
The degree of personalization within the invitation mail and the survey itself can be of importance: For a B2B survey it is better to invite on behalf of a well-known counterpart instead of a CEO who people only know by name. This is similar to the problem with invitations automatically signed by the company president. Lufthansa Technik found that the response rates are significantly higher in more personalized survey designs: The average completion rate rose from around 30 percent to 40 percent.

Number of options

The online medium offers a number of design options. Since so many people use the Internet for entertainment, why not make survey participation fun? An interesting question was posted in the German XING.com expert forum on online research in the summer of 2007: Is the use of engaging technology enough to motivate participants or do these experience-enhancing extras only serve to frustrate survey participants?

Nowadays nearly all online surveys have a familiar layout. The times of directly adapting a paper questionnaire for use on the Web should be long over. An attractive design, matching the corporate identity, is now standard. Furthermore, multimedia elements are being increasingly integrated into interviews (e.g., entering single and multiple answers by clicking on pictures instead of check boxes). However, does this help with response rates?

Socratic Technologies analyzed



which factors influence participation and dropout rate with the aim of solving the problems, if possible. One major finding was that the design of surveys must take into account the interaction between the variables of the burden and the intrinsic personal returns one experiences from participating. These tend to be related to three factors surrounding survey design (together with the extrinsic factors like interest in the topic and affinity with the sponsor):

1. Length of the questionnaire (both in terms of time to complete and number of questions).
2. Incentive (either total incentive offered as prize package or the approximate value of the incentive on an individual basis).
3. Engagement level (the degree to which the survey is perceived to be entertaining and/or intellectually stimulating).

A combination of these three factors influences the number and proportion of survey avoiders and mid-survey abandoners. While a great deal of attention has been paid to the length of the survey and the level of incentive, less study has been devoted to the in-survey experience as an intrinsic motivator.

Following are findings and recommendations based on Web-based studies from 2004 to 2006. All of the studies were with business and consumer technology-related decision makers and included American, European and Asian respondents. The total

number of respondents included in these surveys was 28,437, with a median sample size of 422.

These studies examined the level of engaging activities, which ranged from low-engagement, indicative of a standard questionnaire-based survey with little interactivity beyond simple skip patterns and some calculated variables, to high-engagement, in which Flash-based animations and game-like activities were used as data collection vehicles.

The analysis focused on the level of mid-terminates – an indication of the point at which respondent fatigue, boredom or lack of perceived value becomes critical. Socratic set the critical threshold of fatigue at the point where surveys have a mid-terminate rate of more than 30 percent.

Findings from these studies indicated that no significant differences can be found across different geographies, meaning that engagement appears to be a global phenomenon that influences people of many cultures in a similar way.

Survey abandonment

Socratic found that while incentives can help get people into a survey, the length of the survey and the degree to which it is perceived to be boring causes participant attention to slip and leads to survey abandonment. As might be anticipated, the degree of overcoming mid-termination by successfully embedding engaging elements is related to how long the survey is to begin with: The more



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screens/questions, the greater the number of mid-terminates.

- Specifically, surveys that exceed 30 screens/questions are predicted to exceed the maximum acceptable level of dropouts.
- Other studies have shown that if the survey requires more than 55 clicks, the threshold level for abandonment is met.
- This phenomenon is also related to time. Surveys should ideally last

no longer than 17 to 18 minutes to prevent more than 30 percent of people from mid-terminating.

When attempting to offset the length and duration of surveys, animation and interactivity are only effective within a certain range. For surveys less than 10 minutes in duration, animation produces no significant effects on dropout rates. This is probably due to the fact that most people will self-engage in a survey activity for the required length of time without additional stimulation.

The primary range of effect (Figure 1) appears to be between 17 to 42 minutes, where significant improvement in completion rates is seen with animation added, compared to surveys of that length without additional stimulation. For surveys beyond 45 minutes (which are not recommended), animations, interactive exercises, etc., have little effect on reducing dropout rates. (As a point of reference, none of the survey satisfaction factors - interest in the topic, level of incentive, sponsor affinity, etc. - are effective for retaining respondents in surveys lasting more than 45 minutes.)

Are boring

This research indicates that the single greatest factors influencing survey avoidance and mid-termination are respondent fatigue and the perception that online surveys are boring. Socratic Technologies has experimented with game-like or engaging environments (where appropriate to the subject matter) and has found that certain interactive and animated elements lead to higher satisfaction with surveys and higher likelihood of future participation.

This is a starting point for advanced Web survey design. Examples of animated activities that increase satisfaction include sorting and arranging tasks, dragging and dropping elements, videos, demonstrations of product functions, and selection tools that have the look and feel of arcade-style games. Many companies now employ some form of animation within their survey

environments.

But this does not necessarily mean complex Flash programming! Many surveys from Lufthansa Technik contain picture strips, and even in standardized questionnaires it is possible to use animated GIF files to replace the pictures or to randomize their display.

In addition to the entertainment value, advanced animations can also help track the experience and actions of the user. Ancillary variables that can be collected and analyzed include how much time someone spends examining an object, how many times they change their minds and how many items they explore.

Techno trap

One word of caution, however, is that using technology for the sake of technology can lead to poor results. Not everything that can be done from the technical point of view must be done. This is the techno trap, which occurs when technology is applied to a research problem when it is unnecessary. Elements such as extraneous animated characters, flying spaceships, blinking lights, annoying sounds, etc., tend to have the opposite of the desired effect: creating distraction and annoyance instead of focus and engagement. Even for simple questions the design can influence the answers. Using random animations and sounds also can increase survey costs, increase the chances of survey technical problems and tends to create overly complex or confusing situations for the respondent.

In the end, everything depends on the design and content of the survey. A good questionnaire is the foundation of good research. It should be the aim of all online researchers to make the job for the participants as easy and pleasant as possible. | Q



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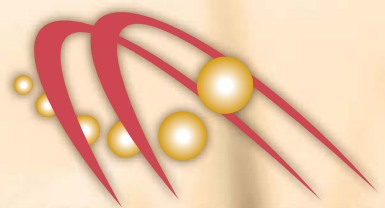
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The hardest job of all

There's an old saying among marketers that "The package is the last ad the consumer sees before she buys the product!" As a corollary, it should be added that the package is the most important ad the consumer sees before she buys the product. There are three reasons why this is true.

First of all, for many brands the package may be the only ad the consumer sees. This is certainly the case for many smaller brands, or for aging cash cows that no longer receive much ad support. But even for heavily advertised packaged goods there may be long periods of hiatus between the times when the consumer is exposed to regular advertising - times during which the package must provide the continuity of brand communication from one shopping trip to the next.

Secondly, the package is probably the most expensive advertising produced for the brand. Designing and producing the packaging for the millions of products that must sit on store shelves is typically a large part of the actual cost of the product itself - and in some cases, such as for perfumes or liquor, the package is an essential part of the brand identity. Changing out the packaging for all the product inventory is something done infrequently and at potentially great risk if the redesign isn't at least as good as the one it replaces.

Finally, because the package is the last ad the consumer sees at the point of purchase it must do the hardest work of any advertising - it must actually close the sale!

Not radically different

For these three reasons packaging research is one of the most important kinds of consumer research that can be conducted on brand communications. That said, the way we should think about the communication elements that contribute to effective package design is not radically different from the way we approach the problem of how to measure other forms of creative executions.

Like all types of communication between the brand and the consumer, a package must accomplish three things: it must first get the attention of the consumer; it must focus consumer attention on the brand; and it should motivate some kind of consumer action or behavior.

Like all types of communication between the brand and the consumer, a package must accomplish three things: it must first get the attention of the consumer; it must focus consumer attention on the brand; and it should motivate some kind of consumer action or behavior.

These primary functions of the package are, in turn, influenced



By Charles Young

Your product's packaging must close the sale

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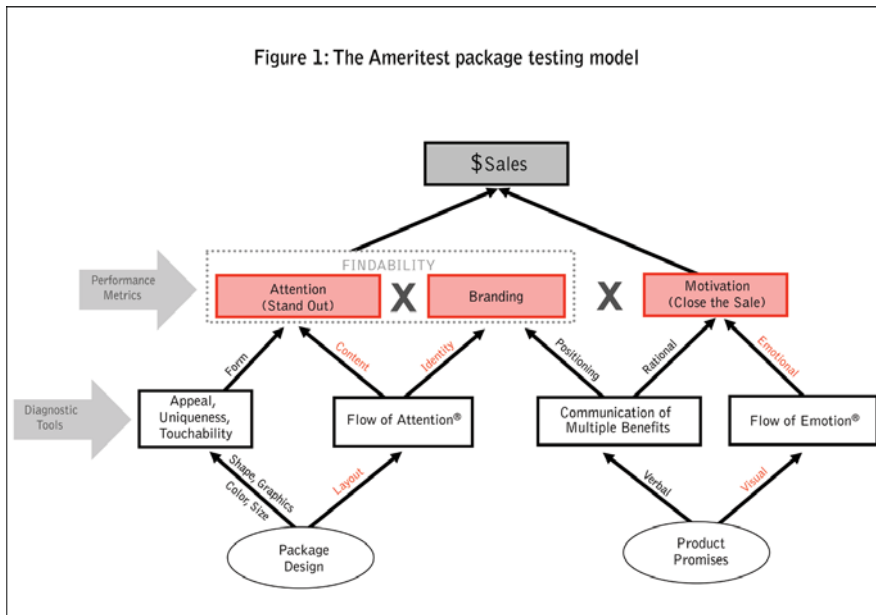
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Figure 1: The Ameritest package testing model



by secondary creative variables. For example, the attention-getting power of the package is a function of both form and content. By form, we mean the design elements such as shape, color, graphics and size - which the consumer might perceive as more or less unique, appealing, or even "touchable" (an important, but poorly understood variable). By

content, we mean the information on the package, both verbal and non-verbal, that the consumer must take in as she looks at the package - a perceptual sequence of mental processing that my firm calls the Flow of Attention.

