QUIRK'S

Marketing Research Review

MAY 2009

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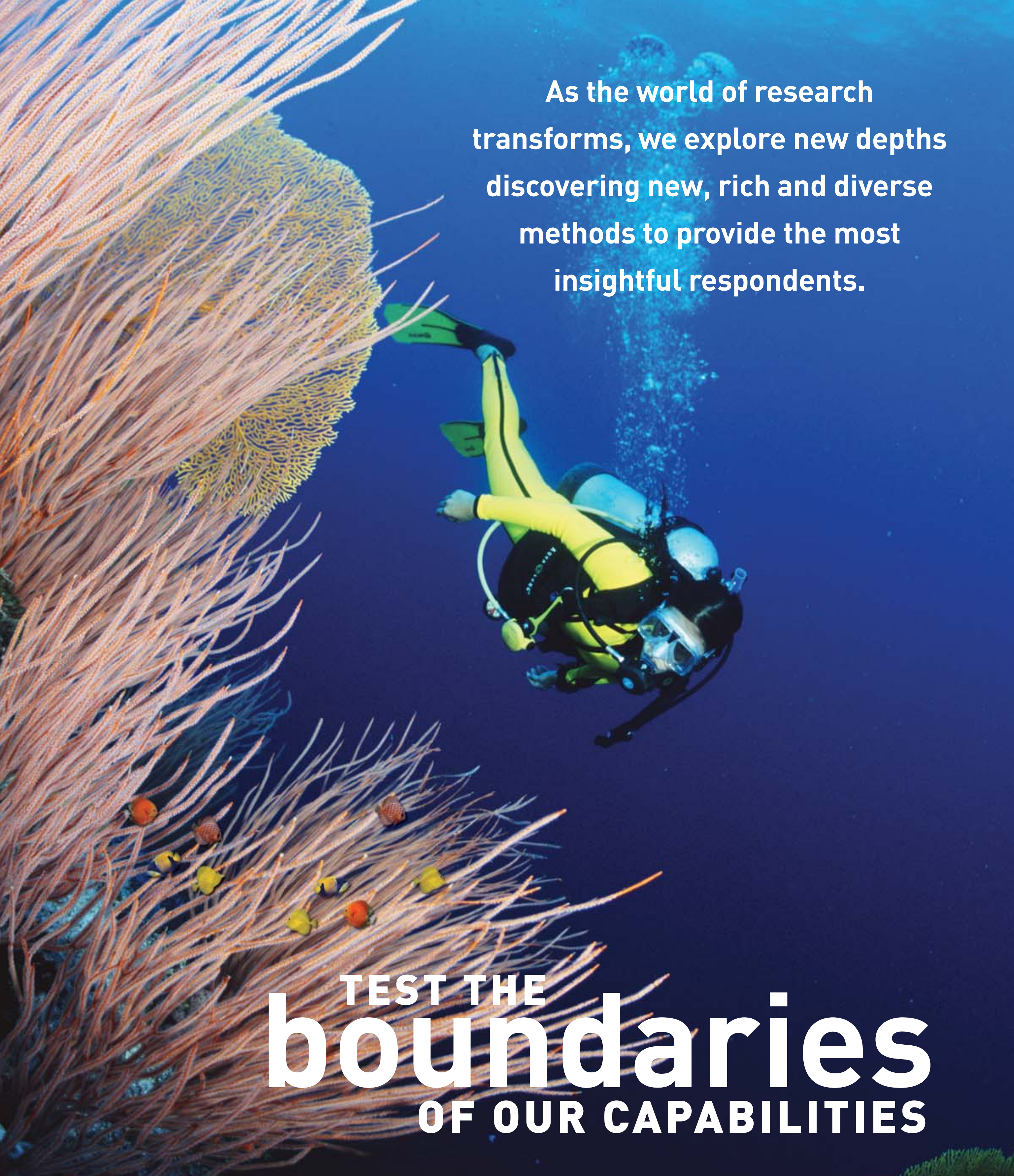
- > Translating 'researcher-speak' into 'executive-ese'
- > Do 'prosumers' have a place in your focus groups?
- > A report on the 2008 Confirmit Market Research Software Survey

2009 Focus Group Moderator Directory


As the world of research transforms, we explore new depths discovering new, rich and diverse methods to provide the most insightful respondents.
TEST THE
boundaries
OF OUR CAPABILITIES

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Volume XXIII Number 5

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in case you missed it...

news and notes on marketing and research

Online coupons boost overall coupon redemption

More shoppers are using coupons to stretch their grocery budgets, but they're not all clipping them out of the Sunday flyers. Instead, shoppers are increasingly skipping the scissors and getting coupons online or having discounts sent to their smartphones and rewards cards, according to Timothy W. Martin's February 25, 2009, article "Coupons Are Hot. Clipping Is Not," in *The Wall Street Journal*. Since October 2008, coupon usage has risen about 10 percent, according to Inmar Inc., a Winston-Salem, N.C., coupon-processing agent.

Online coupons account for 1 percent of all coupons offered nationwide, but their use is growing quickly. Manufacturers are attracted to digital-coupon delivery in part because of its 13 percent redemption rate - far above the 1 percent redemption rate for coupons found mostly in newspaper inserts, on the back of sales receipts and on product packaging.

Online coupons are being scoured for untapped discounts. Coupons.com, a Mountain View, Calif.-based site that offers coupons from food manufacturers and grocers, says its users printed out online coupons valued at $300 million last year, an increase of 140 percent from 2007. The company predicts the total will triple this year, partly because of the recession.

On the whole, however, coupon usage is on the decline. In 1992, 7.9 billion coupons were redeemed. In 2008, 2.6 billion coupons were used. Part of that decline can be attributed to a robust economy in the mid- to late-1990s. Coupons also lost some appeal after the emergence of supermarket loyalty programs, whereby shoppers sign up for a card to get discounts at the cash register.

Girl tweens not what they seem

The tween girl is famously pop-culture-conscious, well-connected to her peers and willing to grab on to the next hottest thing. Yet as a market segement, the tween girl proves enigmatic and elusive. So how are marketers to understand and reach this highly-sought-after and highly-lucrative group? According to Denise Restauri's March 17, 2009, article "Stop Thinking for Tween Girls" for MediaPost Publications, the answer is simple: listen. Give up preconceived ideas of what she wants and simply ask.

The following are a few common misperceptions and how research has helped debunk the myth of the tween girl.

Myth: If we declare it to be cool, she will buy.

Not so. The March 6, 2009, Forbes.com headline read, "The Next Jonas Brothers: Eight new tween stars are about to hit the big time." While the adults who chose the top eight new stars might want them to hit the big time, according to a recent survey of 400 tween girls on AllyKatzz.com, the stars are nowhere near mega-stardom. The girls were asked to comment on the list and rate the boys as "hot" or "not." A majority of the girls voted seven out of the eight boys not hot.

Myth: She is tech-savvy and online at all times.

Although she is computer literate and familiar with much of the latest technology, she is not tied to her computer. Tween girls have definite preferences regarding how they want to be reached. AK Tweens Pulse-Check Research conducted by AllyKatzz.com reports how girls want to get mail: 58 percent text, 27 percent e-mail and 13 percent snail mail. As for Twitter, forget it because they aren't tweeting. Eighty-four percent of girls don't know what Twitter is and, of the girls who know it, only 5 percent use it.

Myth: The only thing she cares about is her friends.

While friends do rank No. 1 for them, tween girls also care about education - mainly about testing and the pressures of school. They care about Iraq and Afghanistan. They care about driving, the legal drinking age, drugs and the peer pressure they face. They care about the economy and they care about being bullied - online and off.

So to understand the tween girl, don't assume - just ask.

Burger King upgrades its broiler - and its menu

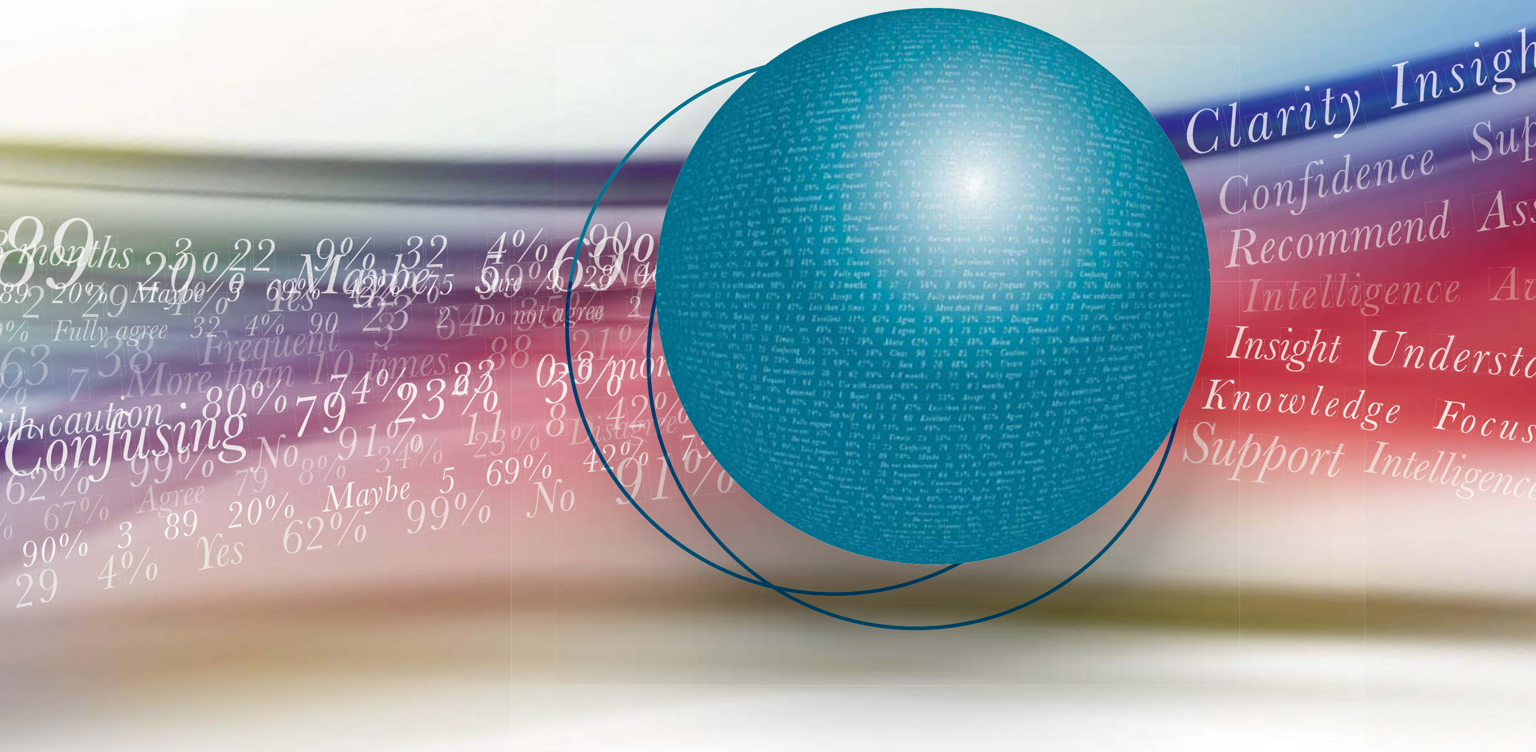
Quick-service restaurants have seen an influx of customers trading down from fine- and casual-dining establishments since the U.S. economy took a turn for the worse, and one fast-food chain is rising to the occasion. Consumers with discerning palates may be surprised by the offerings from Miami chain Burger King, according to Elaine Walker's March 10, 2009, article "Would You Like Ribs With That? New Broiler Means New Burger King Menu," in the *Miami Herald*.

Barbecued ribs, a grilled salmon sandwich and a steak kabob are just a few of the 45+ menu items the company has in testing and that are made possible by its new broiler. Burger King has upgraded its 50-year-old broiler to a newer, more-efficient version that allows for flexible cooking settings instead of just one setting - for a piping-hot Whopper with cheese. As a result, Burger King has been able to push its limits and include less-conventional items.

By January 2010, all U.S. Burger King restaurants should have the broiler, which has been installed in about 60 percent of the stores. The first new-broiler-inspired offering is the XTC Steakhouse Burger - a thicker, juicier burger made to appeal to Burger King's core customers. The most elaborate of three flavors will be a version topped with Swiss, cheddar and American cheese, bacon, Parmesan peppercorn sauce and more. The $4.69 price puts it at the high end of Burger King's menu.

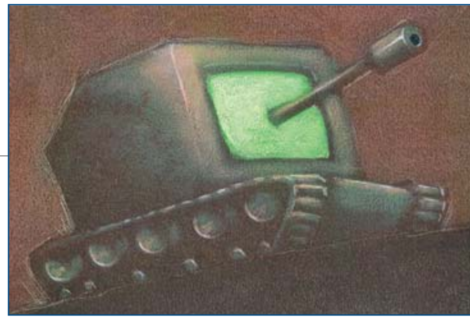
Analysts say the strategy makes sense for Burger King, as long as it remains true to its core customer. The items are not so much aimed at new customers as much as they are at luring existing customers to come in more often.

Burger King plans to test the fire-grilled pork ribs in Las Vegas and Indianapolis. "Will consumers be accepting of ribs at a fast-food joint? If they are, that has the possibility to be a game-changer," said Steve West, restaurant analyst at Stifel Nicolaus, a St. Louis brokerage firm.



war stories

true-life tales in marketing research



Editor's note: War Stories is an occasional column in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous anecdotes of life in the research trenches. Send your own (or a colleague's) tales of research-related wackiness to him at artshulman@aol.com. Contributors may remain anonymous.

Tony Blass of Field Dynamics reports that years ago he was working for a company that did a mail survey among Toyota owners. Of course, his company paid for the return postage via pre-paid envelopes. What Blass didn't know is that the return postage fee could be applied to anything returned as long as the return barcode was affixed. So one day he received a brick in the mail. Using clear tape, a respondent had chosen to express his or her feelings by mailing in the brick, which was actually fairly expensive to receive. Blass displayed it in his office to remind him of the importance of respondent outreach and education.

Diane Trotta of Trotta Associates tells of a focus group on frozen entrees she conducted in a suburb of Chicago. Her client was thinking of marketing a line of foods featuring regional Italian cooking, such as dishes from Tuscany, Umbria and Milano. But at the beginning of the group, when respondents were asked what comes to mind when they hear about regional Italian cooking, one woman responded, "Chicago-style pizza."

I didn't know there was a Chicago in Italy.