How good a job the package does of branding the product inside is again a function of two variables:

how quickly the package telegraphs the identity of the brand and how clearly it communicates the positioning of the product versus the competitive offerings on the shelf.

Finally, in order to motivate the consumer - and to close the sale - it is important that the package not only communicate the relevant selling ideas that need to be listed on the package but also engage the consumer's emotions in a meaningful way.

To provide a roadmap to the information that we collect when we measure a package's communication performance, and to identify the analytic tools that we can use to diagnose the reasons why a particular design is working well or poorly, we have developed the heuristic model shown in Figure 1. To understand how some of these variables interact, it is useful to discuss them in more detail.

Attention-getting power can be thought of in two ways, depending on the mindset of the consumer at different moments as she is shopping in the store. For some things,



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the consumer comes into the store planning to make a purchase. These are the items on her shopping list. In these cases the job of the package is to make itself as easy to find as possible, in order to minimize the consumer's search time. For other things, such as new products, the consumer comes into the store not knowing she wants them. She is just browsing, trying to maximize the return on the time already invested in making a trip to the store. In this case, the job of the package is to call attention to itself so that the consumer will notice it as she scans the shelves for something new and interesting.

Given that the average supermarket these days has over 30,000 products sitting impatiently on the shelves wanting to be seen, this is not an easy problem for the brand in either case. From the brand's point of view the problem of breaking through all that clutter is one of getting attention. But if we turn the problem around and look at it from the consumer's perspective, it's also a problem of giving attention. From their point of view, the problem is one of allocating attention as part of a search process.

Scarce resource

From our work testing communications of all kinds we've learned a few things about how the consumer allocates her attention. First of all, attention is a scarce resource - she tends to be frugal with how she spends it. Second, attention tends to be a process that operates largely below the level of the conscious mind. Unconscious emotions, for example, play an important role in driving the selective attention of the consumer's search process.

Third, if you think about it, focusing the attention of the mind is a lot like focusing the lens of a camera, as you rapidly zoom in and out, depending on the kind of information you are trying to process. For example, you might use a wide-angle lens when you pan across a shelf, looking for a familiar brand name. And, if you see something interesting and out of the ordinary, you might zoom in on a

particular brand and focus close-up on the elements on an individual package.

To measure the results of this visual search process, we use a kind of time-lapse photography of what the consumer sees, which we call a flash test. In an online test of a new package design, we expose the test stimulus - either the package shown in the context of a shelf or up close by itself - for controlled periods of time: 1/2 second, 1 second, 4 seconds. After each exposure, the

image is replaced with a reporting grid and the respondent is asked to point to where she was looking and then to write a brief description of what she saw.

Depending on the goals of the research, the questions might vary. For the question of findability for a well-established brand, we might ask the respondent to look for a particular brand on the shelf during limited timed exposures and then ask her to indicate on a grid where she found it. As you will notice



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from the model, findability is actually a function of two variables: how well the package stands out on the shelf or calls attention to itself and how quickly it telegraphs the brand identity. Brand identity can, of course, be communicated in a variety of ways and not just by focusing attention on the brand name - recognizably distinctive shapes, such as those of the Method line of products, might help the consumer quickly find her brand on the shelf.

Results are reported in graphs like those shown in Figure 2, which look pretty much like eye-tracking data, with two important differences. First of all, this data is collected on the Internet, without special eye-tracking cameras. Second, the verbatim responses that go with each timed-exposure provides us with important insights about what the respondent was thinking as she was looking at the shelf or at different elements of the package (including potential confusion) - data which is missing from traditional eye tracking studies.

The Internet is a popular research

medium for testing new package designs, primarily because of the economics, timing and flexibility in respondent sampling. Moreover, the construction of virtual store environments and the technology that allows respondents to pick up the virtual package from the shelf during an interview and turn it around to look at all the sides of the package have increased clients' comfort level with online package testing.

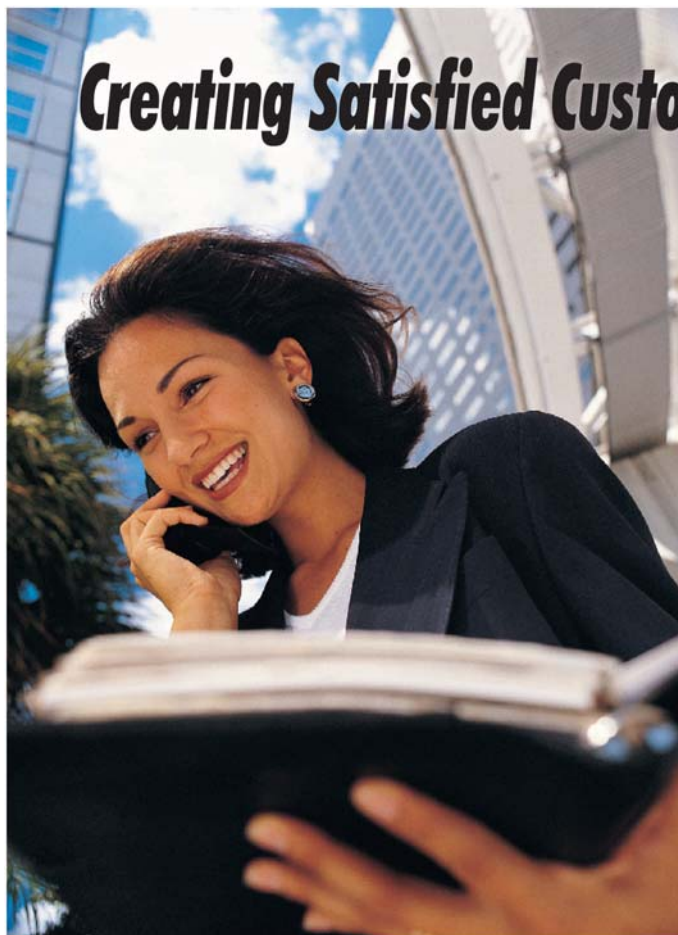
A physical product

For those resistant to online testing, the issue is that unlike a television commercial or a Web ad or even the image of an ad printed on the glossy pages of a magazine, a package is undeniably a physical product. The importance of that physicality can be seen in numerous examples of packaging success. For example, the shape of the iconic Coca-Cola bottle - and how comfortably it fits your hand - is, even today, an important piece of retro brand communication. The squeezable bottle was an important milestone in the history of the Heinz Ketchup brand.

How easily a package can be opened or resealed, how compactly it sits on a kitchen shelf, how conveniently the body wash bottle can be hung upside down in the shower for ease of use, how child-proof the easy-to-open bottle cap is - these are issues of functionality that cannot be studied online. These require package use tests. However, what the package communicates can be studied online quite effectively.

The researcher and author Paco Underhill has spent a lifetime as a consumer anthropologist videotaping and analyzing consumer shopping behavior in the store. One of the interesting things he has found is that the odds a consumer will buy a product increase significantly if the consumer actually touches the product and doesn't just look at it on the shelf. Somehow the act of touching the product causes it to connect with the consumer in a different way, perhaps making it seem more real so that she can more easily imagine it being a part of her life.

Or think about one of the most



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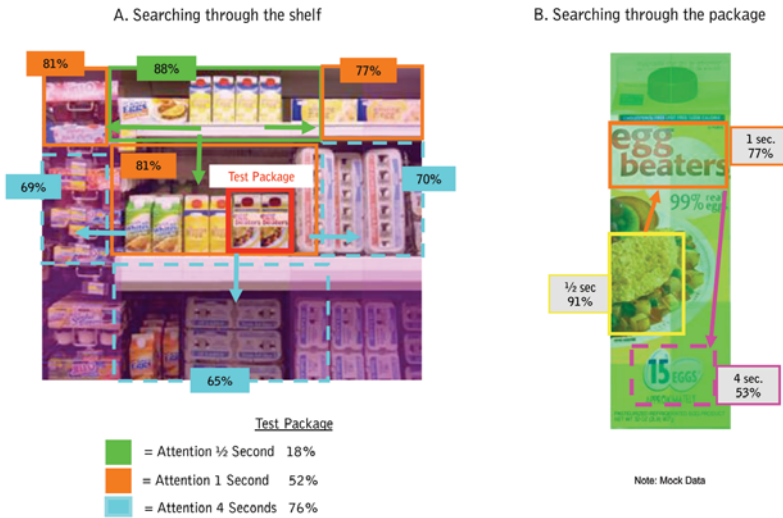
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Figure 2

The online Flow of Attention® methodology uses three timed exposures (1/2, 1 and 4 seconds) to explore two levels of consumer search - the shelf and the package.



how touchable a package is.

Touch the consumer

What is it that a package must communicate in order to make the consumer want to reach out and touch it, to pick it up from the shelf, to look at it more closely? To understand that, we need to examine the role that emotions play in the total communication of a package - because before the consumer will touch the package, the package must first touch the consumer.

But first, we should think about why the typical package is loaded with information. For many products, just about every relevant product feature and benefit that can legally be claimed can be found listed on the package, along with attention-getting graphics and visuals, as well as descriptions of ingredients and consumer-protection copy.

Unlike traditional mass-market advertisements that, as ad agencies often counsel us, should be single-minded in the main message, a package must communicate with any prospect that is thinking about

outstanding examples of product design in recent years: Apple's iPhone. In a very real sense the iPhone is a "package" of technology. To advertise this hugely successful product all Apple had to do was show fingers touching the screen of the phone. The essence of this design

is its extreme touchability.

In an online test of packaging we can, and of course do, ask the consumer, "How likely would you be to pick this up and look at it more closely if it were on an actual store shelf?" This measure of consumer intent is an important diagnostic for

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

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Figure 3

The order of perception of the elements on the package should match their emotional leverage against purchase impact in order to smoothly close the sale. In this example, the fifth element, "Cholesterol Free, Fat Free, Low Calorie," is the most important to consumers, but is small and hard to see on the package.

Order of Attention	Emotional Leverage on Purchase Intent	Package Element	Positive Emotion Score	Negative Emotion Score
1	1		66%	6%
2	2		46%	14%
3	5		52%	9%
4	4		57%	19%
5	3		89%	3%

Note: Mock Data

buying the product. In the final moments of the consumer's decision, a typical package broadcasts multiple ideas like a fast-talking salesman trying to seal the deal!

In fact, an easy way for a marketer new to a category to quickly

conduct a complete inventory of the selling ideas and marketing strategies currently operating in that category is to collect the set of competing products from their shelves in the store and write down all the product claims found on the

packages. All of the selling propositions for the category will be there.

The reason for this is not that the manufacturer is indecisive and can't make up its mind what ideas are important to put on the package. Rather, manufacturers understand that frequently the role of the information on a package is to rationalize human decision-making, which is driven by emotion.

Consider a simple case. Suppose I'm shopping for something to eat tonight and I have a sudden urge to eat ice cream as I walk past the freezer case. I know I'm not supposed to have it because it's not on my diet, but I pick up a container with an appetizing photograph of a scoop of chocolate ice cream and notice that it's "low-fat" and "contains one-third fewer calories." In that case I might be able to overcome my well-meaning adult resistance to my inner child and buy the ice cream - by rationalizing the fat and calories that I didn't buy!

Or consider a slightly more complicated case. Suppose I'm shopping for an over-the-counter



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cold medicine and I do a side-by-side comparison of two products on the shelf. One is a well-known brand I trust, with very appealing graphics and it costs a little more than the other, which is a store brand. I compare the list of symptoms each medicine will treat and find them to be the same, but like many consumers, I will buy the more expensive brand!

But what if the cheaper store brand has a longer list of benefits and the brand name has new, very clean-looking package that reminds the consumer only of the positioning idea the brand has been advertising lately. In that case I think I would be in a quandary - my emotions are blocked by the rational counterargument that I should not have to pay more to get fewer benefits.

Remove barriers

In all three of these cases, the role of the information on the package is not to motivate, it is to remove barriers to the purchase I want to make emotionally. Emotion is the driver of want and desire, of need and impulse; the role of the conscious, rational mind is to constrain and focus our emotional energy into positive behaviors. As a general rule, rational thought has a bias toward inaction.

(This is a common complaint among marketers about us overly-rational researchers - we want to study things too much, rather than "just do it.")

A simple way to model the consumer decision process at the point of sale is to imagine the energy of my needs and desires constrained by my rational thoughts, inhibiting the action that I really want to take, perhaps at an unconscious level: to buy a particular product. You might visualize this as a polygon with many sides, with each side representing an argument in the category about why one brand might be better than another. In this case, the role of the rational information on the package is to systematically remove the barriers to action, one at a time, until enough barriers have been taken down that the emotional energy to buy has been released.

The role of the emotional

information on the package is to generate that irrational, emotional desire in the first place. An example of emotional information would be the appetizing bowl of cereal on the cereal box. Or the image of the beautiful, flowing hair on the shampoo package. Or the image of happy kids and parents spending quality, family time together on the box containing of a board game. It would be visuals of the product in use, of happy outcomes and smiling, satisfied customers - all the kinds of

imagery that can fire the imagination of the consumer so that she can see in her mind's eye how the product inside the package will fit into her world and make her life and the lives of her family better.

In the right order

For a package to communicate effectively, therefore, it is important that the consumer actually sees all this information, both rational and emotional. And it is important that she sees it in the right order, before



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her attention wanders, so that she sees the most important information first and stays engaged until she decides to buy.

To measure the importance of the various kinds of information on a package we use Photoshop to

decompose a package into its communication elements. In our online interview we then expose the consumer to each of these elements and have her rate how relevant each line of copy is and how she feels about each of the emotionally-charged

graphic elements on the package. We can then correlate each of these ratings with the overall motivation score of the package to see how much leverage each element has in driving purchase intent.

By putting this data together with the Flow of Attention data we can then show how the consumer's thoughts and emotions flow through the package. The example shown in Figure 3 (using mock data) provides a hypothetical illustration of how research might be used to identify an opportunity for improving the communication impact of a package, so that the consumer sees more quickly the information, both rational and emotional, that is really important to her.

Dynamic role

The important idea here is that the design of effective packaging must take into account the active, dynamic role that the consumer plays in co-creating the meaning of a brand's packaging. The consumer is a search engine who wants to buy. But unlike the simple keyword search engines of the Internet, the consumer search process must be engaged emotionally, rationally and even physically. Designing a package that can really touch the consumer on all three levels is the key to closing the sale. | Q

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Whose need is it anyway?

Need a winning innovation to add to your resume? Your boss likely thinks you do. Sixty-six percent of 2,500 senior executives surveyed in 58 countries consider innovations to be one of their top three priorities, according to a Boston Consulting Group survey, reported by businessweek.com.

In the world of consumer products, successful innovations are only as good as the consumer insight that we as market researchers identify. Now, before we puff out our chests and lay claim to the company's 5 percent increase in revenue due to innovations, realize that to launch a successful innovation there are many moving parts.

The first, and an important part, is to identify the consumer need or the problem to solve. This insight should be at the beginning of any consumer packaged-goods company's (CPG) innovations process. But this does not always happen. Here are some tips on what to do and what not to do when innovating.

Meet a consumer need. Develop real solutions and deliver real benefits. Don't add a wrinkle to a potato chip and call it new-and-improved. Today's consumers are savvy and know better. And just because the CMO or the chief engineer likes the idea doesn't mean you should do it. One Fortune 500 manufacturer launched a product because operations could cut costs out of the system by making use of waste materials. Did the world need this new gadget made from manufacturing by-products? No. The result? Negative ROI. In this case, the new product died in the trial cycle and profits were impacted due to costs to launch the product. Simply put, the new product was not an innovation – something new that offered a benefit to consumers. Instead, it met a corporate need, not a consumer need.

Don't brainstorm too early. It's fun, and you already have a good idea you think will work, but don't jump into brainstorming without

doing the homework first. Ask, "Do we have enough information, or should we do some exploratory research among users?" Know if the problem to solve is widespread or whether potential usage occasions are limited. You may uncover a compelling problem – one that all consumers want solved. However, also ask whether there is another solution

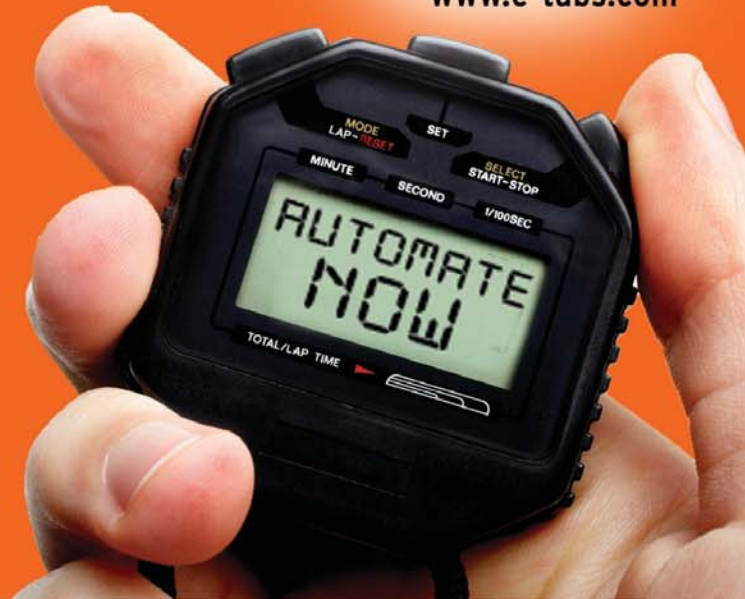
Make sure your product innovations serve consumer interests, not corporate ones



By Barb Gasper

Editor's note: Barb Gasper is president and founder of Focus Research & Strategy Inc., Golden, Colo. She can be reached at 303-249-8948 or at barb@focusrsi.com. To view this article online, enter article ID 20090108 at quirks.com.

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available on the market. Another Fortune 500 company identified and quantified “container leaves rings on tables” as a top problem to solve among a wide variety of consumers. However, when consumers were asked which of the problems they wished a company would solve, “container leaves rings on tables” fell off the list of priorities. It seems coasters, napkins, tablecloths and hot pads all serve as means to avoid leaving rings on tables. Brainstorming on this problem prior to doing the quantita-

tive assessment would have identified innovations that solve problems that already have solutions.

Innovations must fit brand and/or corporate strategy. Another pitfall is developing innovations that don’t fit the corporate or brand strategy. If a product’s core positioning centers around safety, the question to explore is, what safety issues among target consumers are not currently being met in the category? There might be a great new innovation that

is more eco-friendly, tapping into the sustainability trend, but it might not fit the brand’s safety positioning. An appropriate fit with a brand is a key measure in developing effective and compelling innovations.

Get to the problem to solve.

Researchers need to help product and innovation managers peel the onion on benefits and dig down to the real problems. As an example, a soft-drink manufacturer may say an innovation area is portability. True, soft drinks are often consumed on-the-go from a single-serving container. However, if you brainstorm on a broad topic like portability, you will find ideation more difficult. The best ideation sessions start with a clear problem to solve. Sticking with portability, what is the consumer problem? Where does it happen? How often are the usage occasions? Is there an existing solution to the problem? You may find that what really bothers consumers is that when the can is empty, they toss it on the floor of the car and it leaks on the carpet. Unless you identify a specific and compelling problem to solve, ideating on broad areas like portability will likely not lead you to a solution that consumers will buy.