Trotta also tells about a survey she conducted after a product placement in which consumers were asked to take home an underarm deodorant to try. In the interview a few days later, when one woman was asked what she thought of the product she gushed over its aroma, said that it was easy to apply, that it protected her, and went on and on praising the wonderfulness of the deodorant.

But the woman did have sort of a minor complaint. When asked if there was anything negative about the product she reluctantly reported, "Well, after I put it on, my arm got stuck to my side and I couldn't pick my arm up for hours."

Apparently some respondents just want to be positive and avoid negativity about new products.

Liz Kovacs of Boulder Focus Center reports that one of their moderators was conducting several focus groups during a trade show, using a room rented in the convention hall. The moderator had left all the boards and materials in a locked room overnight and the next day, a short while before the focus groups were due to start, he discovered that everything was missing.

Thinking fast, he asked to review the security tapes from the previous evening, which showed that a custodian had thrown all the materials away. The janitor was tracked down and remembered which Dumpster the boards were in. Luckily the trash had not been emptied yet. With the help of several convention staff and a hair dryer, most everything was salvaged and the focus group went on as scheduled.

Joe Vorrasi of Harris Interactive tells of a verbatim comment from a national telephone survey they did of men diagnosed with an enlarged prostate. When asked, "To what mailing address would you like us to mail your $5 honorarium, sir?", the man replied, "I don't much care for the idea of staring at a tank of fish in my living room, but thank you anyway."

Corey Hammer of Career Education Corporation was conducting focus groups with college students on educational institutions, and one of his respondents was just like a character played by Sean Penn in the movie *Fast Times at Ridgemont High*, a slacker and dopehead named Jeff Spicoli. His head sloshed about from side to side. He looked ready for a Twinkie throughout the entire session.

Hammer was able to avoid reacting to the resemblance, but after he returned from conferring with his clients (who were laughing in the back room about "Spicoli") during a writing exercise, he had the hardest time not grinning like an idiot or laughing out loud to Spicoli's head bobs.

Toward the end of the session, Hammer had participants in a role-playing exercise about how they would market their school and make it different from schools that offer similar programs. Other students offered reasonable and useful comments relating to improving the advertising, what types of information the school should offer prospective students and so on.

Spicoli's response? "I would offer them a buffet."

The glass nearly shattered due to the laughter from the back room. | Q

What does a brand's wonderfulness say about its recession survival?

How "wonderful" a brand is may directly impact its ability to withstand economic downturn and garner customer loyalty. The 10 most wonderful (and perhaps recession-resistant) brands in the eyes of U.S. consumers are (in descending order): Hershey's, Google, Sony, Kraft, Crayola, Kellogg's, Scotch Tape, Wii, Rolls-Royce and Johnson & Johnson, according to a December

2008 study released by the Boston office of U.K.-based research agency Kadence. The company surveyed 5,500 educated, affluent consumers age 18-54 and asked them to rate their liking of brands using a seven-point scale, with 7 being a wonderful brand, 1 being a not-so-good brand and 4 representing a good brand. Perceptions of value, familiarity and usage of each brand were also solicited. The 10 least-wonderful brands are (from the bottom up): National Enquirer, AIG, Botox, Kia, alli, Hummer, O The Oprah Magazine, Dress Barn, ChemLawn and Direct Buy.

In terms of value, brands that were seen as offering the best ratio of wonderfulness-to-cost were Wal-Mart, Google, Amazon, Hershey's, Target, Cheerios, Campbell, PBS, Yahoo and eBay. Brands that were seen as offering the worst ratio of wonderfulness-to-cost were Hummer, Botox, Prada, Land Rover, Gucci, AIG, Saks Fifth Avenue, Louis Vuitton, Maserati and Ferrari.

The research suggests a link between positive brand perceptions and company stock performance, says Owen Jenkins, CEO of Kadence. "Detailed analysis of responses shows a strong correlation between the level of consumer affection and stock performance in 2008. For example, corporations owning brands with a mediocre affection score of 4.5 out of 7 lost nearly 50 percent more stock equity last year than corporations owning brands with an affection score of 5.5. In other words, a small difference in how much a brand is loved makes a big difference in how it performs on the stock market."

An examination of the data through the lens of respondents' level of concern about the financial status of their households suggests that brands especially liked by those with the biggest financial concerns - such as Prilosec, Sunkist, Orville Redenbacher, Maybelline, Johnson & Johnson and Kool-Aid - may be the ones that profit most from a prolonged or worsening crisis. For more information visit www.kadence.com.

Hispanic Internet usage surpasses U.S. trends

Hispanic Internet users are 21 percent more likely to download digital content than the average adult online. Forty-two percent of Hispanic Internet users have downloaded some form of digital content during the past 30 days, compared to 35 percent of the total Internet population, and music is the top download category for both Hispanics and the total Internet population. Almost one-third of Hispanic Internet users and almost one-quarter of all Internet users have downloaded music during the past month, according to a study from Scarborough Research, New York.

Hispanics have been taking advantage of the national expansion of broadband, and their rate of adoption has mirrored that of the total U.S. population. Currently, 68 percent of Hispanic Internet users have a broadband connection in their household, an increase from 13 percent in 2002. This is roughly the same pace of broadband adoption of adult Internet users overall. Seventy-one percent of U.S. Internet users currently have broadband at home, growing from just 15 percent in 2002.

"Increased high-speed Internet access among Hispanics is opening the door for online businesses to establish brand loyalty with this consumer group," says Gary Meo, senior vice president, digital media services, Scarborough Research. "Offering Hispanics new and creative ways to interact with a brand online - particularly via downloaded digital content - could go a long way in successfully marketing to the Hispanic adult."

The majority (54 percent) of Hispanics are now online. In fact, Internet access among Hispanic adults has increased 13 percent since 2004. By contrast, Internet access by all consumers nationally grew 8 percent during this time period.

Miami is the top Hispanic market for broadband penetration. Seventy-six percent of Hispanic Internet users in Miami have

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names of note

Core Insights Research and Marketing Strategy LLC, Boulder, Colo., has promoted **Emily Steider** to study coordinator.

BrainJuicer Group PLC, a London research company, has appointed **Alex Hunt** as vice president, U.S. client service. Hunt will be based in New York.

Polaris Marketing Research Inc., Atlanta, has hired **Ashley Popham** as a data analyst and **Helen Pham** as a research assistant.

Knowledge Networks, a Menlo Park, Calif., research company, has made several new hires: **Wendy Mansfield**, vice president, client service, government and academic research; **Stephan Benzekri**, associate vice president, client service, pharma/health care; **Sara Doran**, associate vice president, client service, pharma/health care; and **Joe Richardson** and **Eric Robertson**, research analyst, project management.

Ina Noble has been named vice president, strategic account management, of *TVG Marketing Research and Consulting*, Dresher, Pa.

Hypothesis, a Los Angeles research firm, has named **Larry Levin** COO.

Paris research company *Ipsos* has hired **Mary Kaye O'Brien** as vice president. O'Brien will be based in Seattle.

Rochester, N.Y., research company *Harris Interactive* has appointed **Stefan Schmelcher** as president, global loyalty solutions. Schmelcher will be based in Munich, Germany.

Denver research company *iModerate* has hired **Shannon Audino** as senior director, client development.

Lightspeed Research, Princeton, N.J., has added three new members to its Wimbledon, U.K., team: **Angela Bonora**, project manager; **Puja Myne**, sales coordinator; and **Matthew Seabrook**, client operations manager.

Innerscope Research, Boston, has hired **Andre Marquis** as senior vice president, sales and marketing.

Millward Brown, a Naperville, Ill., research company, has named **Bernd Büchner** managing director, Germany.

Roger Green and Associates Inc. (RG+A), a New Hope, Pa., research company, has hired **John S. Clark** as senior vice president, client strategist, and **Katie Ka** as associate director, research. RG+A has also promoted **Season Stuffle** to director, research operations.

Clark **Ka**

Stuffle

IMS Health, a Norwalk, Conn., research company, has elected **Bradley T. Sheares** to its board of directors.

Cal Martin has joined *Luth Research*, San Diego, as a consultant.

The Market Research Society, London, has named **Rita Clifton** to be its next president. Clifton is currently with New York research firm Interbrand.

InsightExpress, a Stamford, Conn., research company, has promoted three employees within its digital media measurement group: **Harmen Westra** to senior director, **Nancy Dillon** to Northwest regional manager and **Alicia Allijan** to senior account executive.

Synergy Research Group, Reno, Nev., has named **Sam Alunni** and **John Armstrong** vice president, research.

Jeff Berg has joined *MRops*, a Doylestown, Pa., research company, to lead its MR-Communities division.

Interpret, a Santa Monica, Calif., research company, has hired **Yuanzhe "Michael" Cai** as vice president, video games.

Verilogue Inc., a Horsham, Pa., research company, has promoted **David Franke** to director, insights and analytics.

John Kelly, chairman of Market Direction International, Surrey, U.K., has been elected an emeritus director of the *Marketing Research Institute International* (MRII), St. Louis. The MRII board of directors has also elected the following new directors: **David Haynes**, Western Wats, Orem, Utah; **Michael Lautenschlager**, The GfK Group, Nuremberg, Germany; and **Wayne McCullough**, Intelligent Data Mining and the University of Michigan, Ann Arbor.

Josh Mendelsohn has rejoined *Chadwick Martin Bailey*, a Boston research firm, as vice president, marketing.

Greenfield Online Inc., a Wilton, Conn., research company, has hired **Sam Rai** as director, client development.

New program offers publishers snapshot of research results

Dynamic Logic, a New York division of Naperville, Ill., research company Millward Brown, has launched a Publisher Normative Data Share Program in partnership with Safecount, a New York data collection company. Dynamic Logic will provide a Publisher Norms Snapshot to publishers who have adopted node technology and who have participated in over 10 Dynamic Logic research studies. The normative data, which is from Dynamic Logic's MarketNorms database, supplies publishers with an overview of the average branding impact of advertising running on their site judged on five metrics and based on data from campaigns measured by Dynamic Logic.

Publisher Norms Snapshots are available on a biannual basis and reflect all the data collected on the publisher's site in aggregate, including studies commissioned directly by the publishers and other eligible studies commissioned by third parties.

"Naturally, when a publisher cooperates in our ad effectiveness studies, they want the option to see the results, regardless of who has commissioned the research," says Michelle Eule, managing director of AdIndex Solutions, Dynamic Logic. "To respect the proprietary restrictions on individual campaign results, we are instead sharing aggregated study results, which offers publishers an expanded view of campaign effectiveness on their site." For more information visit www.dynamiclogic.com.

Global Web Index to measure social media impact

Trendstream, a London research company, has introduced the Global Web Index, a semiannual Web usage study designed to quantify global Web trends and the impact of social media, conducted with the assistance of Lightspeed Research, Princeton, N.J.
The research will launch with 16,000 consumers in the U.K., France, Germany, Italy, Spain, the Netherlands, Russia, the U.S., Canada, Mexico, Brazil, India, China, South Korea, Australia and Japan. The first wave of data will be delivered in June 2009.

The Global Web Index focuses on how social media is being adopted and the scale of usage. The data is designed to complement existing online planning tools and to allow custom analysis split by demographic, media usage and attitudinal profile data. For more information visit www.globalwebindex.net.

Skopos rolls out three online tools

Skopos, a London research company, has introduced a set of online qualitative and quantitative tools to evaluate media: Skopos Sketchpad, Skopos Heatseeker and Skopos Replikator.

Skopos Sketchpad is an online concept-testing tool designed to make the respondent's experience more lively and provide visual feedback to the client. Web pages, ads, direct mail, packaging concepts and logos can be marked by respondents using visual images and text. An example of this is a respondent dragging and dropping emoticons (or check-marks and crosses) onto the image and then explaining in the accompanying text box why they like or dislike this area.

Once respondents have completed the Skopos Sketchpad exercise, the resulting map showing "hot" and "cold" areas where respondents have made comments is known as the Skopos Heatseeker tool. It is intended to allow clients to see which areas of the ad or Web page are the most eye-catching or the most liked or disliked. The emoticons (or check-marks and crosses) and individual respondents' comments can then be overlaid. These are also available in Excel or PDF format.

Skopos Replikator is an online page-turning technology that aims to replicate the actual experience of flicking through and browsing the hard copy of a magazine, brochure or other print publication. Respondents can "turn" the pages of the publication just as they would do with a physical copy. The Skopos Replikator tool can be used to determine recall of various sections or articles within a publication. For more information visit www.skopos.info.

Clarabridge debuts response management solution

Clarabridge, a Reston, Va., research software company, has released Clarabridge Smart Response, a customer-issue analysis, response and routing solution. Clarabridge Smart Response was created with the goal of generating automatic customer-specific response letters that acknowledge customers' negative sentiments or frustrations, specific problems and suggestions, and if appropriate, attaching vouchers, coupons or other forms of compensation. The program, which uses text mining, is based on the Clarabridge Content Mining Platform's existing natural language processing, categorization, sentiment, analysis and reporting engines.

In addition, Clarabridge Smart Response will be integrated with Oracle's Siebel CRM by fall 2009 and is intended to allow Siebel users to feed incoming customer issues to Clarabridge Smart

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News notes

Rochester, N.Y., research company **Harris Interactive** has reduced its U.S. employee headcount by about 90 people (or about 16 percent of its full-time workforce) to align its cost structure with revenues and to yield approximately $10 million in annualized cost savings and other non-labor savings.

London marketing communications company **Aegis Group**, which owns research firm **Synovate**, has cut 5 percent of its global workforce (or around 780 employees) as part of a £40 million cost-saving plan. According to Aegis, the cutbacks will save the company £20 million in 2009. Seventy of the cuts will come from its U.K. operation.

Arbitron Inc., a Columbia, Md., research company, has extended a number of enhancements to all Portable People Meter (PPM) markets that the company committed to in its agreements with the Attorneys General of New Jersey, New York and Maryland. PPM customers are in the process of receiving enhancements to the PPM methodology in cell-phone-only sampling, address-based sampling, in-tab compliance rates and response metrics. In addition, customers in all PPM markets will see an increase in transparency for more of the sample metrics, including the distribution of sample by zip code and cell-phone status.

Separately, Arbitron has realigned its executive staff, including the creation of three new positions: executive vice president, customer solutions; executive vice president, strategy and business development, and executive vice president, CMO.

Finally, Arbitron has taken further action in its strategic realignment and will reduce its workforce by approximately 10 percent of full-time employees. Arbitron is also implementing a reduction in non-employee-related expenses on a company-wide basis. As a result of these initiatives, the company expects to realize savings in the remainder of 2009 that would offset the first quarter 2009 charge. The workforce and expense reductions are expected to result in a reduction in 2010 expenses of more than $10 million.

Evo Research, London, has closed its U.K. office. Its German locations are still operational.