Manage risk; avoid the tallest pygmy. Managing risk is job one for research managers. Companies that do not innovate well incur great risk. Just because you can make something new and innovative doesn’t mean you should. Develop a risk-management research process, keeping the consumer central to your plan. First, mine current information, identify gaps and execute research to identify the consumer insight. Second, build the idea and identify features and benefits that matter most to consumers. Third, develop a rigorous innovation screening test plan and get buy-in from key decision makers. Agree upon stages in the process where the budget required for further innovation development warrants an evaluation. Develop benchmarks and compare your innovation results to other industry scores. Set go/no-go gates in the process and stick to the plan, which is easier said than done when a development manager has a pet idea. That said,

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remember, it's more costly to launch an innovation that is the tallest pygmy – the best of the worst ideas – than it is to throw the idea out early in the developmental stage.

Diversify. The best ideas often originate from people who are not as close to the business as we marketers are. Bring in consumers, retailers, research and development, operations, and outside experts as well as marketers to brainstorm ideas. Get the research and development troops out of the cor-

porate office during the exploratory phase of research. If your challenge is to innovate in the lawn-mower category, get the team riding mowers with parks and golf groundskeepers. Let them listen as home lawn-mower retailers explain what consumers are looking for in a new mower.

Know your research/innovations partner. There are dozens of new and effective methods being developed in the area of exploratory research. Options like mind-mapping,

ethnographic observation, deprivation studies, think-tanks, blog-mining and trend-watching may deliver insights for ideation, or they may not. When you partner with an innovations research firm, ask what works for your test objectives. What is their process, and do they have a proven track record? Don't go with partners who get creative and clever, using you as an experiment. Experience and proven results go a long way.

Manage internal politics. While senior executives will say they support innovation, do they? Is there an innovations and research budget? Is there a management team and culture that is favorable toward innovations? Is there a champion for innovation at the senior level, or even better, a chief innovations officer? Before brand and research managers launch into brainstorming areas for innovations, explore the corporate culture for taking on risk. According to "Management: How to Improve the Bottom Line Through Innovation" an article published in *Executive Management* in December 2008, companies that focus on improving – not just their innovation but also their innovation management – tend to be better overall performers than those firms that simply see the success or failure of an innovation as something best left to chance. The article cites a report from the management consulting firm Arthur D. Little as its source. According to the article, "The reason why some firms are more successful at harnessing the power of innovation is simple – it all comes back to management."

Many forms


Merriam-Webster defines innovation as the introduction of something new. Innovations come in many forms. They can add value, solve a problem or be a new product or service. They can create greater efficiencies in operations, improve quality on the production line or reinvigorate an old, tired brand.

No matter how they are manifested, innovations, when properly formed and thoroughly vetted, can serve as a springboard for company growth. Keeping the above tips in mind will help your firm develop and bring to market the strongest and most viable new ideas. | Q


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A well-developed mystery shopping program remains one of the most effective and affordable methods of gathering operational data about a business. It doesn't matter if you own one restaurant, are a franchisor/area developer, local chain or national powerhouse, the data gathered from this market research method can provide support across multiple areas of your enterprise including operations, marketing, customer satisfaction and policy compliance. For franchisors and area developers, including a provision for mystery shopping in the franchise agreement can institutionalize the program and provide a consistent data-gathering tool that can be used by the franchisor and franchisee alike.

With rising energy costs, all businesses are seeking ways to maximize cost and productivity while protecting and expanding market share. Mystery shopping programs can be a low-cost, high-value investment that enables you to collect critical frontline data.

Unspoken promise

Perhaps nothing is more important to a business than its reputation. At every customer touchpoint you have the opportunity to build brand equity and develop customer loyalty. From the neighborhood diner to national chain, every restaurant makes an unspoken promise through its menu, décor and service quality. Consistent execution of quality and service is a non-negotiable component of success and ultimately customers will come to gauge each restaurant's brand in these areas. For businesses with more than one location it is critical to maintain consistency among multiple stores.

Utilizing a consistent series of anonymous on-site evaluations, data can be collected to detail the actual guest experience versus the expected guest experience based on your guidelines, policies and philosophies. Field evaluators gather objective information areas such as:

- telephone skills/hostess service;
- guest experience;
- food quality and temperature;
- facility condition;
- cleanliness of restroom facilities;
- parking-lot condition;
- dress code compliance;
- visibility and interaction of management staff; and
- compliance with franchise agreement.

Mystery shopping for the food-service industry



By David Agius

Editor's note: David Agius is owner of The Sentry Marketing Group, a Frisco, Texas, consulting firm. He can be reached at 214-295-2615 or at dave@sentrymarketing.com. To view this article online, enter article ID 20090109 at quirks.com.

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As a brand protection device, your mystery shopping program can function both as a coaching tool and a quality assurance monitor. When the project is specifically designed for your business, you can gain information about how closely policies, guidelines and standards are executed. With a mystery shopping program you can quickly learn:

1. If focus items, such as seasonal or daily specials are being presented to each guest.

2. How skilled frontline employees are at handling guests.
3. Whether the overall operating philosophy is being practiced.

As the data from completed evaluations accumulates, you can use the analysis tools included with most mystery shopping programs to track key performance areas, identify trends and uncover areas of strengths and weaknesses.

For the multiunit operator, in both the franchise and non-franchise environments, mystery shopping provides

a consistent method of collecting data that can be used to create comparison and performance reports. These reports can range from comparison of overall evaluation scores to trend analysis and tracking of key performance criteria. Reports commonly track data on a rolling 12-month, month-to-day and/or year-to-date basis.

In a franchise environment, the presence of an established mystery shopping program provides value for the franchisee as well as the franchisor/area developer. When these programs are implemented early in the life cycle of the business, they tend to become an accepted part of the brand culture and a tool that has value for all stakeholders. An established program can be used as a way of differentiating a franchisor from their competitors. From a franchisee perspective, it:

- offers access to an established program;
- provides a tool for employee motivation, coaching and recognition;
- begins data collection from the time a unit is open for business;
- gives access to best practices from other business units; and
- sets a baseline to compare unit performance to established indexes.

By including provisions for on-site evaluations in the franchise agreement, you establish the presence of a mystery shopping program from the onset as your way of doing business. The program becomes simply one of the many components that you have in place to help them succeed. Franchisees gain value because they do not have to spend any of their resources developing a similar program. In addition, performance data accumulates from the first day a unit is open for business. For all operators, the result over time is a robust base of performance data that can be used to sharpen staff performance, track progress of training, marketing and similar initiatives as well as quickly identify potential areas for improvement.

Across multiple areas

Your mystery shopping program should be both affordable and provide a high return on investment. A well-executed mystery shopping program will supply you with data that can be used across multiple areas

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of your business. For example, your program should support your operations department by supplementing the on-site visits of your field staff with the structured operational review provided by the mystery shopping evaluation form. In this role, the program becomes an extra set of eyes and ears for your organization. For the franchise operation the program can provide valuable insight and data to all the members of your team who interface with individual franchisees. The mystery shopping reports can provide early detection of possible process or policy issues as well as identify best practices that can be shared with your management team across all locations.

For those in marketing, your mystery shopping program can provide specific feedback about the presence of marketing materials, if the staff is consistently highlighting the sale of focus items and the condition of menus, menu boards and other signage. The mystery shopping program can also be used to identify and reward star performers. You may find that some of your current food and beverage purveyors may help defray the cost of your program if you

highlight their product as part of the monthly shopping scenario.

Mystery shopping programs that are tied to employee incentives can provide a powerful motivator for workers to maintain consistent service levels. Bonuses and rewards can be linked to program results, encouraging employees to embrace operational policies and procedures. The data from the reports can also be a key tool in training and coaching. You can quickly take action on areas requiring improvement and monitor the progress over time with objective data.

Reviewing the purchase receipts submitted as a requirement of your program may assist in accounting compliance as well as discouraging the giving away of items without properly accounting for them.

New life

The Internet has breathed new life into the mystery shopping industry. Field evaluators can complete and upload reports in 24 hours. The almost instantaneous feedback from an on-site operational assessment can alert you to potential problems which can be

acted upon immediately. And, over the long-term, the consistent collection of data provides a series of impressions. You can identify trends that can be addressed with training, one-on-one coaching or counseling.

Industry giants like McDonalds, Starbucks and Chipotle have long-standing programs. Both Brinker International (Chili's/On the Border) and Carlson Restaurants Worldwide (T.G.I. Friday's) have programs in place, as do regional chains such as Wingstop, IHOP and Sonic.

Program frequency can be adjusted to meet your individual needs but even one visit per month will return future dividends. The information that you gather using this technique cannot be captured using comment cards or similar devices. In fact, the companies referred to in the preceding paragraph use the data from both mystery shopping and customer feedback to drive their decision-making process. The blend of objective reporting (mystery shopping) and subjective feedback (from guests) can be an effective way to keep in touch with both guest expectations and the quality of the guest experience. | Q



When every penny counts, a customer's experience matters more than ever. Mystery shopping is the powerful management tool that measures how well a company is delivering on its brand promise. Mystery shopping data and the consultative expertise MSPA member companies provide can enable their clients to maximize customer interactions where they have the greatest impact. By enabling a company to align its performance with its highest expectations, mystery shopping can deliver a powerful boost to the bottom line.

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The study also identifies new segments of gamers – highlighting groups such as Social Troopers, Family 3.0, Weekend Warriors and Traditional Core – in order to specifically define usage habits, purchasing patterns and other aspects of the lives of video gamers. The segments also delve into media consumption, identify decision makers within households and generally break down the lifestyle interests of each group in order to define their value as consumers.

“This study looks at how video games and video gamers are breaking away from stereotypes that have been in place since Pong,” says Roy Bahat, general manager of IGN Entertainment. “This was more than a quantitative survey – we visited gamers in their homes and received feedback about how video games influence, enhance and affect their daily lives, familial relationships and friendships.”

So, are you game? According to the study, people from a diverse demographic set would answer this question in the affirmative. Fifty-five percent of gamers polled were married, 48 percent have kids, and new gamers (those who have started playing video games in the past two years) are 32 years old on average.

Both quantitative and qualitative evidence points to the increasingly social nature of video games. According to the research, more than 75 percent of video gamers play games with other people either online or in person. In addition, more than 47 percent of people living in gaming households said that video games were a fun way to interact with other family members. The study also indicates that gamers are actually more social and more active than non-gamers: Gamers were twice as likely to go out on dates as non-gamers in a given month. In addition, gamers were 13 percent more likely to go out to a movie, 11 percent more likely to play sports and 9 percent more likely to go out with friends than non-gamers.

Gamers have not only become more social, but they have also surpassed non-gamers as pop culture influencers, especially in terms of television and movies. According to the data, 37 percent of gamers said friends and family relied upon them to stay up-to-date about movies, TV shows and the latest entertainment news, compared to only 22 percent for non-gamers. The data also points to gamers as early adopters of technology and gadgets, with 39 percent indicating that friends and family rely upon them to stay up-to-date about the latest technology.

Gamers have evolved not only in terms of demographics and activities, but also as consumers. In terms of hard dollars, the average gaming household income (\$79,000) is notably higher than that of non-gaming households (\$54,000), but the value of the gamer as a marketing target can be seen in a variety of ways. As early adopters, gamers have also shown a willingness to pay extra for the latest and greatest. Gamers are twice as likely as non-gamers to buy a product featuring new technology, even if they are aware that there are still bugs. Gamers are also twice as likely as non-gamers to pay a premium for the newest technology on the market. Gamers also consume media in different ways than non-gamers, with hard-core gamers spending – per week – five more hours on the Internet, two more hours watching television and two more hours listening to music than non-gamers. For more information visit www.ipsos-na.com.

Shaken consumers want to spread bank assets around

Personal insecurity was an undercurrent of third-quarter interviews in the National Consumer Banking Study conducted in September by Omaha, Neb., research company The MSR Group. Twelve percent of U.S. consumers reported they are likely to move existing accounts to a different financial institution within the next 12 months. Sixteen percent cite market uncertainties and the stability of their bank as a reason to move accounts, and another 9 percent say they don't

want all their money in one bank.

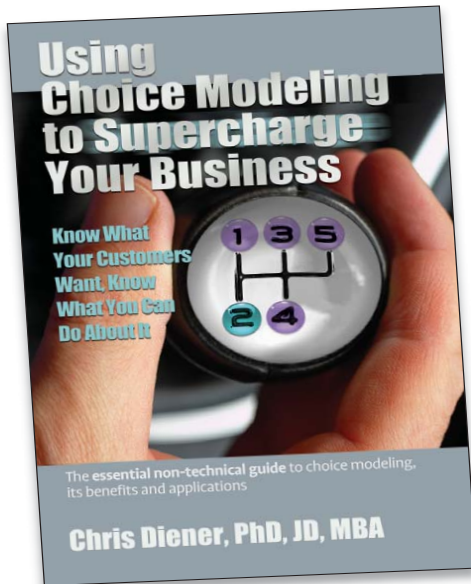
According to the 2008 Independent Community Bankers of America (ICBA) Community Bank Technology Survey, 89 percent of community banks maintain an Internet banking site that allows their customers to conduct banking transactions, up 6 percent from 2006. Consumer use of online banking has increased 11 percent during this same period of time. However, between first-quarter 2007 and third-quarter 2008, customer satisfaction scores related to online banking have declined an average of 4 percent.

The reason for the disparity may come as a surprise to many banks: online support. The MSR Group's National Consumer Banking Survey consistently shows that customers find a lack of online support to be a major dissatisfier. Yet results of the ICBA study show that 56 percent of banks have no interest in offering a customer service FAQ area on their Web site, and 84 percent have no interest in offering live chats with customer service representatives.

According to a study conducted for the ICBA, mobile banking tops the list of technologies banks plan to implement in the next 24 months, while another three are related to online banking services. Sixteen percent of consumers nationally have considered switching to another bank but have not done so. When asked why they decided to stay, the hassle of switching was the most commonly-cited reason. Having multiple connections to a single bank, in the form of Internet banking, automatic deposit and bill-pay setup, makes moving accounts more difficult. While multiple connections to a bank will delay defection for a period of time, there will come a point when frustration with multiple facets actually encourages leaving. Inconvenience is trumped by wide-ranging dissatisfaction.

Other findings from survey include: When compared to other financial institutions, slightly more than half (only 56 percent) of consumers rate service at their bank as excellent; only half of all customers rate the convenience of branch hours as excellent; nearly two in every 10

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customers say they waited 5 minutes or longer during their last branch visit – a wait most of these customers consider unreasonable; while use of online banking continues to increase, ratings of online support services is on a downward trend; consumer ratings of ATMs have declined an average of 3.5 index points since first quarter 2007; two in five consumers reporting to be very or somewhat likely to switch banks would do so simply for lower fees and/or more favorable interest rates. For more information visit www.themsgroup.com.

Age is just a number, especially online

Marketers targeting consumers based on their chronological age instead of on their engagement and participation in youth culture may be missing out on 25–34-year-olds, a group often overlooked as part of the youth market, according to the Golden Age of Youth, a study from Viacom Brand Solutions International (VBSI), a London brand-focused sales house.

Kevin Razvi, executive vice president and managing director of VBSI, says, “People are trying to stay younger for longer ... 25–34-year-olds are continuing to consume music, gaming and the Internet and are enjoying the pursuits of their younger years. We need to rethink what ‘youth’ actually means and how to approach this constantly-evolving group of people.”

Though those age 25–34 remain youthful, there are some important differences among them and their younger and older counterparts. The study identified three distinct stages of youth: Discovery (16–19 years old), Experimentation (20–24 years old) and Golden (25–34 years old). Golden are happier and more confident/secure, and they gravitate toward premium, understated and often luxurious brands and experiences to affirm their identity. In contrast, those in the Discovery group are focused on material gain and employ brands to define their identity.

Golden are most likely to agree that they are happy or content with their personal life and are 24 percent

more likely than teens to agree that they love life. More than 80 percent of the global respondents say that the 20s should be about exploring life and having fun.

Teens feel pressured to figure out who they are and where they are going and are 23 percent more likely than those 25–34 to agree that their life is more stressful. This is particularly true in Europe and in the U.S. Seventeen percent of the global sample who said they had made some major decisions in life too early were the most unhappy and stressed group of 25–34-year-olds among all the respondents.

Traditional adult brands can adopt a more youthful tone to avoid being seen as irrelevant, according to the study. Twenty-three percent of the 25–34-year-old global sample feels that financial institutions are aimed at those older than they are, though youthful brands have a new market beyond the core teenage target. In the traditionally-young area of technology, one-third of 25–34-year-olds agree they’re really interested in new technology, and 66 percent say that they take the time to learn how things work to get the most out of them.

The study also found that from a global perspective, 25 is the ideal age overall. Other key findings include: Respondents age 25–34 who are married are significantly more likely to be happy (66 percent) compared to singles (30 percent); only 36 percent of Europeans and 39 percent of Asians age 25–34 feel like they’re struggling with their current financial situation compared to 55 percent in Latin America and 51 percent in America; 71 percent of 25–34-year-olds agree they feel comfortable with who they are, and those who feel most settled with their identity live in Mexico (84 percent), India (83 percent) and Saudi Arabia (82 percent); those who are least comfortable are the Japanese (26 percent); 35 percent of Europeans would find it strange if someone got married in their early 20s compared to only 20 percent of Americans and 18 percent of Japanese; in general, 78 percent of 25–34-year-olds are optimistic about their future, and

this is highest in Latin America (85 percent), lowest in Asia (67 percent) and the U.S. (72 percent); 62 percent of Latin Americans felt they made life decisions too early compared to only 24 percent Japanese, 37 percent of Europeans and 50 percent of Americans. For more information visit www.viacom-brandsolutions.co.uk.

Consumer misconceptions can cause risky online behavior

Eighty-two percent of consumers are concerned about their credit card numbers being stolen online, while 72 percent are concerned that their online behaviors are being tracked and profiled by companies. Although 68 percent of consumers have provided personal information in order to access a Web site, 53 percent are uncomfortable with Internet companies using their e-mail content or browsing history to send relevant ads, and 54 percent are uncomfortable with third parties collecting information about their online behavior, according to a poll released by the Consumer Reports National Research Center, Yonkers, N.Y.

The poll revealed that 93 percent of Americans think Internet companies should always ask for permission before using personal information, and 72 percent want the right to opt out when companies track their online behavior. Thirty-five percent use alternate e-mail addresses to avoid providing real information. Twenty-six percent have used software that hides their identity, and 23 percent have provided fake information to access a Web site.

Consumers are aware that information about their surfing habits is being collected online, but many are not aware of what companies are able to do with their information. Among the other findings of the poll, 61 percent are confident that what they do online is private and not shared without their permission. Fifty-seven percent incorrectly believe that companies must identify themselves and indicate why they are collecting data and whether they intend to share it with other organizations, and 48 percent incorrectly believe their con-

sent is required for companies to use the personal information they collect from online activities. Additionally, 43 percent incorrectly believe a court order is required to monitor activities online. For more information visit www.consumerreports.org.

Top trends for 2009: take control, keep it simple

Around the world, people have been shaken into uncertainty by the economic crisis. But the November U.S. presidential election has given rise to feelings of hope and optimism. Chicago research company Mintel sees five major ways that consumers will adapt and make the best of 2009. As a backlash against the fast pace of the modern world, people will try to take greater control of their lives and find pleasure in the simple things. Faced with financial insecurity, shoppers will seek out businesses and products they feel they can trust. And although they will cut back on spending, people will continue to treat themselves to little luxuries and fun activities.

Over the years, people have become more confident and demanding about how they live their lives and spend their money. Even as a recession hits, they'll want to stay in control of their choices wherever they can. Consumers will seek out products and services that give them exactly what they want, when they want it, especially as their budgets tighten. And the Internet will be key. It shows people every option available and gives them the power to demand more while also allowing them to influence others through user reviews and feedback.