Western Wats, an Orem, Utah, research company, has closed its Chadron, Neb., call center, terminating approximately 100 full- and part-time positions. Western Wats has also closed call centers in Utah and Arizona.

Ipsos Reid, an Ottawa, Canada, division of Paris research company Ipsos, intends to close its Ottawa call center in June 2009, citing client demands for cheaper research. Around 40 full- and part-time jobs will be lost.

Kantar Operations, a Naperville, Ill., research company intends to close its Warwick, U.K., call center in June in response to a decline in telephone volumes by 50 percent since 2005. Also in June,

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Calendar of Events June-October

Parks Associates will hold its Connections 2009 conference, focused on advanced digital lifestyle solutions for residential and mobile environments, on June 2-4 at the Santa Clara Convention Center in Santa Clara, Calif. For more information visit www.connectionsconference.com.

The MRA will hold its annual conference on June 3-5 in Chicago. For more information visit www.mra-net.org.

CASRO will hold its international research conference on June 18-19 at the Fairmont Hotel in Washington, D.C. For more information visit www.casro.org.

The Travel and Tourism Research Association will hold its annual conference, themed "Catch the Wave: Tourism Research!," on June 21-24 at the Hilton Hawaiian Village in Honolulu. For more information visit www.ttra.com/hawaii2009.html.

IIR will hold a conference, themed "Voice of the Customer," on June 22-24 at the Chicago Marriott in Chicago. For more information visit www.iirusa.com/voc.

ESOMAR will hold its annual congress on September 15-18 in Montreux, Switzerland. For more information visit www.esomar.org.

The Australian Market and Social Research Society will hold its annual national conference, themed "100 Stories," on September 30-October 1 at the Hilton Hotel in Sydney, Australia. Workshops will be held on October 2. For more information visit www.mrsa.com.au.

The AMA will hold its annual marketing research conference on October 4-7 at Desert Springs JW Marriott Resort & Spa in Palm Desert, Calif. For more information visit www.marketingpower.com.

The QRCA will hold its annual conference, themed "Communicate, Rejuvenate, Celebrate," on October 7-9 at Desert Resorts in Palm Springs, Calif. For more information visit www.qrca.org.

CASRO will hold its annual conference on October 14-16 at The Broadmoor in Colorado Springs, Colo. For more information visit www.casro.org.

IIR will hold its annual conference, "The Market Research Event 2009," on October 18-21 at the Red Rock Casino Resort & Spa in Las Vegas. For more information visit www.iirusa.com.

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

By Rhoda Schild

Communication keeps focus groups divine not dreadful

There are five types of focus groups: divine, good, average, hit-or-miss and dreadful.

Divine is when everyone within the group has met the client's exact specifications, each respondent is articulate and just the right amount of talkative, the moderator is cooking on all burners and the chemistry has seemingly been laid down by the gods. To top this off, everyone within the group has dressed appropriately, video and sound are in sync, and the never-smiling camera guy is technically-adroit and grinning from ear to ear. When the groups are done, they are correctly labeled, picked up by FedEx and will arrive before 10 a.m. the next day for the client to view.

Good is when respondents have met the client's specs but some are talkative, some reticent; the moderator just cannot get his or her arms around this particular collection of people and while the group is composed of the correct respondents, there's not much electricity in the air. With a very good moderator this well-recruited group can be excellent; it may not hit the heights of magic but it can still be fruitful, yield a bounty of ideas and unto itself possess a small bit of enchantment.

Average is ordinary. Ordinary is what most people do not like to be labeled. Ordinary is when the respondents have met the specs but alas they are exactly what the client specified: ordinary. It is then within the moderator's realm to make the interview sexy, to elicit from a correct-but-ordinary respondent just why they are not buying said product; why they are not compelled to get the newest vaccine on the block; whether it's a monetary, safety or plain practical issue that keeps them from buying the car they covet; whether it's a packaging thing; or perhaps as simple as the fact that the ordinary respondent's medical insurance no longer pays for the brand medication and hence they are reduced to generics.

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snapshot

Disasters of all kinds can befall a focus group but many mishaps can be avoided, the author argues, when everyone involved functions like a team, with the same goal in mind, and engages in honest, effective communication.

An anecdote: Once upon a time, years ago, an ordinary group about an ordinary topic in an ordinary facility was yielding a sub-ordinary response. The group, comprised of 10 ordinary women, would only echo yes/no, yes/no with their replies. The extraordinary moderator, possessing a theatrical sense of drama, suddenly fell flat on the table. The loud thud and the inappropriateness of the action shocked the women into a high state of attentiveness. Lying prostrate on the table in front of them he bellowed, "If you are going to act dead, I am going to nap." Because of his theatrics this

group did a 180-degree turn and became a very successful, spirited event. Only a unique moderator could duplicate this performance, but a good moderator knows, when challenged, what resources they can pull from their bag of tricks.

Hit-or-miss can be standard or it can be bad. Here are just a few of the myriad reasons hit-or-miss can strike the bull's-eye or fall very short: if the client is a novice; is vague, obtuse, confused or unknowing; if the moderator is relying totally on the facility or recruiting service to pick up all the loose ends; if the recruiters are trainees; if the project coordinator is rushed or having a bad day; if all parties are not paying accurate attention but expecting all the other parties involved to pick up the unraveled threads.

Dreadful is a litany of the above plus even more bad traits. It starts with an unknowing, uncertain client drizzling errant information, misinformed instructions and issuing a badly-composed screener. It continues with a frustrated moderator who is sometimes aware they are impotent and sometimes unaware. It continues to recruiting, where the specs are not met, the respondents lie and the final recruitment a fiasco. A competent moderator can sometimes sense the impending trouble and, with a bit of tweaking, salvage a doomed project. But if the client is fearful, pompous or not trustful; if the moderator cannot find their way out of their maze-like discussion guide; and the recruiting is a big zero, the groups will be a working hell.

Clear communication

If conducting great groups is the ultimate aim, clear communication is the key. This means each and every member of what will morph into a small team will be allowed to ask for clarification on each, every and any issue they think necessary. Sometimes a lowly hostess at a facility has a brilliant observation. It is a wise team that will listen and incorporate her ideas into their next process.

But sometimes a smart-but-fearful moderator is not up to challenging a young, insecure client. Sometimes a newly-hired project manager, wanting so desperately to perform well, will assume knowledge they have not garnered instead of asking all those important questions to verify they have understood the project thoroughly. No good can come of this. Sometimes a bottom-of-the-rung-recruiter, wanting to be done with a job, will slide in an inappropriate respondent. When things go awry it is almost always because a miscommunication - major, minor or somewhere in between - occurred among one or more of the disciples working to put together groups or individual interviews.

In most cases, instead of relying only on e-mail, texting and other highfalutin technology, when reiterating and confirming last-minute changes, additions or subtractions, an old-fashioned telephone call works best. This personal communication has been known to avert the deadliest problems.

A few other observations in the name of better groups:

- When moderating highly technical respondents or erudite medical specialties, the facilitator must be gifted in dealing with these types. Whether the respondents be articulate, arrogant or just uncommunicative, it is the moderator's talent that will elicit a dialogue that makes clients glow.

- It makes sense when doing a fashion-related group of overweight, 18-28-year-old women that the moderator be female, that the moderator not be size two and that the moderator be able to empathize with this segment.
- When doing a small-group of successful men who own high-end luxury cars it is paramount to elicit their correct occupations. You do not want, as once happened to a moderator we know, to have a COO of a major corporation and a drug dealer swapping tales about their car-buying ventures. (Though the moderator who reported this event was not bored.)
- Upon confirmation, an A1 recruiter is compulsive about repeating, over and over, the final instructions and the day, date, time and address of the gathering.

Horror stories

The divine focus group is labeled thus only in hindsight. Dreadful can be anticipated almost from the very beginning. Good is the barometer. Average is less-than-spectacular but workable. The glitches, mistakes, blunders, oversights, muddles and pure unadulterated horror stories that can characterize hit-or-miss and dreadful are primarily due to poor communication, lack of follow-through and human error.

But when communication is clear, details compulsively attended to and everyone aboard feels empowered and validated, there is a greater chance that focus groups and individual interviews can truly be divine. | Q

How not to recruit a focus group

Enter article ID 19920403 at www.quirks.com/articles to read author Jim Schwartz's reconstruction of a disastrous focus group recruitment episode.

By Rod Antilla and Brian F. Blake

Translating 'researcher-speak' into 'executive-ese'

Dawn doesn't like what she is hearing. Recently hired as an analyst in the market research department at a large advertising agency, she listens as her new colleagues complain about the agency's account managers and other executives with client-liaison responsibilities.

One of them recounts a tale of woe in which the executives belittled the researcher's studies for being "off base." Research, the execs have said, is too descriptive and not enough prescriptive. That is, the studies describe the market and its buyers but do not tell the company how to take action.

Increasingly, Dawn learns, the agency's execs have come to view the research department as irrelevant. For their part, the researchers now feel that the execs collectively have the IQ of a turnip, for they seem to lack the ability to understand what is right in front of their eyes. This is not good!

Different worlds

Dawn is fictional, but the situation she faces is only too real for many, many market research analysts. This chasm between the two camps exists because execs and researchers often live in different worlds, with different roles and priorities, at least according to their formal job descriptions and according to the organizational chart on the office wall. To do their job effectively, researchers must come to understand why this chasm exists and must take steps to bridge the gap.

The execs' role in the agency is to make decisions. Ideally, to oversimplify somewhat, the exec looks to a research study; to reveal which alternative decisions exist ("I can make decision X, Y or Z"); to evaluate the likely success of each decision option ("Decision X has a high probability of having a big

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snapshot

To best communicate survey findings to the executives who must act on them, researchers must use the language of decisions. By presenting information that is integrated, simplified and focused upon the issue at hand, they will help their internal clients act decisively and also improve the standing of the research function within their organization.

payoff for us while Decision Y has a low chance of success; Decision Z has a high chance of being successful but a modest payoff even if it is successful"); and to compare decision options X, Y and Z in order to find the most workable one ("Compared to Y and Z, Decision X has the best chance of success and the highest payoff if successful").

In contrast, typically researchers see their mission as describing the market, reflecting their training and the qualitative and quantitative tools available to them (e.g., in survey design, statistical analyses). Researchers usually set out to document current purchase behaviors, explore positioning themes or uncover distinctive demographic and attitudinal characteristics of target segments, etc. From this essentially descriptive information, researchers may suggest implications for action ("The target audience finds this theme most appealing, and so possibly it is a good positioning theme to use") or they may content themselves with simply describing the current market situation ("Your customer base draws heavily upon middle-class, educated females") or reactions of consumers ("They like product concept A more than B").

While researchers can adopt a decision-making perspective, and sometimes do so, usually their focus is on providing descriptive information in a timely and cost-effective manner. Researchers may focus on description for good reasons. For example, they realize that when the managers make a particular decision they may need to take into account factors unknown to the researchers, such as an upcoming change in the company's product manufacturing process or new contractual obligations to distributors. Or perhaps the researchers' descriptive approach springs from past negative reactions of execs ("Don't try to make a decision for me! Just give me the info and I will make the decision!").

Bridge the gap

Still, our point is that researchers will often be seen as more valuable to an organization when they bridge the gap and translate their findings from researchers' descriptions into the executive's framework of decision selection. Going the extra mile in data analysis and report presentation by adding prescriptive elements to the descriptive components can pay off.

Let's go back to Dawn. One of the clients of her agency is a restaurant chain. Previously, the agency employed a positioning strategy focused upon the chain's good prices. Now, agency discussions with the client and several industry-wide studies have suggested that current patrons of this type of restaurant are more responsive to themes of convenience, quality and uniqueness. The client turns to the agency for guidance and asks whether the chain should stick with its price focus or should shift to one of the three alternative themes. Accordingly, the client has approved an agency-directed positioning study to help answer the question. It is now the job of the exec heading the agency's account team to use this research to make a decision: choose a strategy based on pricing, convenience, quality or uniqueness.

The agency's researchers realize that generating a mass of numbers about the market can bring this fact-finding research effort to a grinding halt. The information must be integrated, simplified and focused upon the decision at hand. As much as possible, the various measures of a company's success should be boiled down and combined into a few yardsticks or criteria, and the decision options compared on these yardsticks. (This topic was covered in the article "Four indicators, one goal" in the October 2007 issue of *Quirk's*. See Web link at the end of this story.)

Accordingly, the researchers sit down with the client and the agency account team and come up with the principal yardstick that would be used to compare the four decision options. In our story the key criterion is: Which positioning theme presents the most appealing picture in the eyes of those ready to dine at a restaurant in the geographical region served by the client's chain?

(A) Decision Choice	(B) Percent of Market Attracted By a Theme	(C) Percent of Those Attracted By a Theme Who are Ready to Eat Out	(D) Probability of Success	(E) Change Ratio	(F) Change in Odds of Success
Cost	30%	67%	20%	-	-
Convenience	20%	100%	20%	1.00	no change
Quality	20%	50%	10%	.33	67% decrease in odds
Uniqueness	30%	84%	25%	1.32	32% increase in odds

The research team then sets out on the study. Here, Dawn makes a proposal to her fellow researchers that potentially can change the value of the upcoming study in the eyes of the execs and can, hopefully, over time improve the sour relationship between execs and researchers at the agency. Based on her prior experience, she suggests that they take four steps. She illustrates the approach with a few simple statistics.

Step one: *Use measures of decision factors that are valid, cost-effective and able to be communicated to execs.*

A key decision factor is the relative appeal of the four themes. The responsiveness of consumers to the four themes can be gauged by more in-depth but fairly complex and expensive measures, such as conjoint or discrete choice modeling. Or it can be done using rating scales and direct questions ("Relatively how important to you are…") that are quicker and easier, though their validity can be compromised by a variety of distortions. What is needed, Dawn notes, is an index they can confidently assume identifies which of the four themes can most effectively attract a given consumer to that restaurant. For reasons of cost and ease of communication, she would prefer an analysis that involves simple statistics rather than a fairly complex mathematical model drawn from the decision sciences.

She shows her colleagues the table above. Column B is the percent of consumers who are drawn most strongly to restaurants with that feature (theme). For example, the first row shows that 30 percent of restaurant visitors in the target market are drawn by cost considerations (column B) more than by convenience, quality or uniqueness. Another 20 percent (see the second row in column B) are attracted more by convenience than by the other three items. Column C is the percent of each group in A that is ready to actually patronize a restaurant they find attractive. Of those 30 percent (attracted most by cost), two-thirds (67 percent, column C) are ready to go to a restaurant they find appealing rather than eating at home or making other plans.

Step two: *Cast the analysis from the perspective of a decision's success or failure.*

The theme in column A can be presented as a description of the theme in question, but it can just as rightly be phrased as a decision alternative for an exec. Column D can be understood as the proportion of the total market that has both characteristics (attracted and ready). It is calculated simply by multiplying column A by column B. But more appropriately, it is also the probability of a particular theme meeting the client's yardstick of success. In this example, an exec has the highest chance of success by using the uniqueness theme; its probability of success, 25 percent, is somewhat higher than the 20 percent probability provided by the current cost-focused campaign theme.

Step three: *Present a numerical index of how a decision choice will increase or decrease the exec's odds of being successful.*

Column E, Dawn confesses, is really for the eyes of her fellow researchers only and shows the ratios used to compute column F, the column to be shown to the exec. Column E is the odds ratio readily found in basic statistics books and is the odds of one decision alternative divided by the odds of another decision alternative. It can be calculated by dividing the odds of success with one decision (choosing uniqueness) by the odds of success with a second, baseline alternative (following the present approach, cost).

First, we get the odds of success with the uniqueness decision by dividing the probability of success (.25) by the chance of non-success (.75), giving us .33. Then we get the odds of success with the cost option by dividing the probability of its success (.20) by the probability of its non-success (.80), giving us .25. Next, we divide the odds of success with the uniqueness option (.33) by the odds of the cost option (.25), revealing an odds ratio of 1.32. In other words, the odds of being successful with the uniqueness approach are 32 percent better than are the odds of success with the cost option. This is a measure of change in the odds of success going from the denominator of the ratio (the baseline cost theme currently used) to the numerator of the ratio (the decision being considered, uniqueness). Thus, if the manager were to shift from a campaign emphasizing cost to one stressing uniqueness, the manager increases the odds of being successful by 32 percent. This is a big jump in most situations!

Step four: *Put it into English.*

Column F, presented to the execs, is the expression "in English" of how much a given decision increases or decreases one's odds of being successful against the criterion in question. A number above 1.00 is an increase and a number below 1.00 is a decrease in the odds of success compared to the baseline condition. Here, deciding to choose the uniqueness theme yields a 32 percent increase in the odds of being successful over the current situation's odds of success.

Doing the same calculations for the quality option yields a change ratio of .33. This is a drop from 1.00. So the quality option gives an odds of success 67 percent less than the odds with cost. Again, this is a major drop in the odds of success!

Dawn's proposed four-step approach has merit. It speaks the language of the execs - which decision most likely will be successful - and does so without the researchers' encroaching on their territory. It is quick to calculate and easy to communicate. It focuses the execs' attention on the decision criteria and thus can reduce the chance of the execs being distracted or overwhelmed by masses of descriptive statistics.

Translate their facts

The numerical example here is simple, but this basic approach can accommodate complex decision factors as well. The key point, as our story of Dawn indicates, is that researchers can translate their facts and figures into the language of decisions. The study can be presented in terms of the likely success or failure of specific options. This is what execs want to hear about. This is what they will appreciate. | Q

More from Blake

Enter article ID 20071006 at www.quirks.com/articles to read Brian Blake's "Four indicators, one goal" article from our October 2007 issue.

advertising/qualitative research

By Kristin Schwitzer and Dana Slaughter

Change your behavior

Ad agency uses Web-based qualitative with teens to help develop public-service campaign

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snapshot

The authors used online qualitative research to test several facets of a proposed public-service campaign aimed at getting teens to stop using the phrase "That's so gay." Respondents created and posted photo-journals, evaluated potential celebrity spokespeople, reacted to ad concepts and offered insights on how to motivate teens without coming across as preachy.

We can all remember what it was like to be a teenager. Each of us likely got more than enough advice and directions from parents, teachers and other role models about what to do and, sometimes more importantly, what not to do, as they tried to guide us on the path to being mature, thoughtful adults. Half the battle was just getting our attention; the other half was delivering the message in a way that got through to us.

So, imagine being given the challenge of persuading not just one teen but an entire generation of teenagers to stop being hurtful to others. This was the challenge presented last year to ad agency ArnoldNYC from The Ad Council and GLSEN (The Gay, Lesbian and Straight Education Network). Specifically, ArnoldNYC was tasked with raising awareness among straight U.S. teens around the hurtfulness to their gay, lesbian, bisexual or transgender (GLBT) counterparts of using slurs like "That's so gay."

As it turned out, step one was to grab teens' attention. Step two was to get through to them on their terms.

Increasing frequency

Phrases and words like "That's so gay," "fag," "faggot" and "dyke" are being used as insults with increasing frequency, creating an atmosphere, especially in schools, where GLBT teens feel disrespected, unwanted and unsafe.

In the spring of 2008, among the critical facts known about this situation were:

- 79 percent of high school students hear the words fag, faggot or dyke every day;
- 90 percent of GLBT teenage students are harassed and physically assaulted because of who they are or are perceived to be;
- GLBT students feel unsafe and are five times more likely to miss school, contributing to lower GPAs and college enrollment rates;
- every five hours, a gay teenager ends his or her own life; they are two to three times more likely than their straight counterparts to commit suicide.

While most teens don't see themselves as bullies or bigots, they are rather apathetic about GLBT issues. For them, phrases like "That's so gay" are part of their everyday vernacular and simply a habit.

To shift this mindset, the client team knew teens would not pay attention to another After School Special-type message that asked them to change their "ways," so they aimed to find a compelling approach. "We wanted to be appealing but we didn't want to be preachy," says Joe Kosciw, research director at GLSEN. "If the advertising could help dial down the frequency of these behaviors, the school environment for GLBT kids should markedly improve."

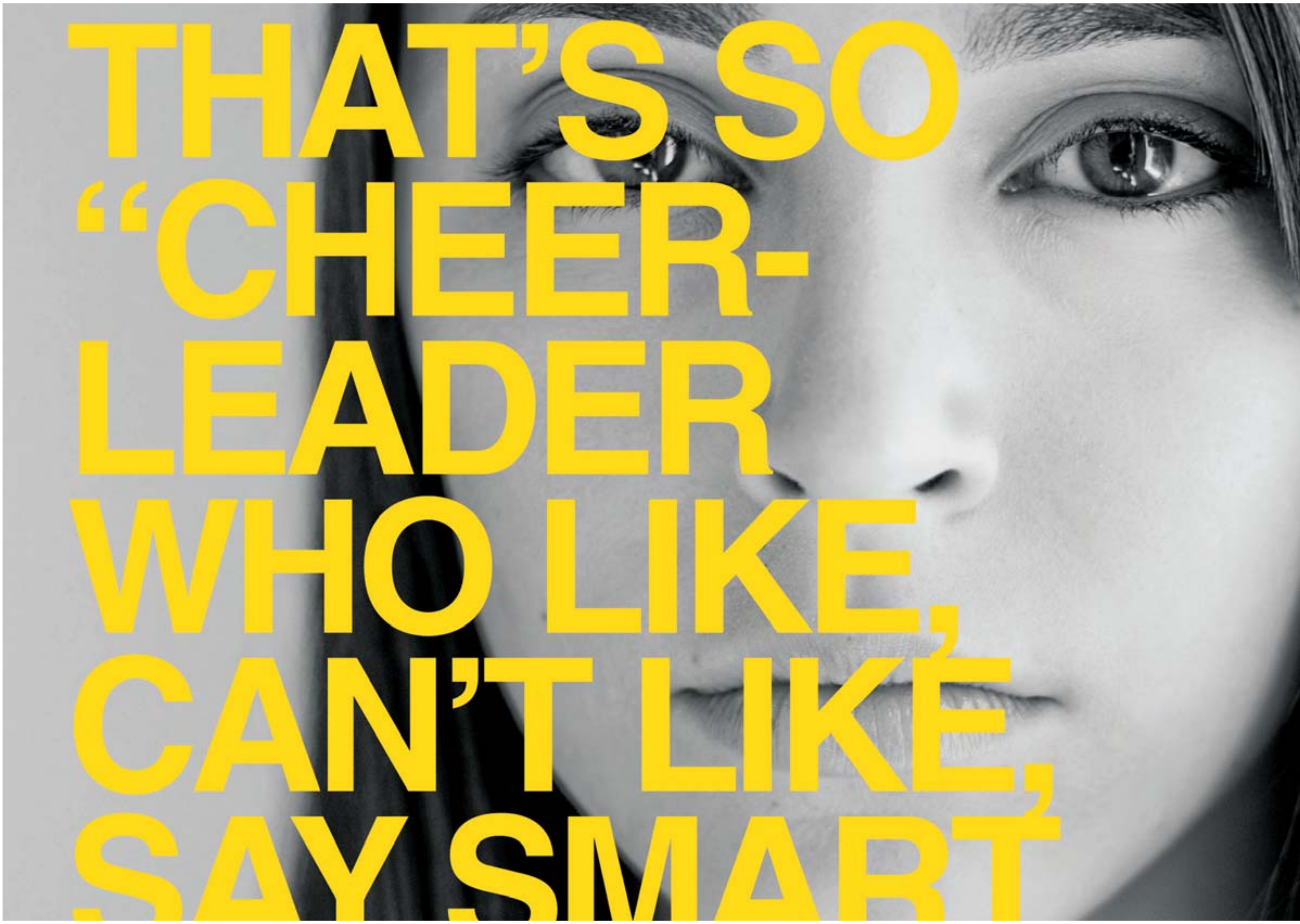
Open and thoughtful

GLSEN, ArnoldNYC and The Ad Council were looking for a quick way to test a wide array of potential creative with the teen target audience. Given that the ads were to be public-service announcements, the research budget was low and involved significant donations of professional time and services by various parties: ArnoldNYC, The Ad Council, Beacon Research, Slaughter Branding, 20/20 Research (recruiting) and Revelation Inc. (technology).

In addition, substantial money was saved by testing rough versions of the TV and radio ads, all created in-house by ArnoldNYC volunteers.

To be successful with the new campaign, the clients wanted a research solution that allowed teens to be honest, open and thoughtful about their reactions. They turned to online qualitative research, led by the authors.

The research objective was to get reactions from straight teens across the



U.S. to a variety of potential ads so that the most relevant creative could be identified and strengthened prior to the October 2008 campaign launch. The study included exposing teens to: two TV ads; six print ads; one radio ad; two outdoor executions; one banner ad; six potential URLs; two Web site home pages; and 39 potential celebrity spokespersons.

Given the need to reach teens across America quickly on a rather sensitive topic, and to get their candid reactions (not those influenced by their peer group) to a lot of creative, the authors ruled out in-person focus groups and even online group methodologies. Instead, we chose a series of online one-on-ones using a research platform from Revelation. Both consultants had experience with this tool, and felt it could offer an efficient and effective way to conduct advertising research with teens.

The research design involved "talking" one-on-one with these teens across America for five consecutive days, right where they live - on the Internet. Each of the 50 respondents were required to log in to a secure research site for about 30 minutes per day. Moderating was conducted in an asynchronous format and participants were able to log in each day whenever it was convenient. The teens largely participated online right after school and then again late at night after dinner and once homework was done (sometimes they responded at midnight, surprisingly).

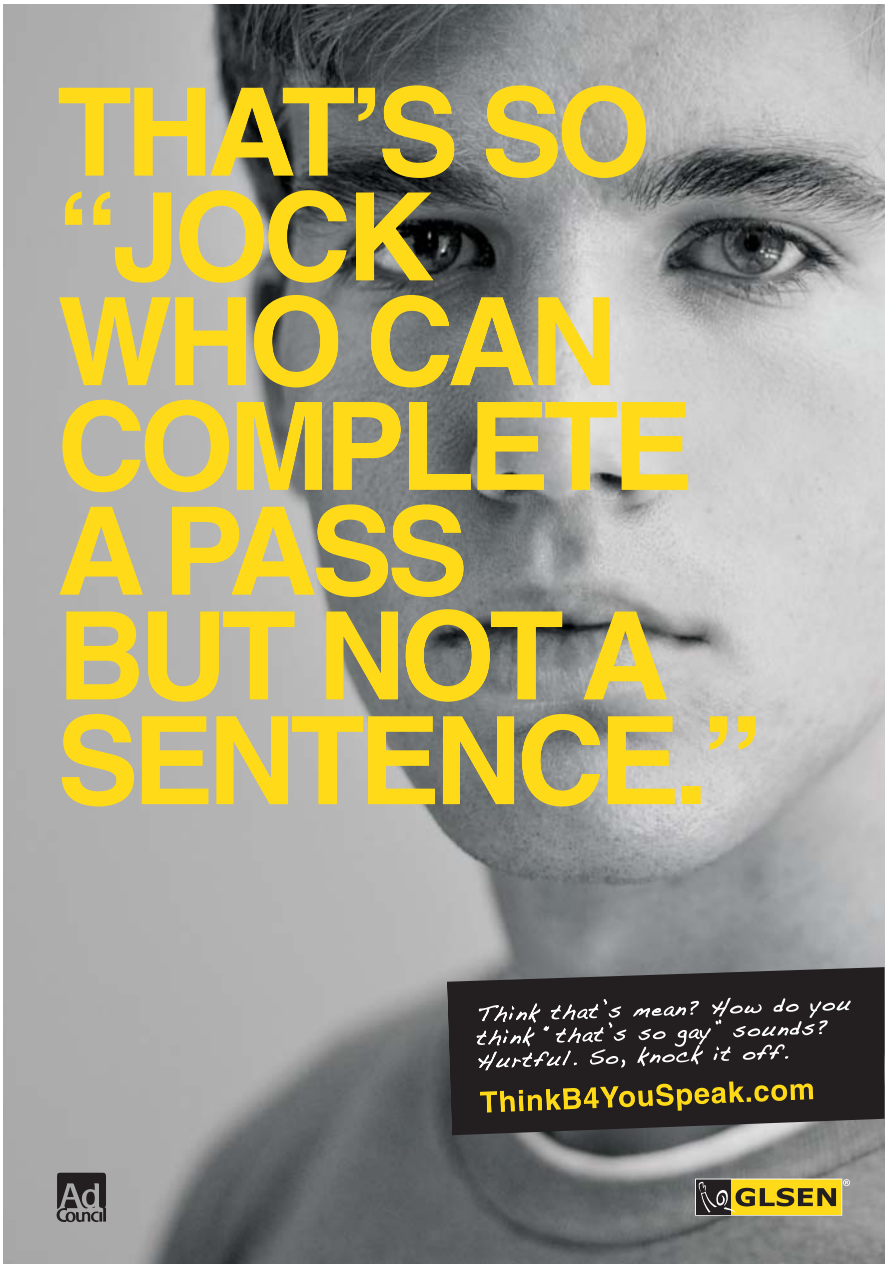
A total of 50 straight teens (ages 13 to 16) were recruited from across the U.S. using a hybrid online/phone approach. Cash honorariums were used, however the more-motivating incentive was a drawing for an iPod Touch among the 49 teens who finished all five days of the study. Respondents were self-described as neutral toward gays and lesbians. Half were in seventh or eighth grade and half in ninth or tenth grade; half were boys, half were girls. The participants were split into two groups (boys and girls), with each owned by one moderator.