Manufacturers will respond with products that suit people's specific needs and lifestyles. "Those companies that give consumers precisely what they want or give them the freedom to customize their purchases will do well. Companies that fail to do this will see consumers walk away," says Joan Holleran, director of research at Mintel. In addition, Baby Boomers will be of particular interest to businesses. Companies will move beyond traditional "old age" products and services to ones that embrace the active, healthy lifestyles

of many older consumers.

Faced with fast-paced modern life, many people will value convenience and simplicity. As people take control of their everyday lives, they will also demand that companies communicate with them honestly and openly. From understandable ingredients to clear company practices, consumers will want transparency when it comes to the products they buy. Old-fashioned skills such as cooking at home, sewing and gardening will become increasingly popular. As an added benefit, these home-based activities will also help people stretch their budgets further.

As consumers look for more authentic, easy-to-understand products, companies will market their brands in a simpler, more direct way. Fresh, clean and pure will become essential values, as manufacturers focus on clear ingredient labels and product positioning. Additionally, with people staying in their homes to save money, companies will create better products for dining, relaxing and entertaining at home.

Today's consumers have high standards and will demand value for money, as well as consistently high levels of quality, safety and service. Crumbling economic markets, food scares and toy safety problems have fueled an era of doubt and insecurity. And so in the coming year, people will seek out trusting, open relationships wherever they can. People will want to know all about the products they buy, from where they were sourced to how they were manufactured. Because of this, people will cling to the long-standing, nostalgic brands they know and love, looking for products with a real sense of familiarity.

For many companies, especially those in the finance sector, the road to rebuilding trust with consumers will be long and difficult. But it will be a priority. Manufacturers will need to back up their words with actions and conduct business in a more open, honest way. Reassuring consumers that they are acting in the customers' best interest will become a primary concern for businesses. Also, as companies see shoppers

sticking to already-familiar products, long-standing brands will move into new markets to exploit their position as trustworthy companies.

As purse strings tighten, consumers will look for every possible way to make their pennies stretch further. For example, people will trade down to cheaper store brands, eat out less or simply choose not to update their wardrobes. But everyone will still crave a little treat now and again. The result? Shoppers will likely trade down to budget-friendly solutions to save money. But occasionally, they will also need to indulge in small, affordable luxuries, like premium chocolate, designer sunglasses or a favorite moisturizer.

As consumers split between the low and high end of the market, manufacturers will invariably follow suit. Many companies will start to focus on value brands, but there will still be room for products that bring a little luxury to the everyday. "The middle market will increasingly be squeezed and is going to have to prove its worth when faced with competition from newly-improved basic lines," says Holleran. Beyond this, many companies will position their products as a more-affordable alternative to going out. For example, expect premium ready-meals that give a restaurant experience at home or beauty products that bring a spa-like feel to the bathroom.

In tougher times, people not only crave life's little luxuries, they also need to enjoy themselves. Small, playful distractions such as neon makeup, fun-to-eat food or interactive stores like Apple will gain popularity as people look to let their hair down and have some fun.

Companies will focus on products and experiences that are light-hearted, and those that offer real entertainment will have a significant competitive advantage. Beyond this, manufacturers will launch products specifically designed to enhance people's moods in unique ways. From food and beauty to household cleaners, Mintel expects to see a widening range of products that soothe, energize or simply lift the spirits. For more information visit www.mintel.com.

Product and Service Update

continued from page 12

MarketTools launches online research platform

MarketTools Inc., a San Francisco research company, has launched MarketTools.com, an on-demand research solution designed to integrate survey tools, online panels and communities, and research practices to support marketers and market research professionals. The MarketTools.com Web platform is designed to serve as a centralized research hub providing direct access to MarketTools' portfolio of products without investing in stand-alone software, hardware or integration services.

The initial solutions accessible through MarketTools.com include: Research Manager, MarketTools' productivity center designed to offer a search function for researchers to locate exact questions within a survey; Survey Manager, using MarketTools' zTelligence platform, designed for survey creation and functionality to give users the ability to import a text-based survey via a one-step wizard; and TrueSample Manager, a data quality solution designed to prevent survey fraud

and duplication. For more information visit www.markettools.com.

New options for mobile brand impact surveys

New York advertising company Millennial Media has released enhanced brand impact survey targeting capabilities, which are designed to offer more options for targeting and to allow third-party brand impact studies to be conducted according to advertising research industry standards.

The program is designed to allow third-party digital marketing research companies to recruit control and exposed cells, whereas mobile ad effectiveness measurement generally required recruiting the control (or unexposed) group prior to campaign launch in order to ensure a clean sample. This methodology was necessary due to the limitations associated with uniquely identifying a user's exposure to an advertisement.

Millennial Media's enhancements are intended to match the standards for online brand impact studies in which unique identifiers are used to ensure that the control group is recruited using the same targeting parameters

as the exposed group, but never exposed to the brand campaign. This methodology is designed to remove potential biases that could occur from the delay between collecting the control and exposed groups. For more information visit www.millennialmedia.com.

Arbitron unveils reliability calculators for diary and PPM data

New York research company Arbitron Inc. has released two reliability calculators for diary and PPM radio estimates. A new feature of eBook is designed to allow users of Arbitron radio ratings, whether diary or PPM-based, to gauge the estimated statistical reliability of audience estimates for published demos and dayparts. The PPM GRP Reliability Calculator estimates the margin of error for gross rating points (GRPs) of radio advertising schedules in PPM markets.

Arbitron has added a standard error calculator to the Audience Estimates Reliability section of its Web-based eBook for every market, which is designed to estimate the standard error for any Arbitron audience rating published in eBook. A subscriber can select the parameters of the rating they wish to evaluate (e.g. geography, estimate type, demographic and daypart), and the calculator estimates the standard error for that rating. This standard error then can be used to create a confidence interval around the rating.

The GRP Reliability Calculator is a new software program designed to enable clients to estimate the reliability of GRPs for a schedule in PPM markets. The PPM GRP Reliability Calculator provides an estimate of the margin of error (confidence interval) around GRP estimates of radio schedules. The user selects the desired confidence interval (90 percent is the default value),

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the market(s) and the schedule specifications (e.g., target demographic, the daypart in which the spots are scheduled, the number of months, stations, spots and GRPs for the schedule), and the PPM GRP Reliability Calculator estimates the margin of error and confidence interval for the schedule of GRPs. For more information visit www.arbitron.com/ppm.

Briefly

Star Data Systems, a Jupiter, Fla., research company, has partnered with CMS Research, Toledo, Ohio, to offer interactive voice response (IVR) surveys to Star Data clients. The arrangement provides for IVR data and voice files to be automatically transferred to Star Data's online dashboard so that CMS clients can log on and see tabulations of their data and listen to recorded comments made by respondents. Star Data Systems will offer IVR surveys alongside traditional CATI projects, online surveys and paper questionnaires. For more information visit www.star-datasytems.com.

Business networking site LinkedIn, Mountain View, Calif., has launched a service designed to help market researchers and professional investors conduct research using its database. LinkedIn Surveys lets clients search on any combination of qualifications, company, industry, title, expertise and keywords, to profile industry experts who meet specific criteria. For more information visit www.linkedin.com.

Boston research company Eidetics has debuted Provenance, an interactive tool designed to provide pharmaceutical brand teams and clinical researchers with a panoramic view of data, utilizing data mining techniques and Bayesian networks. The Provenance business intelligence and decision-modeling tool is designed to allow users to visu-

alize data relationships; answer product positioning and market-size questions in real time; and provide the capability to do real-time scenario modeling for senior management. For more information visit www.eidetics.com.

Dallas research company e-Rewards Inc. has launched Veracity360, its quality management system designed to enable an expanded focus on broader aspects of quality and ensure that its online respondents meet clients' quality standards. The system encompasses by-invitation-only enrollment, ID validation, duplicate elimination, profile validation and overall survey performance, which incorporates a client feedback loop. For more information visit www.e-rewardsresearch.com.

TruMedia Technologies, a Tampa, Fla., research company, has launched iTRI, an audience measurement solution designed for experiencing and demonstrating proactive advertising and face-based audience measurement firsthand. ITRI software is designed to be installed on a PC and work with any USB camera. The application has three modes, generating up to 12 hours of audience data at a time. The application also features TruMedia's content-based reporting and advertising capabilities based on the viewer's gender using pre-loaded, fixed ads. For more information visit www.trumedia.com.

Evanston, Ill.-based publisher Manufacturers' News Inc. has expanded its database to include 600,000 additional businesses, organizations and institutions. It now encompasses companies in various fields, including health care, finance, government and transportation, and provides 2,300,000 related executive contact names. For more information visit www.manufacturersnews.com.

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Research Industry News

continued from page 14

Providence, R.I.; and Orlando, Fla. – are scheduled to commercialize with the release of the September 2010 PPM survey report in October. Previously, these five markets were scheduled to commercialize with the release of the June 2010 PPM survey report. The final diary-based audience report in these four markets will now be for the Spring 2010 survey (April 1-June 23.)

New York researcher **The Nielsen Company** and **Integrated Media Measurement Inc.** (IMMI), a San Mateo, Calif., research company, have suspended their out-of-home television viewing measurement service. The companies cited difficult economic times, which had led to “limited economic support” for the service. The partners have not ruled out restarting the service sometime in the future, and Nielsen says it will “continue to work on out-of-home measurement solutions, including efforts with IMMI.”

Media-Screen, a San Francisco research company, has changed its name to **Netpop Research LLC**. The Netpop Research Web site (www.netpopresearch.com) has also been updated.

Acquisitions/transactions

New York researcher **The Nielsen Company** and London research company **WPP** have signed an agreement to swap certain assets. Nielsen will own 100 percent of AGBNielsen Media Research, an international television audience media measurement business, by acquiring the 50 percent held by WPP. In return, Nielsen will transfer to WPP: SRDS, the provider of media rates and data to the advertising industry; PERQ/HCI, which provides a range of services for media planning in the field of health care; and its 11 percent share in IBOPE PDM, IBOPE LA and IMI.com, all part of the IBOPE Group, a Brazil-based research firm, of which WPP previously held a 31 percent stake. These assets will be added to The Kantar Group, WPP’s information, insight and consultancy division.