Getting to know them

One of the keys used to get the teens to open up was to kick off the study by getting to know them first before jumping right into the advertising review. Day one was titled "All About Me" and used a photo-journal exercise to understand more about who they are as a person. In days two to four, reactions to the creative were gathered monadically, with stimuli rotated across interviews to prevent order bias.

A mid-study debriefing with the client team revealed the desire to modify the plan for the final day of data collection in order to explore some emerging themes in more detail. Thus, day five involved quickly gathering reactions to the 39 potential celebrity spokespeople, followed by an exploration of the overarching purpose of the campaign in more depth and an attempt to better understand how to take the message to the Internet and to teens in general. The study concluded by gathering feedback from the teens on what it was like to participate in this five-day online advertising research study.

Rich data resulted from the research, indicating that the campaign overall had succeeded in getting through to this cynical audience. The message had raised awareness of the issue (i.e., hurtful-



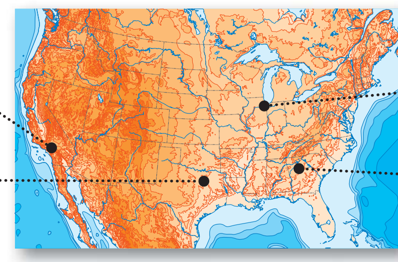
In the research, familiar stereotypes such as the cheerleader and football player were seen as more attention-grabbing for the print ads than the originally-proposed "Quirky Girl" and "Hipster Guy" concepts.

You want to show him the tiny kitchen you booked for the big taste test?

When you have a food study that's large in scope, you need a facility and staff that's long on capability. Not just any kitchen will do. You need extra helpings of space, serious power handling capacity, industrial strength hood length and more ways to arrange equipment than you can shake a spatula at.

We are the Big Three among kitchens used for taste tests and focus groups. Our four facilities regularly help big name players in the QSR and Foodservice Manufacturing industries sleep a little easier. We know how inadequate kitchens can become a real nightmare during multi-day tests. Our four locations offer a full range of research services and capabilities for clients that live large when it comes to quantitative and qualitative food studies. Comfortably-sized focus group and taste test rooms are standard with all four locations offering 25 laptops for your online studies.

Whether you're testing in Los Angeles, Chicago, Dallas or Atlanta, you can count on five-star service and capacity that provides a superior test environment. And if you're running a national study, we give you the ability to cover the country with a multi-city test and have it coordinated by four facilities that can work together seamlessly.



Visit us on the web at www.ThinkBigKitchens.com to see photos of our spacious kitchens, focus group rooms and taste test rooms. Or better yet, drop by one of our state-of-the-art locations and get an in-depth tour.

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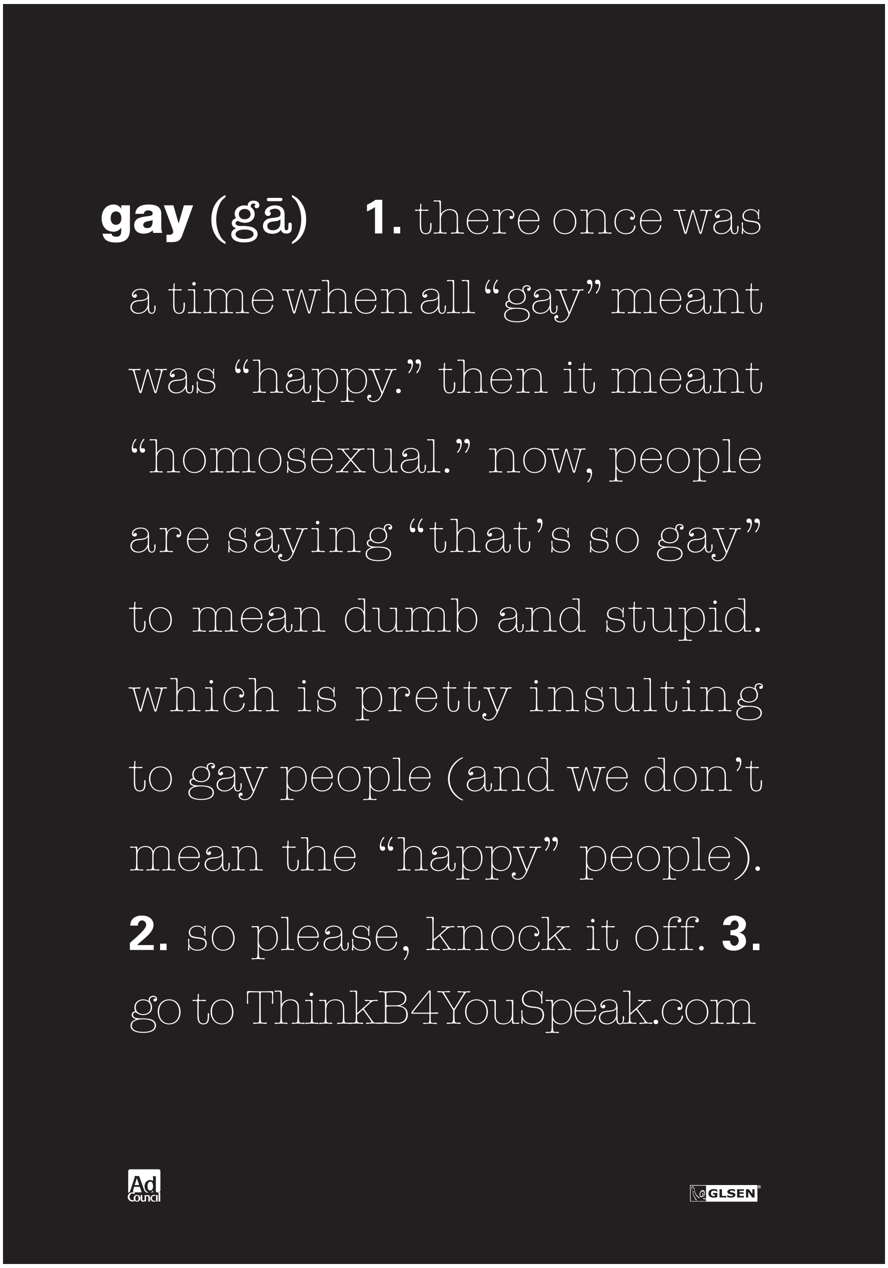


Teens said the campaign's use of "knock it off" as a tagline was effective because it was consistent with how they speak.

ness of GLBT slurs) without being seen as preachy. Teens "got it" and expressed a desire to change their behavior. Emily, a ninth-grader in Wisconsin, wrote, "I say [gay] and so do my friends. I never thought of it that way though and now I feel bad ... I still think they might say that because it's habit right now. But they might not say it as much or would think before they said it."

Teens shared that the use of humor and comedians in the TV ads definitely helped the message get through. One of the youngest participants, Emily, a seventh-grader in California, shared, "I really liked the TV commercials. I thought they would help the most. I think it would help some kids not to say [gay]. I think no matter what, they would start thinking it was wrong to say this." Keana, a ninth-grader in Indiana, wrote, "[The Ellen DeGeneres TV ad] is easy to relate to, has some humor, and is effective because I thought about its message afterward. I think it would cause teens to think twice next time before they speak and realize what they say can affect the people around them." And the ad's direct, powerful call to action was said to be consistent with how teens speak and resonated very well. "[The 'knock it off' line] is good. It has that 'cool teen vibe to it,'" said Genya, a tenth-grader in North Carolina.

Respondents helped strengthen the campaign's ability to grab attention by suggesting stronger visuals and copy for the "That's So" print ads, which played off the "That's so gay" phrasing to drive home the point that seemingly offhand comments can be hurtful to others. Familiar stereotypes of a football player and a cheerleader (tested in outdoor ads) were seen as more attention-grabbing than the originally proposed "Quirky Girl" and "Hipster Guy" concepts for the print ads, therefore the football player and cheerleader became the key visuals for the print executions.

Some of the phrases used in the ads were seen as "not how teens talk," so learning was obtained on what would be more relevant phrasing. In addition, participants shared that, while they liked the strong visual impact of these ads, they were too wordy and a bit difficult to read.

Making the message relevant to teens was also extremely important, and the research shed light on how to best accomplish this. Specifically, incorporating familiar teen situations in the TV ads (i.e., a group of teens at a pizza shop, two teen cashiers talking as they worked) and recognizable school frameworks (i.e., a dictionary-style print execution) engaged teens because the message was on their terms. Mack, a tenth-grader from New York, wrote, "[The dictionary print ad has] a learning tone. I think the ad just wants kids to understand how words can hurt and we need to understand the meaning of what's being said out of our mouths."

To make the campaign especially relevant to teens, the Web site was identified as a key area that needed improvement; teens suggested more interactive features and teen-appropriate messaging.

Finally, new channels of communication were identified as additional avenues to reach teens: in-school and movie theatres. Kevin, a ninth-grader in New Jersey, stated, "School is probably

the best place to start because kids act different in school than they do at home. I hear a lot of kids cursing in school that would never curse in front of their parents."

Research was completed in April 2008, and the campaign launched nationally in October 2008, including three TV spots, two print campaigns with three executions each, three radio spots, a campaign Web site (www.think-b4youspeak.com) with viral videos and interactive content, and promotional materials for educators/schools and parents.

A multimedia strategy was used to ensure the campaign would break through to teens. Included in the campaign are humorous TV public-service announcements that star Hilary Duff and Wanda Sykes interrupting teenagers who use the phrase "That's so gay." Early reads on Web site traffic and visit duration have been strong, indicating that the online content is engaging teens. The campaign has received widespread media coverage, including CNN, *The New York Times* and TV shows *The View*, *Entertainment Tonight*, *Good Morning America*, *The Today Show* and *The O'Reilly Factor*.

In recognition of the campaign's strategic and creative excellence, "Think B4 You Speak" received the Ad Council's 2008 Golden Bell Award, beating out more than 50 Ad Council campaigns from the past year.

Open up and share

Overall, the online one-on-one research methodology allowed teens to open up and share their honest reactions in a safe environment where they were not being judged by their peers. They appreciated being probed about their responses and given the chance to explain themselves more fully. And, in the end, this resulted in better feedback and more data for the clients. "It was a very trustworthy source of learning that we keep going back to many months after completion," says Jamie Tally, vice president, director business leadership, ArnoldNYC. | Q

travel and hospitality research

By Jim Quilty

Riding out the storm

How the travel industry is coping with today's recession

Editor's note: Jim Quilty is vice president - travel and tourism research in the New York office of research company Ipsos. He can be reached at 585-224-5897 or at jim.quilty@ipsos.com. To view this article online, enter article ID 20090504 at quirks.com/articles.

snapshot

Drawing from research with business and leisure travelers and conversations with travel industry firms, the author explains the impact of the economic downturn and explores the role of travel companies' marketing research in these difficult times.

According to recent data from the Commerce Department, for the first time since the terrorist attacks of September 11, spending on travel and tourism has declined. We're of course deep into a recession - at the time of writing in February, unemployment had reached 12.3 million Americans and the unemployment rate hit 8.1 percent. Americans are reducing their travel frequency and spending, a strong dollar is keeping foreign tourists away and with every industry looking for cost savings, businesses are slashing their travel expenses.

Travel is a trillion-dollar industry in the U.S., employing millions of people. It is reeling, and searching for ways to lure travelers back with deep discounts and special packages. The effects are rippling through the industry, impacting boardrooms, marketing departments and their approach to market research. Indicators of public opinion show that the majority believe economic improvement will happen later, rather than sooner. How does consumer opinion translate to spending and when will it change? Faced with a public that's fearful and reluctant to spend, what are businesses doing to cope? What does it mean for us as market researchers?

Debated and answered

Each year, as part of any company's annual planning process, questions regarding market research initiatives are debated and answered, including:

- Should our tracking studies be renewed, consolidated or canceled?
- Is it time to segment our customers again?
- Do we test the market in response to planned advertising, innovation or new product launches?
- Should we scale back on primary studies in lieu of more syndicated offerings?
- Do we implement more automation to help us survey our own customers?

Then, every decade or so, a recession enters the picture and things change drastically. In recent talks with travel companies, it has become apparent that our current recession has added a new dimension to the questions being asked of and by market researchers. To help make sense of these changes, first let's review current consumer behavior.

Significant pressures

Throughout 2009, consumers will be concerned about the economy. Some have already faced significant personal financial pressures and this uncertainty will continue to impact travel spend and frequency in the months to come.

In a recent Ipsos survey of 1,572 U.S. adults, a majority of consumers (59 percent) do not feel that the economy will show signs of improvement until more than one year from now. While another 29 percent feel improvement will occur between seven and 12 months, only slightly more than one in 10 (13 percent) think the economy will improve within the next six months.

The fallout from the credit crisis has impacted many Americans in a variety of ways. Approximately four in 10 (38 percent) say that they or their spouse have experienced one or more of the following economic event(s) in the past six months, including:

- a reduction in their salary or a reduction in their work hours (19 percent);
- loss of employment and are still unemployed (13 percent);
- loss of employment and only working part-time (8 percent);
- have become delinquent on mortgage payments of primary residence (6 percent);
- an increase in mortgage payment for primary residence resulting from an adjustable rate mortgage (4 percent);
- have sold or are planning to sell a second home or interest in a vacation home (3 percent);
- primary residence has been foreclosed upon (2 percent).

Consumer spending comprises two-thirds of the U.S. gross domestic product, with travel and tourism comprising one of the largest components of a household's discretionary spending. The uncertainty of potential job losses and residential mortgage pressures impacts how consumers perceive the economy.

Figure 1

Consumer Sentiment Impacts Travel Plans

	When Do You Feel The Economy Will Improve? Within 6 Months	7 to 12 Months	1 Year or More
Among Business Travelers Who in 2009 Feel That the Financial Crisis Will...			
Cause Me To Reduce My Overall Business Trips/Expenditure (39%)	13%	23%	64%
Not Have Any Impact on Planned Business Trips/Expenditures (54%)	33%	23%	44%
Base: Plan to Take at Least 1 Business Trip in 2009 (n=337)			
Among Leisure Travelers Who in 2009 Feel That the Financial Crisis Will...			
Cause Me To Reduce My Overall Leisure Trips/Expenditure (52%)	7%	29%	64%
Not Have Any Impact on Planned Leisure Trips/Expenditures (43%)	19%	28%	53%
Base: Plan to Take at Least 1 Leisure Trip in 2009 (n=1,277)			

More willing to plan

Consumers who are optimistic in the near term are more willing to plan vacations or conduct business as usual. Unfortunately for the travel industry, far too many leisure and business travelers do not feel good about the about the economy in 2009 or have recently experienced a personal economic hardship.