Little Rock, Ark., research company **Axciom Corporation** has acquired **Quinetix LLC**, a Rochester, N.Y., research company, after having partnered with Quinetix for more than five years.

Alliances/strategic partnerships

Mountain View, Calif.-based **Google** and London research company **WPP** have partnered to fund a grant program to support research into how online media influences consumer behavior, attitudes and decision-making. WPP and Google will contribute up to \$4.6 million over three years to endow the Google and WPP Marketing Research Awards Program.

The program will be overseen by Professor John Quelch, senior associate dean of Harvard Business School and a non-executive director of WPP; Hal Varian, Google’s chief economist; and Glen Urban, former dean of the Sloan School of Management at the Massachusetts Institute of Technology. The committee will work with WPP and Google to decide which grant proposals will be funded and ensure the integrity, delivery and impact of the research. In the first year, the Google and WPP Marketing Research Awards Program hopes to award up to 12 grants.

TruMedia Technologies, a Tampa, Fla., research company, has partnered with **Samsung Electronics Corporation**, Seoul, South Korea. TruMedia’s iCapture PROactive Merchandising (PROM) solution for digital screens has been integrated into and will be sold together with Samsung’s MagicInfo player-enabled CX Series of professional large-format displays. TruMedia’s iCapture PROM connects with Samsung’s MagicInfo Player to select ads and other content based on the viewing audience’s size and demographics. In addition to software integration, Samsung is licensed to manufacture TruMedia’s iCapture AlliO Hardware, a sensor and video-processing device, which Samsung will market with its PROM-enabled screens.

Star Data Systems, a Jupiter, Fla., research company, has partnered

with **CMS Research**, Toledo, Ohio, to offer interactive voice response (IVR) surveys to Star Data clients. In turn, CMS will offer tabs and online dashboard capabilities for IVR data collection studies to consulting and retail clients.

Association/organization news

The Council for Marketing and Opinion Research (CMOR), Glastonbury, Conn., and **The Marketing Research Association** (MRA), New York, have merged their memberships in an attempt to remedy the concern of industry members that there are too many associations partitioning the services needed and increasing the cost of companies to receive the professional support they need. The new body will be known as MRA, and CMOR services will be labeled as such with the clarification that they are a division of MRA. Services that CMOR previously charged for, such as the compliance guide and respondent cooperation studies, will become core member benefits.

The Qualitative Research Consultants Association, St. Paul, Minn., has appointed its new board of directors: Manuela Fletcher, Andrew Fletcher Consulting Ltd.; Susan Thornhill, Thornhill Associates; Foster Winter, Sigma: Research Management Group; Chris Kann, CSK Marketing Inc.; Abby Leafe, Customer Strategy Consulting; Nancy Hardwick, Hardwick Research; Ilka Kuhagen, IKM; Nancy Ulrich, Ulrich Research Services; and Sharon Livingston, The Livingston Group.

The Council of American Survey Research Organizations, Port Jefferson, N.Y., has elected its board officers for 2009: Kevin Menk, Strategic Resource Partners L.L.C.; Andrew Morrison, Market Strategies Inc.; Robin B. Arnold, The Gilmore Research Group; Roseanne Luth, Luth Research; William J. “Jay” Wilson, Cambiar L.L.C.; Michael Brereton, Maritz Inc.; and Craig Stevens, e-Rewards Inc.

Awards/rankings

Chicago research company SPSS Inc.

has honored **Experian**, a Dublin, Ireland, credit information company, and **MetLife**, a New York insurance company, as recipients of its fifth-annual Insight Awards presented at the 2008 Directions User Conference in Las Vegas. The Insight Awards honor SPSS customers on their use of a predictive analytics solution that has helped to align analytics, IT architecture and business process to create sustainable innovation.

The Pharmaceutical Marketing Research Group (PMRG), Gainesville, Fla., has honored **Roger Green** with The RR Fordyce Award. The award recognizes his work in founding Roger Green and Associates; his contributions as president to the growth of Dresher, Pa., research company TVG; his role as a research innovator through the development of dynamic practice simulation; and his commitment to the growth of PMRG, where he served as president over the past year.

Decision Analyst Inc., an Arlington, Texas, research company, has received a Best of Bull's-Eye award from Minneapolis retailer Target Corp. for its role as one of Target's top vendors. Decision Analyst has conducted satisfaction tracking studies for Target for several years.

Evansville, Ind., research company **ARSGroup** has received a Supplier of the Year Award and an Excellence Award from Cincinnati-based Procter & Gamble Co. for being one of Procter & Gamble's top-performing suppliers.

Dallas research company **e-Rewards Inc.** has received a 2008 Momentum Award for National Employment Growth from the Dallas Regional Chamber as a result of e-Rewards' increase over the last year.

Angus Reid, CEO of Angus Reid Strategies, a Vancouver, B.C., research company, has received a Doctor of Laws, honoris causa, from Carleton University in Ottawa. He was recognized for his contribution to the field of public opinion research.

San Francisco research company

MarketTools Inc. has been named by *Research Business Report* as the winner of the 2008 High Impact Market Research Project Award. The award recognizes MarketTools' TrueSample SurveyScore, a process designed to provide an objective measure of survey quality and engagement.

New accounts/projects

AirTran Airways, Orlando, Fla., has invited its AirTran A+ Rewards members to enroll in the e-Rewards Opinion Panel, a panel developed and managed by Dallas research company **e-Rewards**. Invitees who join the panel will be able to earn A+ credits by completing online market research surveys.

EYE, a New York mall media company, has signed an agreement with **Arbitron Custom Research**, New York, to measure the effectiveness of mall-based advertisements and the psychographics of EYE mall shoppers. Arbitron will conduct on-site mall surveys in multiple markets across the U.S.

Omaha, Neb., research company **infoGROUP** has chosen **Maponics Neighborhood Boundaries**, a Norwich, Vt., mapping and data company, to power its neighborhood-based selection list.

TV ratings company **TAM Ireland** has reappointed **AGB Nielsen Media Research** to conduct audience measurement services in the country. The contract will run for the next five years, coming into effect when the current contract expires in September 2010.

Redlands, Calif., geographic mapping software company **ESRI** has been selected for its services by the **City of North Las Vegas Fire Department**, which will use geographic information system (GIS) software to help prevent emergencies from occurring, reduce their consequences and provide first-responders with the information while deploying to an emergency.

Separately, the **U.S. Environmental Protection Agency** has renewed its five-year enterprise license agreement (ELA) with ESRI to

continue its use of GIS for nationwide service.

Additionally, **Southwest Florida Water Management District** has signed an ELA with ESRI to support the expansion of an accessible GIS that provides employees with the data and tools to perform their work. The agreement also supports the technological advancement of two information systems built on ArcGIS Server.

Nippon Research Center (NRC), Tokyo, has selected **Confirmit**, an Oslo, Norway, research software company, to conduct its Web-based survey projects, clean and process survey data and provide online reporting access to its clients. NRC will use Confirmit for domestic and international studies that are conducted across its online panel.

Cumulus Media Inc., an Atlanta radio company, has chosen New York researcher **The Nielsen Company** to provide audience measurement and radio ratings in 50 small- and mid-sized U.S. markets. **Clear Channel Radio**, San Antonio, will also subscribe to the syndicated service in 17 of the markets in which the service will be offered.

New companies/new divisions/relocations/expansions

Jon Last, former vice president for Conde Nast's Golf Digest Publications, has launched a full-service marketing research company, **Sports and Leisure Research Group**, at 445 Hamilton Ave., Suite 1102, White Plains, N.Y., 10601. Phone 914-358-3558. Joining Last will be Peter Van Brunt and Michael Mermelstein, both of whom will continue operating their current businesses while also working with Sports and Leisure Research Group.

The Photizo Group, a Versailles, Ky., research company, has launched a new subsidiary. **The Woodford Group**, based in Warwick, N.Y., will focus on providing the financial community with business intelligence and analysis of the printing and imaging markets.

TNS Compete, the Boston ana-

lytics division of TNS, has launched its retail and consumer products practice. The retail and consumer products practice is an extension of TNS Retail Forward and TNS Sorensen.

Montreal research company **Voxco** has created the **Voxco Solutions Group**, intended to join the four first-line service teams: professional services, project management, training and technical support. Emmanuel Greciet has been promoted to the lead this group.

Research company earnings/ financial news

New York-based **The Nielsen Company** announced its financial results for the third quarter and the nine months ended September 30, 2008. Reported revenues for the third quarter of 2008 were \$1,260 million, an increase of 6 percent over reported revenues for the third quarter of 2007 of \$1,188 million. Excluding the impact of currency fluctuations, revenues for the quarter increased 3 percent. Reported revenues for the nine months ended September 30, 2008 were \$3,778 million, an increase of 10 percent over reported revenues for the nine months ended September 30, 2007 of \$3,429 million. Excluding the impact of currency fluctuations, revenues for the nine months ended September 30, 2008 increased 6 percent.

Reported operating income for the third quarter of 2008 was \$124 million, compared to \$77 million for the third quarter of 2007. For the nine months ended September 30, 2008, reported operating income was \$408 million, compared to \$233 million for the nine months ended September 30, 2007.

IMS Health, Norwalk, Conn., announced third-quarter 2008 revenue of \$573.7 million, up 6 percent or 3 percent year-over-year on a constant-dollar basis. Net income and earnings per share (EPS) grew 33 percent and 41 percent, respectively, in the quarter. After adjusting for certain items, net income rose 11 percent and EPS was up 19 percent.

Operating income in the third quarter of 2008 was \$124.0 million, up 6 percent or 1 percent constant dollar year-over-year.

Net income on a GAAP basis was

\$75.9 million, compared with \$57.1 million in the year-earlier quarter, an increase of 33 percent. When adjusted for the items above, net income on a non-GAAP basis for the 2008 third quarter would have been \$79.4 million, compared with \$71.6 million in the year-earlier quarter.