As shown in Figure 1, among those 39 percent of business travelers who plan to reduce their overall business trips and/or expenditures, 64 percent do not feel the economy will improve until next year, as compared to 13 percent who feel the economy will improve within six months.

By contrast, of the 54 percent of business travelers who feel the financial crisis will not have any impact on their overall business trips and/or expenditures, 33 percent feel the economy will improve within six months, and only 44 percent feel the economy will take more than one year to improve.

Among the 52 percent of leisure travelers who plan to reduce their overall leisure trips and/or expenditures, 64 percent also do not feel the economy will improve until next year, as compared to only 7 percent who feel the economy will improve within six months.

Contrast that against the 43 percent of leisure travelers who feel the financial crisis will not have any impact on their overall leisure trips and/or expenditures: 19 percent feel the economy will improve within six months, whereas 53 percent feel the economy will take more than one year to improve. Perhaps not surprisingly, of the 43 percent of leisure travelers who feel the financial crisis will not have any impact on their overall leisure trips and/or expenditures, some 73 percent have not recently experienced a personal economic event.

Faced with this economic uncertainty, many consumers are taking action on what they can control: the amount they spend on travel.

Significant differences

How will business and leisure travelers reduce their travel expenses this year? Of note, as shown in Figures 2 and 3, significant differences exist. For business travelers, staying at a less-expensive hotel brand tops the list (61 percent), while among leisure travelers, this measure ranks sixth (45 percent). In contrast, the top way leisure travelers intend to save on their expenditures is to spend less on meals and entertainment (66 percent). Among business travelers, this measure ranks last, with just 2 percent of travelers saying they intend to cut business expenses this way.

Despite some clear differences in how travelers intend to save on business versus leisure expenses, strong similarities also exist. Reducing the number of nights away from home ranks as the second-most common way travelers intend to reduce their leisure and business expenditures (58 percent and 57 percent respectively), while staying with friends or family more often ranks as the third-most common way travelers plan to lower their leisure and business expenses (51 percent and 41 percent respectively).

This data tells a story that travelers are looking for more options. They are challenging their existing brand loyalties, becoming more loyal to their wallets.

Unwavering commitment

So how are the travel brands coping? Two common themes have emerged among companies we have spoken with. The first is an unwavering commitment to deliver on their brand promise and value proposition. They see these uncertain times as a way to differentiate themselves from the competition.

The second is a desire to capture market share. Some companies have accelerated the launch of advertising campaigns because they feel their messaging will resonate with a wider range of value-seeking consumers. Once they get consumers to experience their product and service, and deliver a positive experience, they believe strongly in their ability to be in the consideration set of these consumers in the future.

It is very clear that, with few exceptions, all sectors of the travel industry are offering aggressive price reductions. If you have not traveled for leisure or business lately, either pick up the newspaper or go online to any travel provider or intermediary and you'll see extraordinary offers. This helps explain the Commerce Department data showing that industry-wide prices in Q4 2008 fell 16 percent at an annualized rate, which more than reversed the third quarter's gain.

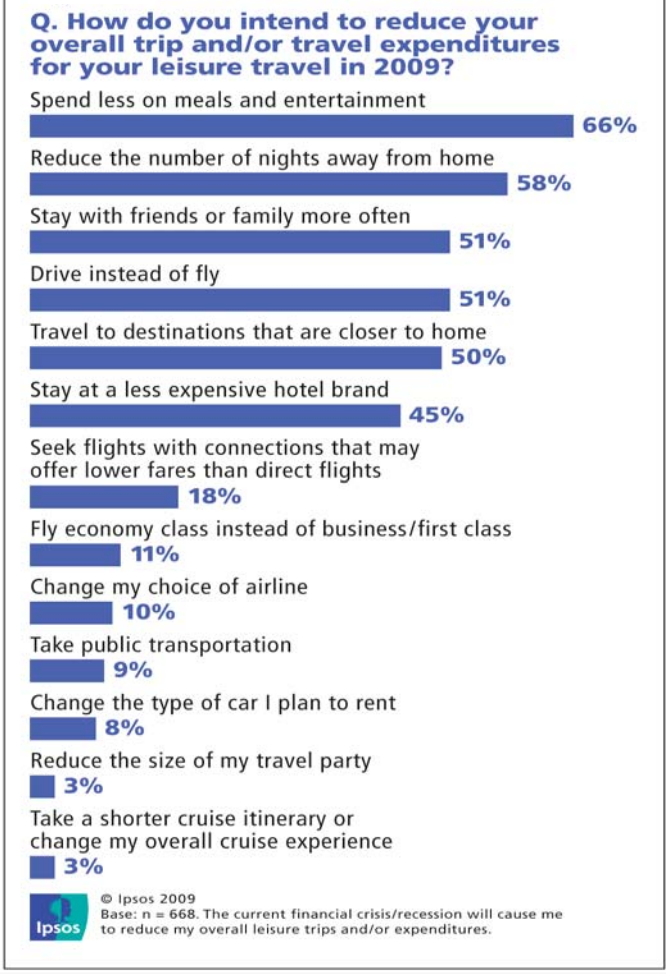
Brands that initiate price reductions do so for a variety of reasons: to defend or gain market share; to respond to competitive offers, and to survive financially. Pricing, however, is only one part of the solution.

Travel brands understand that they must work through this recession together with customers. Their efforts to empathize with travelers and offer value packages have also been well documented. For example:

- An airline offers a full refund to any customer who becomes

Figure 2

Figure 3



unemployed after booking a flight.

- A cruise line offers "travel protection," providing cash reimbursement of cancellation fees to guests who cancel because of job loss.
- Online travel agencies offer flights without booking fees.
- Theme parks and hotels offer a free night for visitors who book a minimum number of nights - sometimes as low at two or three.
- Hotels and airlines promote generous loyalty point giveaways and reduce or eliminate blackout dates on reward redemptions.
- Car rental companies offer upgrades to higher-end vehicles.
- Luxury hotel brands offer access to concierge clubs, brunch specials or tie-ins to local attractions.
- Destinations, seeing a reduction in out-of-town visitation, are launching outreach programs to residents to encourage participation in local attractions and events.

Other solutions

Among the travel-industry companies we've spoken with recently, other solutions are being implemented across a spectrum of corporate, employee and market research initiatives.

Travel companies have a good read on future bookings in comparison to prior years, and those bookings have been off significantly. Therefore, most companies started moving aggressively to align cost structures with reduced revenues. At a broad level, this has meant headcount reductions, deferment of capital expenditures and reorganizations designed to streamline operations and drive efficiencies.

On the labor front, leisure and hospitality establishments shed 300,000 jobs during the recession, reducing total employment in the industry from 13.5 million to 13.2 million, according to the Labor Department.

Companies are turning to their chief procurement offices with mandates to leverage buying power, renegotiate contracts and source lower-priced goods and services. One company reported that "no stone has been unturned" in their quest for cost savings. Common examples travelers have noticed include hotels which have removed free coffee from their lobbies or have removed some room amenities. Rather than provide complimentary services up front, some hotels encourage guests to call the front desk if anything is needed.

From a marketing standpoint, companies are adjusting their advertising. Many are moving away from selling over-the-top or indulgent experiences and instead are shifting toward a more subdued value offering, appealing to the more thrifty and discerning consumer of today.

Other companies view today's environment as an opportunity to help them really focus on their message and who they are as a com-

pany. In the view of one brand we spoke with, consumers who travel in today's economic environment are considered core travelers and therefore marketing and service initiatives are being implemented to give these travelers a reason to select their brand for the next trip.

Calm the anxiety

Employers are having frank discussions with their employees on the state of the business, trying to calm the anxiety inherent to an industry that is laying off workers yet needs a motivated workforce to deliver quality service to guests.

Most companies we spoke with continue to offer rewards and recognition to their employees. In fact, they've made these programs more visible. Employers consider it an essential part of keeping employees motivated in these stressful and uncertain times. This especially holds true for front-line employees and all those who interact with customers. Company leaders are communicating the need to treat all customers with extra care, knowing they may only get this one opportunity to deliver a satisfying experience.

And guess what: Some companies are actually reporting increases in satisfaction scores during the recession! Four distinct dynamics are at play here. The first is a function of reduced prices across the board for travel services, which, whether we like it or not, impacts customer satisfaction these days. Second, reduced volumes mean that customers are being offered, or have available to them, upgrades (first-class on an airline, a hotel suite, larger rental vehicles or higher-end cruise cabins, etc.), which translates into a better-than-expected experience. The third relates to the perception that customers feel they are being better attended to and are receiving greater appreciation by travel and hospitality employees. Finally, for customers who are experiencing a brand for the first time (for example, an economy or midscale hotel brand in lieu of an upscale brand), their experience may prove satisfactory and worthy of repeat business.

Some travel-related companies have reduced or eliminated their 401(k)-matching programs to help conserve company cash, and for the most part employees understand this decision. Both within and outside the travel industry, many employees hold underwater stock options, and more and more companies have or are considering a re-pricing of the options to current stock prices.

If layoffs occur, companies are finding ways to do so in the most thoughtful and dignified manner, by offering severance, outplacement services and contracting opportunities. The perspective is that companies want to rehire these laid-off employees when business returns.

Must cope

Market research practitioners must cope with measuring the new advertising, operational and service changes their companies are implementing to reduce costs. The questions being asked include:

- To what degree are customers accepting our service-level changes?
- What promotions appeal to consumers in today's recession?
- Do our price reductions produce an unintended consequence of introducing a different competitive set?

Many travel and hospitality companies have reported that guest expectations are not declining - rather just the opposite. Consumers today are stressed due to lack of job security, decimated investment portfolios and declining home values. They view travel as a brief and needed respite from all the pressures around them. Throughout the entire travel experience consumers want to be treated better than they ever have been. The challenge for the market research practitioners is to determine - very quickly - whether their brands are delivering on these ever-increasing customer expectations.

Companies within the travel industry span the range of having significantly reduced their marketing and research spend, to holding the line on research, to actually adding supplemental studies. As a result of the operational and service changes made, many organizations feel their need for knowledge has intensified.

Significant reductions in research can be a function of a company's balance sheet and cash flows. Highly leveraged organizations find it most difficult to fund marketing programs when their immediate priority is meeting interest payments and pending debt obligations. For other companies, depending on their exposure to market share and rate declines, tracking studies are being consolidated to focus on only the core insights needed to survive this recession.

Examples where investment in marketing and research is slowing down include more long-term projects involving innovation or new product launches. Companies are not abandoning these efforts, they are just being more thorough with customer feedback, and they are being patient for demand to rebound - all in an effort to justify and demonstrate ROI. Other firms are maintaining current tracking studies but mining the data for insights to a greater degree than before, in hopes of stretching the value of their investment.

In what areas is market research investment actually increasing? Some companies are:

- Adding a qualitative element to quantitative studies to learn the whys behind consumer decision-making.
- Adding companion studies to existing loyalty trackers to determine whether operational and service changes are within tolerance levels or are resulting in defectors.
- Considering more active and visible monitoring of the linkage between customer satisfaction and employee satisfaction. Companies are keenly interested in knowing if the operational or service-level changes recently implemented impacted what customers felt was very important to them or if the service commitment was not

communicated or delivered effectively. By evaluating employee satisfaction alongside customer satisfaction, companies are able to better assess where to make critical changes given limited resources.

- Investing in platforms to allow for more frequent and flexible online surveying of their massive customer databases. This helps companies better justify the marketing and research dollars they do spend.

See the risks

Market research practitioners see the risks and opportunities afforded in today's recession. Take business travel as an example. Technology could replace a percentage of the business travel market as companies get more comfortable with Web-based meetings, or it could force venue changes for a sustained period of time. For example, will more companies book their corporate meetings at local venues in lieu of resort destinations or cruise excursions?

The "unmanaged" traveler is a customer segment not bound by corporate travel mandates, one with more flexibility to select different brands. If these travelers were accustomed to staying at an upscale hotel brand, for example, they may find their experience at a midscale brand very appealing and satisfactory, even surpassing what their expectations were. This opens the door for market share shift. The upscale brands therefore must decide whether or not to compete on price. The midscale brands must decide whether to adjust their advertising to more directly compete with the larger brands.

On the opportunity side, market researchers realize that any new research program or technique they implement may very well gain familiarity and traction within their companies. Practitioners feel the added pressure to quickly produce reliable results, even if new market research approaches are being implemented. However, they view the renewed debate and focus on the value of market research as worthwhile and say it helps create an invigorating and dynamic environment in which to work.

Bright sides

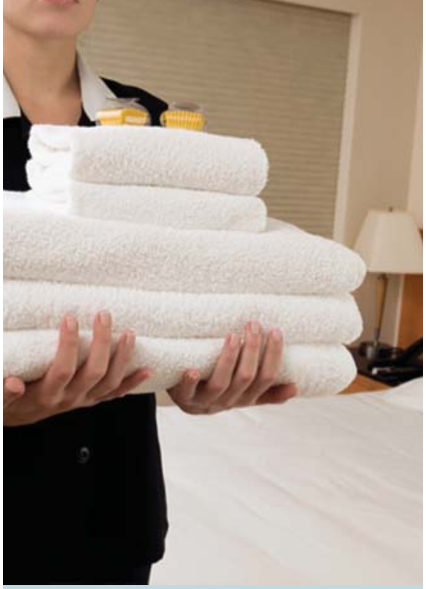
There are bright sides to this recession. Travelers are being afforded promotions and offerings today that are normally not available, and many are trying new brands or enjoying their favorites at much lower price points. This helps add to the enrichment of the travel experience.

Also, travel companies are becoming creative and implementing changes to their business models. These changes require measurement and monitoring. As a result, market research is becoming the recipient of greater appreciation and relevance throughout the travel industry.

Although the current recession has dampened the travel industry, it has presented the market research practitioners with fascinating challenges. | Q travel and hospitality research

Knowing when to say when

For hotels cutting back on services to trim costs, how far is too far?



By Lincoln Merrihew

For the first decade of this new millennium, the travel and hospitality industry has had a bumpy ride.

The terrible events of 9/11 created a mass aversion to air travel. A tsunami in Asia and hurricanes in the Gulf of Mexico created their own consumer anxieties. Gas prices rose inexorably throughout the decade until late 2008. Then they plummeted again, but only after our toxic debt fallout undermined the entire global economy. The financial services industry now teeters on the edge of implosion; easy credit has disappeared and corporate revenues with it. Corporate America is battening down the hatches, reducing labor forces and hacking away at discretionary spending.

One of the more notable measures of the net impact of recent changes is the Consumer Confidence Index - as gathered by TNS for The Conference Board - which is at an all-time low. At the time of writing in February, it stood at 25, down from 76.4 a year ago (1985 = 100).

Readily downgrade

Like almost every industry, the travel and hospitality industry has felt the impact of this recent economic meltdown, with fewer guests and lower revenue. In many ways it has been affected more because it is an industry based largely on discretionary spending. Consumer and business customers can readily downgrade travel arrangements, such as staying at lower-tier hotels or replacing overnight travel with day trips. They can also postpone trips or even cancel travel entirely. Veteran road warriors are setting aside their executive platinum cards and reverting to conference calls, videoconferences and cheaper flight and hotel alternatives. Sales conference attendance is being scaled back and events are being held at more modest locations.

The cuts are driven by the need to reduce expenses as well as to set an example. After all, what public company executive in this environment wants to be seen as sponsoring "boondoggles" when consumers are outraged by perceived corporate irresponsibility and expressing their umbrage to anyone who will listen?

With fewer travelers and lower revenue, hotels have had to quickly

snapshot

Results from a survey of prospective travelers show that some hotel amenities are more valued than others. As travel-industry firms look to cut costs, research can provide needed direction on where services can be reduced, re-priced or eliminated, as across-the-board changes run the risk of alienating large customer segments, possibly permanently.

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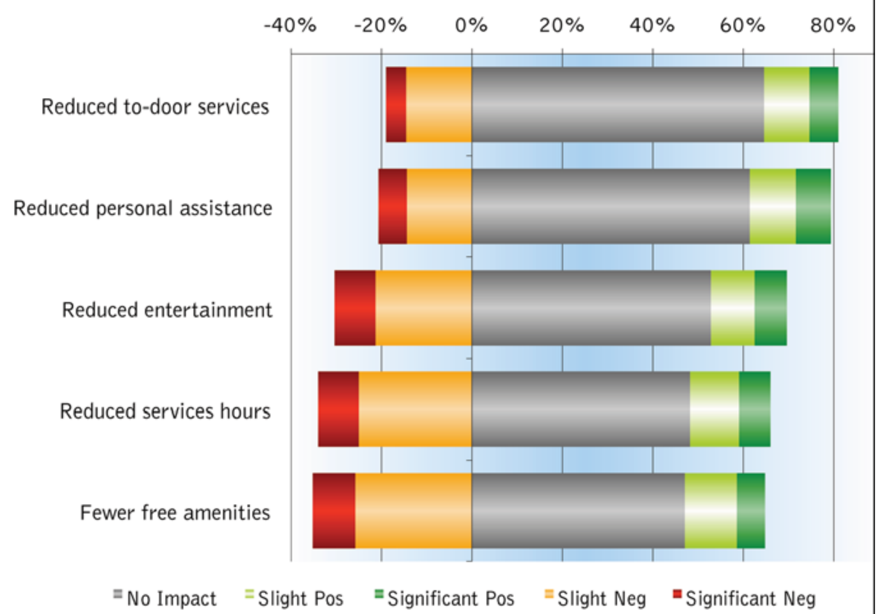
trim expenses. Since fixed assets (such as rooms) are not a viable option to cut, the reductions have to come primarily on the service and amenities sides.

However, just slashing the biggest costs can be more damaging than doing nothing at all. Consumer attitudes, wants and needs should guide the hand that wields the scalpel. Specifically, the industry needs to understand which things it can reduce or cut that have the smallest impact on customer hotel choice. The skill is in finding the most effective way to cut with precision, and that comes through research and analytics within the context of both the industry and the recession.

Figure 1: How the Following Would Impact Hotel Choice



Impact their choice

To assess the safest places hotels could cut costs, TNS surveyed 2,500 U.S. adults in February 2009 to identify how changes in hotel services would impact their choice of a hotel. The survey included both negative and positive impacts, because in today's business climate some consumers may view a company trimming costs as a positive and responsible act. Choices were limited to following:

- reduced entertainment (such as fewer free TV/movie channel options or pay-only Internet service);
- reduced to-door services (such as having to go to the lobby to get a free newspaper and not having in-room automatic checkout on day of departure);
- reduced personal assistance (such as porters and concierge staff);
- reduced free amenities (such as only shampoo and soap available for free);
- reduced hours for services (such as room service, restaurants; hotel store and business center open for significantly fewer hours).

The results show that the safest area in which to make changes is to reduce to-door services and reduce personal assistance (Figure 1). Those two areas have the highest share of "no impact" results and have positive impacts nearly equal to the negative impacts - suggesting a nearly net neutral impact overall. Both changes have staffing elements and implementation could mean staff reductions. In response, guests might have to pick up their bills and newspapers at the front desk rather than having them delivered to their doors. The biggest area of risk would be cutting free amenities. Over a third of respondents reported that fewer amenities would negatively impact their hotel choice.

Note that the results above are across all respondents. Slicing the results by segment or demographic cohort revealed actions potentially better-aligned with a hotel's core customers and targets. For example, younger respondents reacted the most negatively to reductions in free amenities (Figure 2). Nearly half under the age of 30 reported a negative impact from reduced amenities compared to fewer than a third of the oldest respondents. This suggests that hotels with an older clientele face less of a risk on cutting costs in this area than do those with a younger clientele. It is likely that results for the other choices (such as reduced entertainment) will vary as well, with potential variations by age, income, the extent to whether travel is for business or pleasure, etc.

Best positioned

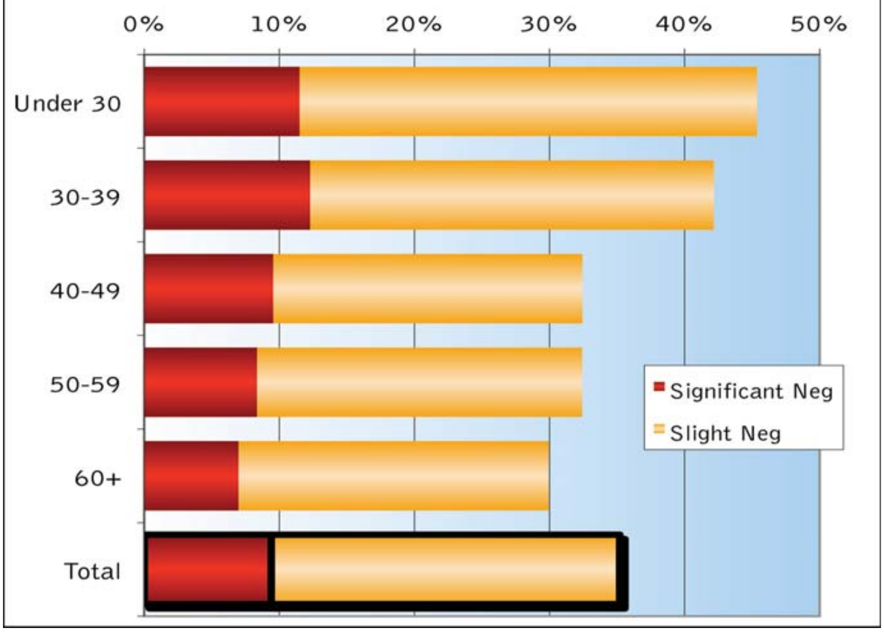
The magnitude of the recession, coupled with the discretionary nature of spending, means that the travel and hospitality industry needs to act quickly and decisively. Still, industry executives must walk a fine line and achieve operating efficiencies while avoiding alienating customers. Accomplishing this feat could mean that when the economy does rebound, they will be best positioned for a rapid and cost-effective recovery.

While the before-mentioned results indicate suggested actions for the hoteliers, a similar research approach can be used for other facets of the travel and hospitality industry. The data-gathering mechanism could include additional choices and should include open-ended questions.

Also, as noted in the research, expected results can vary based on consumer segment. Research on the impacts of cost-saving measures needs to ensure that responses from the target audiences are isolated; this will be pivotal in making the right choices. Note also that the research included all adults and did not exclude anyone who, for example, had not traveled in the past 12 months.

A logical next step would be to compare the risks of reducing expenditures on any of the above

Figure 2: How Cutting Free Amenities Would Impact Hotel Choice, By Age



with the related potential cost savings. For instance, if a greater cost savings is realized by reducing personal assistance than by reducing to-door services, cutting personal assistance would be the logical first choice. Each hotel needs to identify the correct ranking for their brand and category and then compare the net impacts to their specific costs.

Broader research effort

The above results are informative but directional. To maximize actionability, the questions should be included as part of a broader research effort which would include differentiating responses for leisure travelers from business people and comparing the results for near-term travelers with those whose travel is farther in the future.

The questions could also include elements of price sensitivity, such as the extent to which consumers would accept changes based on accompanying changes in price. For example, the same questions could assume no change in room rate and then be compared with different increments of lower room rates. The opposite is also true: the research could explore how much customers would be willing to pay extra to keep certain services that might otherwise be cut.

Questions also need to include the impact of brand and brand image. Consumers may be more willing to accept reductions in services from some brands than from others based on how they assign what TNS calls brand permission, which refers the extent to which consumers will allow a brand to stretch into new areas based on their perception of it. (For example, while consumers may accept that dollar-menu items are consistent with the brand, they would most likely not accept $30 porterhouse steaks from McDonald's.) In other words, budget hotels may have greater leeway in cutting certain services than do premium hotels.

Massive shifts

TNS research across several industries in the travel and hospitality space has shown that the changes are broader and deeper than many may realize. This includes massive shifts in consumer choices, including not only how they spend their travel and hospitality dollars but also where those dollars are spent. While hotels are addressing ways to cleverly reduce costs, they need to recognize that they are aiming at a moving target, thanks to the rapid changes in customer bases. For just as companies may lose some customers who move down-market, they may gain new customers who defect from up-market rivals.

Unfortunately this means that even off-the-shelf research may have limited applications – at least until the economy stabilizes. Any new research should include questions designed to increase the shelf life of the responses and incorporate modeling that allows the assessment of what-if scenarios to help manage the business while the recession lingers and also as the economy starts to recover.

Must rethink

As the travel and hospitality industry regroups, executives must rethink how they operate across several areas. They need to connect with and optimize revenue from customers who are changing grades. At the same time, they need to keep current customers engaged to prevent them from defecting. Key action areas include:

- innovation: new products and services and refinements to current ones;
- communication: messaging that reacts to and reflects changing customer needs and motivations;
- acquisition: ensuring that the reservation process and experience is consistent with changing customer needs;
- satisfaction: refining satisfaction and loyalty-driver measures given the fluctuations of customer types and market conditions.

As painful as the current situation is, companies that address the areas above and make the effort to stay in touch with the needs of their various market segments, while offering new and compelling reasons to choose their brands over others in a crowded marketplace, will be ideally situated when the rebound arrives to build brand, capture greater market share and operate in a more customer-focused manner. | Q

qualitative research

In my professional opinion...

Adding 'prosumers' to your groups can provide a creative boost

By Steve Richardson

A number of years ago, British Airways was looking to challenge American Airlines and Virgin Atlantic for dominance of business-class travel on the airlines' transatlantic routes. The qualitative research being conducted with consumers was not getting the research team the kind of insights they were seeking. They decided they would need to shake things up if they were going to achieve any breakthroughs that would help British Airways differentiate its business-class travel experience.

The research team took an unusual step. They set up focus groups that involved the usual target - regular business travelers. But they added product-development and marketing professionals who frequently traveled from New York to London, precisely the kind of professional that would typically be intentionally screened out.

After a joint focus group that included both consumers and these "prosumers," the prosumers group joined the British Airways leadership team for a gloves-off creative session that incorporated what was learned in the focus group, but also took into account the prosumers' understanding of the types of informed, innovative thinking the research team was seeking.

One of those prosumers, Georgette McAuley, research and development director at Unilever, shared that when she travels, she likes a seat that fully reclines but does not like to be sleeping in full-recline mode next to strangers or business associates. And she presumed that many women travelers would probably agree with her. From that observation, an idea was born. And now, seats that cradle passengers and pullout privacy panels are designed into almost all international business-travel sections.

"Her professional experience - understanding demographics, knowing that we were looking for breakthrough ideas - and her ability to express her ideas in a useful way to the research team made her a key part of the process," says Christopher Miller, founder of Lancaster, Pa.-based Innovation Focus Inc. "That creative tension, where respondents speak both personally and as a professional, has become the foundation of this process."

This approach, labeled by Innovation Focus as the "slingshot group process," was the focus of a presentation given by Miller at

snapshot

Under the right circumstances, including - rather than excluding - marketing professionals normally screened out of focus groups can lead to breakthroughs. Examples from British Airways and WD-40 are cited to illustrate how this approach has helped develop new products and services.

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the 2008 annual conference of the Qualitative Research Consultants Association. The technique uses four different types of participants (consumers, prosumers, project team members and a facilitator/moderator) and two different processes (focus groups followed immediately by creative problem-solving sessions) in continuous time in an attempt to achieve breakthrough ideas.

McAuley says she found the session invigorating. "For me it was cathartic. As a road warrior, I have a lot of opinions about travel, so it was a relief to get some of those opinions off my chest," she says. "Having spent many hours in the back room myself, it was fun to be in the front room."

Creative roles

Miller says there are three characteristics that that make this approach useful. The first is the introduction of prosumers in both consumer and creative roles. Prosumers' informed opinions and intuitions help researchers better understand the consumer experience. The second is the intentional development of creative tension when prosumers and project team members move from the consumer experience into the role of creative idea generator (the "slingshot"). The third is the close proximity in time of the qualitative research session and the creative problem-solving session. This optimizes the creative tension and the output of ideas and it takes advantage of the immediacy of what was learned in the focus group.

Focus group experiences typically rely on residual memory, which can be colored by natural predispositions. So taking the next step - the creative ideation - right away allows the team to take immediate advantage of the learning that came from the focus groups.

"The core idea here is to involve people who are both naïve and informed," says Anne Orban, Innovation Focus Inc.'s director, discovery and innovation. "Their professional take on things can be tremendously valuable, and ideas that come out of the creative sessions can be just the breakthrough that researchers and clients are seeking."

The marketing team at WD-40 Company got precisely that - breakthroughs - when they used the process to help with their product development efforts. Their project involved WD-40 Company professionals, two prosumers and a small group of consumers. In the creative session following the focus groups, it was a prosumer who wondered whether the lubricant could be put in a handheld pen format. That outside-the-box idea is now known as the No-Mess Pen. And another prosumer who needed to cover a very large piece of equipment with WD-40 tossed out the question of whether the product could be put into a bug spray-style fogger. The answer was yes. That business-to-business product is now called the Big Blast Can.