For the first nine months of 2008, revenues were \$1,748.6 million, up 10 percent or 4 percent constant dollar year-over-year. Operating income for the first nine months of 2008 was \$371.7 million, up 7 percent on a reported basis and flat constant dollar, compared with \$346.3 million in the year-earlier period. Net income on a GAAP basis was \$212.8 million, compared with \$216.1 million in the first nine months of 2007.

London-based **Kadence Group** announced results of its 2008-2009 financial year, with first-quarter revenue up 68 percent on the same period last year. Strong growth across all the company's offices in the U.K., Asia-Pacific and India, in addition to the U.S., pushed first-quarter revenue to more than \$5 million.

The company attributes most of the growth to additional business from its existing client base. In particular, it pointed to notable interest from the agricultural sector in the U.S., technology in the U.K. and financial markets in Asia.

Rochester, N.Y.-based **Harris Interactive** reported a first-quarter loss of \$2.3 million, compared with a profit of \$1.1 million a year ago, which it attributes to deepening economic turbulence in the U.S. combined with the anticipated decline in its health care revenue. Revenue fell 9 percent to \$50.3 million while operating loss was \$3.2 million, compared with an operating profit of \$1.6 million last year.

In addition, the company said it will record a \$1.7 million second-quarter charge related to the appointment of new CEO Kimberly Till and a reduction of 27 U.S. jobs.

Reston, Va.-based **comScore** reported a 37 percent third-quarter revenue increase to \$30.7 million. Net income declined 85 percent from \$3.6 million to \$600,000 but rose 24

percent to \$5.7 million on an adjusted basis. Excluding the impact of the M:Metrics acquisition and transition-related costs, free cash flow was approximately \$4.0 million. The firm says it added 32 new customers during the third quarter of 2008.

Nuremberg, Germany-based **GfK Group** announced third-quarter and year-to-date financial growth. In the first nine months of 2008, organic sales growth rose sharply by 7.2 percent (prior year 5.5 percent) to EUR 883.8 million. Adjusted operating income for the first nine months climbed to EUR 104.3 million (1.7 percent up on the prior year).

GfK reported particularly strong growth in the high-margin retail and technology sector as well as in the growth regions of Central and Eastern Europe, Asia-Pacific and Latin America.

With sales growth in organic terms of 7.2 percent, GfK outstripped its performance on a like-for-like basis (prior year 5.5 percent) and continued the strong sales trend of the first half of the year. Currency effects reduced sales growth by 3.9 percent. Acquisitions increased sales by 2.7 percent. On a cumulative basis, after currency effects and acquisitions, sales rose by 6 percent to a total of EUR 883.8 million. Adjusted operating income amounted to EUR 104.3 million, which represents an increase of 1.7 percent compared with the same period in the prior year. The margin, which reflects the ratio of adjusted operating income to sales, amounted to 11.8 percent in the first nine months of 2008, continuing to rise compared with the half-year figure of 11.3 percent.

In the third quarter of the current year, GfK achieved organic sales growth of 4.8 percent, increasing total sales by 5 percent to EUR 294.1 million. Adjusted operating income amounted to EUR 37.5 million and the margin to 12.7 percent. In the first nine months of 2008, the GfK Group achieved strong accumulated organic sales growth of 7.2 percent. Acquisitions contributed a total of 2.7 percent. Currency effects arising mainly from the revaluation of the euro against the U.S. dollar reduced sales by 3.9 percent.

Names of Note

continued from page 10

member value.

Joyce Rachelson has joined White Plains, N.Y., research company *Ocucom* as director, marketing and sales.

Kadence, a London research company, has promoted **Roberto Ballestas** to call center manager. Kadence has also hired **Tim Kozlowski** as call center supervisor and **Angela Holloway** as a research associate.

Charles Pearson has been promoted to senior vice president, panel excellence, at *Research Now*, London.

Denver research company *iModerate* has named **David Knight** vice president, client development.

Paris-based research company *Ipsos*

has hired **Jim Quilty** as vice president, travel and tourism. Quilty will be based in Ipsos' Vancouver, B.C., office.

Issues & Answers Network Inc., a Virginia Beach, Va., research company, has named **Ellen Gregory** director, new business development.

Phil Cutts has joined *The Economist* as head of research in its advertising marketing division.

Reston, Va., research company *comScore Inc.* has hired **Pat Pellegrini** as vice president, research, for international operations.

TNS US Custom, a division New York research company TNS, has hired **Sam Thayer** as president.

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tors: **Manuela Fletcher**, Andrew Fletcher Consulting Ltd.; **Susan Thornhill**, Thornhill Associates; **Foster Winter**, Sigma: Research Management Group; **Chris Kann**, CSK Marketing Inc.; **Abby Leafe**, Customer Strategy Consulting; **Nancy Hardwick**, Hardwick Research; **Ilka Kuhagen**, IKM; **Nancy Ulrich**, Ulrich Research Services; and **Sharon Livingston**, The Livingston Group.

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Incheck, LLC	38	W1 Research	48
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Trade Talk

continued from page 82

site or contacted a company based on an advertisement or directory listing.

Reading the responses to the open-ended question “What do you like most about *Quirk’s*?” has been a lot of fun. Some of my favorites:

“It’s one of only a few important publications that I read and I have been in the business a long time. Much of what is out there is [expletive deleted]. Quirk’s is good, fills a niche, at least for me.”

“It’s a quick read and practical, not theoretical.”

“It’s fun to read, relevant to current trends and concerns in marketing research, and covers topics often ignored by other marketing publications.”

“I like that I can use Quirk’s as a good reference source for suppliers, techniques, etc.”

“Focused on market research. Across different levels of experience - good pass-along as training information and/or discussion with peers/clients.”

Sometimes contradictory

As I’m sure most of you have experienced in analyzing your own survey data, the responses were sometimes contradictory. For example, about the same number of readers who said they wanted our articles to be more in-depth also said they wanted the articles to be shorter and more concise. Along those lines, we will soon add brief article synopses to the issues, to give time-pressed readers (is there any other kind these days?) a quick way to determine if an article is of interest to them. Starting with this issue, we have also added article ID numbers in the editor’s note accompanying each story to make it easier to find them online.

In terms of dislikes, some respondents said the articles were too basic, some said they were too academic. Interestingly, even though the question was about the magazine in specific, multiple readers made general comments about how they disliked their lack of free time available for reading. Some said that print magazines are “out of step with the times” while others said they like the fact that they can take *Quirk’s* with them “on the plane.”

One of our main editorial goals has always been to keep readers up to date on trends in marketing research, how techniques are being used and how they can be used more effectively. We will continue doing that, adding more case studies of successful research projects, more staff-written overview-type articles and also covering some of the more basic aspects of marketing research as an ongoing way to help educate those who are new to the field.

“Not too stuffy”

Of all the open-ends, the following response, to the question about what the reader likes about *Quirk’s*, struck a chord: *“Very professional. Not too stuffy. Information I can use. Not too gossipy with industry insiders prevailing. Great personal customer service - I love to talk to*

the staff when I have a question or concern. Down-to-earth attitude.”

Those sentiments hit home, as they pretty much sum up how all of us here approach our jobs.

To paraphrase a speech I’ve heard pilots make at the end of a many an airline flight, we know you have a lot of choices when it comes to reading about marketing research and we’re happy that you choose to spend some time with us. If you have other comments, concerns or suggestions for how we can improve any aspect of the magazine or Web site, please let us know. | Q

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Quirk’s Marketing Research Review is not responsible for claims made in advertisements.



Reader survey shows strong relationship

These are uneasy times in the print media business. Each day seems to bring more stories of newspapers and magazines paring staffs or shuttering titles. Even before the current economic woes caused ad budgets to freeze solid, marketers were questioning the value of print advertising while committing more and more of their dollars to online outlets.

Desperate for sales, some in the B2B realm have lost patience with any kind of advertising or promotion that doesn't lead directly to a big order from a new customer. Even as prospects are saying that they don't want to be subjected to intrusive, one-on-one sales pitches, marketers seem to feel that these direct-selling methods are the only worthwhile approach. Brand-building? Audience-educating? Positioning? What's that?

The overall impression one might get is that print is headed the way of the dinosaur. Naturally, as editor of a magazine, I hope that's not the case. I enjoy my job and am a firm believer in the value of marketing research. After being here for 20 years, I'd like to stay for 20 more!

Maybe we're old-fashioned,

but we have always assumed that if we put out a quality product that served our readers' needs, delivered friendly and helpful customer service and kept trying to improve every single day, we could establish a mutually beneficial, long-term relationship with our audiences.

Not that we are interested in going back to the days when print was king. We've taken advantage of all that the Web has to offer, creating our archive of past articles and adding a host of other free resources and functions at quirks.com to help researchers do their jobs. Print-magazine subscribers can always access an online version of current articles. And we offer a fast-reading monthly e-newsletter that allows us to present topical, timely stories that would be outdated in the print magazine.

Growing substantially

We know that things can certainly change in an instant but for now, it appears the love affair between *Quirk's* and its readers is still a strong one. Our print-subscription renewal rates and circulation numbers have grown substantially each year. Traffic at our Web site

increases every month.

Now, using the word love might seem like overkill but that's the very term that nearly a dozen people used to describe how they feel about the magazine during my informal chats with readers at the IIR Market Research Event last October.

The positive feelings were also plainly evident as we analyzed the results of a reader survey that we conducted last summer. Readers expressed high levels of overall satisfaction with the magazine, citing research case studies, technique articles and our monthly Research Industry News department as some of the most-read sections.

Readers also reported taking a number of actions based on their exposure to research companies through the magazine, whether from reading about a company in an article, seeing a company directory listing or noticing a display advertisement. Nearly 66 percent said they discussed or referred an article to a co-worker or client; 43.5 percent recommended *Quirk's* to a client or co-worker; and 66.7 percent visited an advertiser's Web

continued on p. 81



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