"I enjoyed working both sides of the mirror," says WD-40 Company Executive Vice President Graham Milner. "Being able to observe in the traditional manner but then also participate together made the process more collaborative and team oriented. We really benefitted from losing the 'us' and 'them' structure."

Miller and Orban say that there are several key traits to look for in a prosumer, including no conflict of interest, a consumer connection with the topic area, knowledge relative to the topic, experience with new-product development and creative problem-solving skills. "Getting the right prosumers is not easy, nor is the research itself easier with prosumers," Orban says. "These groups of professionals can be very smart and cut right to it, but they are also usually tougher and more direct. It's not the easier road, but the benefits can be enormous."

Clear understanding

When choosing to recommend the prosumer approach to research, Miller says it is critical to communicate a clear understanding of why the methodology has been selected, how it differs from the typical process and how the expected outcomes can differ as a result. Managing expectations is critical because it is common for those expectations to be high with a high-profile prosumer participant and lower with a lesser-known, although equally qualified, prosumer.

A similar pitfall exists when project teams seek out prosumers who are an exact match for their project. "It is important to bring fresh and challenging perspectives to the table, so consider prosumers whose core competencies are more tangentially related to the topic," Miller says.

In one example, Miller was working with a manufacturer who wanted to explore diaper-changing contexts, and the client was not initially sold on the idea of recruiting a male designer from Black & Decker even though that prosumer had two children under three years old. At that time, men were not seen as diaper changers. As it turned out, the designer – who had helped create the Black & Decker Snake Light – had a lot of experience changing diapers. His insight as a product designer and diaper changer resulted in his recommendation of needing a "third hand." That same insight had been instrumental in developing a product to deliver a focused light source when both hands were already occupied. It also had immediate applications in the world of diaper changing.

Quality ideas

Knowing when the prosumer research approach might be the right answer is important for researchers to understand. Miller and Orban say it should be considered when a project topic needs quality ideas in a short amount of time using firsthand consumer insights. Another instance to consider prosumers is when the research process is not yielding the kind of answers being sought – when the research needs a boost of creative new thinking.

"The technique is an effective tool in the discovery phase of product development to identify product opportunity gaps by offering research team members easy exposure to consumers' needs and then immediately turning those insights into product ideas," Miller says. He adds that it can be used to jump-start the work of product modifications and extensions by gathering information in focus groups and immediately applying that to solicit ideas for second-generation products.

Many prosumers are advocates of the approach. "It works because I have a sense of what they are after," McAuley says. "I did not use that knowledge to screen my comments to the group. In fact, I was more direct, and that direct, informed approach produced the kind of insight they really wanted."

WD-40 Company's Milner liked the process so much that he has participated as a prosumer several times since. "I loved being part of another business and contributing as both a consumer and prosumer. After seeing this process work for my own company, I'm certainly willing to help other organizations achieve the benefit we've seen." | Q

The full WD-40 story

Enter article ID 20060301 at www.quirks.com/articles to read more on how research helped WD-40 develop a host of new products for specialized uses.

quantitative research

Address objectives without objections

Considerations when constructing a questionnaire

By Neil Kalt

Every questionnaire has two overriding goals. The first is to keep respondents on-task - to hold their attention as they move through the questionnaire, keep them focused and get them to answer each question honestly. The second is to generate data that fully addresses the study's objectives.

Achieving the second goal is the key. The sole purpose of achieving the first goal is to make achieving the second possible. How do you achieve both goals? By forging a questionnaire that is well thought-out; that is clearly, logically and succinctly written; that is constructed with the study's objectives in mind; that is always user-friendly; and that, if the stars align, has moments of ingenuity and imagination. The considerations that follow are intended to provide you with the tools and insights to construct questionnaires that satisfy these criteria.

1. A study's objectives are its first and most important consideration. They drive the research design, the construction of the questionnaire and the analysis and interpretation of the data. Which is why this bears repeating: when constructing a questionnaire, the key question is always: Will this questionnaire generate data that fully addresses the objectives of this study? Keep asking yourself this question as you construct the questionnaire.

2. Each question should be clearly written, in plain English, free of jargon and without ambiguity. Any question that falls short of this requirement may lessen the validity of the questionnaire. Unfortunately, writing clearly is easier said than done. A key reason is the gap that usually exists between the clarity with which we think we write and the clarity with which we actually write.

There are several things we can do to narrow, and possibly close, this gap:

snapshot

The author touches on 11 points to keep in mind during questionnaire development, stressing clarity (of scale and of question-wording) and a respect for the respondent's time and patience above all.

- Be aware that it exists. It'll make you think more critically as you write and it'll get you to review what you've written with a more discerning eye.
- Ask at least one person whose judgment about the written word you trust to look at your questionnaire and, as warranted, suggest changes.
- Personally administer your questionnaire to a few people. If you ask, they'll tell you whether the questions are easy to understand

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and whether they're saying what you want them to say.

3. Try to write questions the way you speak, in a conversational style. It should make it easier for respondents to understand the questions and answer them, and it may help to keep them interested. One way to get an idea of how close you've come is to read it aloud and listen carefully to how it sounds – you want it to sound as if you're conversing with someone rather than reading aloud to them. Another way is to try it out on a few people and ask how easily it reads.

4. Every questionnaire should have a logical flow to it, should make intuitive sense as the respondent moves from one question to the next. One technique is to order them in a way that's consistent with how most people would approach the subject at hand. For example, if you're asking about a particular product, you might begin with questions about awareness, then move to questions about expectations, then to a purchase decision, then to reactions to the product, and finally to the likelihood of purchasing the product again. When you ask people how easily the questionnaire reads, ask them about its flow as well.

5. The cost of wearing out your welcome is almost always high. You're asking people to give you one of their more precious possessions – their time. If they feel that you're asking for too much, they may either stop in midstream and walk away or begin to answer quickly and with little or no thought, which is an ugly compromise between feeling obligated to complete the questionnaire and not wanting to give it any more time and effort.

Accordingly, the time it takes to complete a questionnaire should always be reasonable. A key determinant is the respondents' level of involvement in the category. For example, you can probably get away with a longer questionnaire when you're interviewing people who ride motorcycles and asking questions about Harley-Davidsons than you can when you're asking people about toothpaste.

Another key determinant is how easy, or difficult, it is to get through the questionnaire. If there are no bumps in the road, no thorny patches, nothing to annoy or frustrate respondents, then a 15-minute questionnaire should be just fine. However, if there are questions that are less than clear, questions that involve rating and ranking an overly long list of attributes, repetitive questions and questions that don't make sense, then 15 minutes is going to seem like forever and respondents will react accordingly.

Once you have a questionnaire that fully addresses the objectives of the study, resist the temptation, and sometimes the pressure, to make it any longer until you pilot-test both versions. While it would be nice to get answers to additional questions that you and/or your client would like to ask, and while you may be inclined to feel that asking just a few more questions won't hurt, once respondents begin to feel that "this is taking up too much of my time," the quality of the information you collect will decline, sometimes precipitously. So if you can, take some people through the version of the questionnaire that doesn't include the additional questions, take some others through the version that does, and ask how they feel about its length.

6. Construct scales that respondents can easily understand and use. To help you do that, consider the following:

- Use descriptors that are a good fit with the subject matter. For example, if you want to ask respondents how they feel about a magazine, a scale that uses degrees of liking is a better fit than a scale that uses degrees of satisfaction. That

Figure 1

of no importance ( )	of little importance ( )	fairly important ( )	very important ( )	extremely important ( )
of no importance 1	2	3	4	extremely important 5
of no importance .	.	.	.	extremely important .

is, people are more likely to use "like" and "don't like" than "satisfied" and "dissatisfied" to describe how they feel about a magazine.

- Verbal descriptors, if they're sufficiently focused and clearly stated, are often – but not always – preferable to numeric or symbolic descriptors. For example, let's look at a five-point scale that's comprised entirely of verbal descriptors, a five-point numeric scale with two verbal descriptors anchoring the ends of the scale, and a five-point symbolic scale that's anchored by two verbal descriptors, as shown in Figure 1.

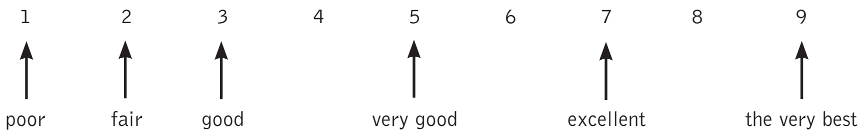
Scales consisting entirely of verbal descriptors – if sufficiently focused and clearly stated – are usually preferred because they leave no doubt about the meaning of each of the points on the scale. The same cannot be said about numeric and symbolic scales. Indeed, rather than assign meaning to each scale's interior points (2, 3 and 4 in the numeric scale), respondents tend to think about these points in terms of "more" and "less."

Still, verbal descriptors are not always the best choice. There are times when less direction is better than more, when you want respondents to decide where on a scale they belong without giving them a road map – in short, when you want to use a minimally-defined scale.

The number of points that you build into a scale should be the number of points you need to produce a reliable measure – and no more. If you have good reasons for believing that it takes three points, three points is all you want to use. If you're right, adding more points will only tend to lessen the reliability, and hence the validity, of the scale.

7. A scale does not have to be symmetric, nor does it have to have an equal number of favorable and unfavorable points. Typically, discrimination in the favorable part of the scale is far more useful than discrimination in the unfavorable part. For example, the difference between feeling that a product is "very good" and feeling that it's "good" can be the difference between keeping a cus-

Figure 2



tomer and losing him. In contrast, the difference between feeling that a product is "fair" and feeling that it's "poor" is largely immaterial. While these descriptors and the reasons respondents give for feeling this way can shed light on the product's shortcomings and, as a result, on some of the changes that should be made, neither "fair" nor "poor" can be taken as a vote of confidence. Moreover, we should provide an array of choices that permits each respondent who is interested in the product to find one that closely mirrors his/her feelings. Accordingly, enhanced discrimination in the favorable part of the scale is a goal worth pursuing. For example, the scale in Figure 2 includes nine numeric descriptors, six of which are paired with verbal descriptors. Together, they give respondents seven increasingly favorable choices, ranging from 3 ("good") to 9 ("the very best"). Using more numbers than there are verbal descriptors stretches the scale, giving respondents more options. That all nine numeric choices are not paired with verbal descriptors isn't a problem as long as there are enough verbal descriptors. And there are. The six verbal descriptors provide more than enough context to get a pretty good sense of the meaning of the three numeric choices that are unpaired.

8. Many respondents may choose a verbal descriptor based on its location in a scale rather than the meaning that the descriptor conveys. To illustrate, in separate readership studies of the same issue of a magazine, the scale used in the first study and the scale used in the second study generated the following distributions in response to a question about satisfaction with this issue of the magazine:

Scale one: the first study	
Very satisfied	53%
Somewhat satisfied	41%
Somewhat dissatisfied	4%
Very dissatisfied	1%

Scale two: the second study	
Extremely satisfied	18%
Very satisfied	58%
Somewhat satisfied	21%
Not too satisfied	2%
Not at all satisfied	1%

Given these distributions, what we really have is a two-point scale in the first study – "somewhat satisfied" and "very satisfied" – and a three-point scale in the second – "somewhat satisfied," "very satisfied" and "extremely satisfied." If the meaning of a descriptor, rather than its position in the scale, determines the choices respondents make, the percentage that said "very satisfied" in scale one would be about the same as the sum of the percentages that said "very satisfied" and "extremely satisfied" in scale two – since "very satisfied" in scale one encompasses both "very satisfied" and "extremely satisfied" in scale two. One look at the numbers – 53 percent in response to scale one and 76 percent in response to scale two – tells us that this wasn't what happened.

What appears to have happened is this: scale one effectively gave respondents two choices, scale two gave them three. Making use of the choices they were given, about 40 percent of the respondents in the second study "moved up" to a more favorable descriptor. Since the same specifications were used to select both samples and since sample size wasn't an issue, the cause lies elsewhere. Let's look at probable reasons why so many respondents moved up when given the chance:

- The addition of "extremely satisfied" to scale two enabled 18 percent of the sample to select a descriptor that came closer to their feelings than "very satisfied." So they chose it.
- "Somewhat satisfied" is part of scale one and scale two – exactly the same words are used in both scales. So why did the percentage of people who said they were somewhat satisfied fall from 41 percent in the first study to 21 percent in the second? My guess is that the 20 percent who moved from somewhat satisfied to very satisfied were what I'll call top box-averse: that is, they're cautious, careful about making up their minds and don't like to go out on a limb. Unfortunately, they felt that selecting the most favorable descriptor in the scale was going out on a limb. So they opted for the lower-profile choice – the second descriptor. In the first scale, that choice is "somewhat satisfied." In the second scale, it's "very satisfied." In all probability, these people were very satisfied with this issue of the magazine in both studies. However, the first study forced them to choose between the descriptor that best captured their feelings and the psychological comfort of the second position. They chose the latter.

Regardless of the validity this explanation, the findings indicate

Figure 3

20. Does the person that you care for participate in a support group, either online or in person?

Yes ( ) > SKIP TO Q.22
No ( )

21. Tell me why not. (CHECK ALL THAT APPLY)

He/she doesn't see a need to go	
He/she is highly functional/is at an early stage of the disease/symptoms are still mild	( )
He/she doesn't feel that he/she needs to attend a support group	( )
He/she feels that he/she gets enough support from his/her family	( )
Other ________________________________	( )
He/she doesn't want to go	
He/she is not interested/doesn't want to go/refuses to go	( )
He/she is not ready for a support group	( )
He/she is afraid/shy/embarrassed/uncomfortable	( )
He/she doesn't think it will help	( )
He/she went to a support group and didn't feel it helped/was uncomfortable/found it depressing	( )
He/she doesn't want to see others in worse shape/see how bad it's going to get	( )
He/she is a very private person/doesn't want to discuss personal problems with strangers	( )
He/she is in denial/doesn't want to admit that he/she has ______ disease	( )
He/she is withdrawn/has become socially reclusive	
Other ________________________________	( )
He/she is unable to go to a support group/to join an online group	
He/she isn't mobile enough/is too disabled to attend a support group	( )
There are no support groups/we're unaware of any support groups in the area	( )
He/she is in a nursing home	( )
Hard to get there/can't get there/no transportation	( )
He/she can't communicate well	( )
He/she is hearing impaired	( )
He/she is not computer literate/doesn't use/have a computer	( )
He/she doesn't have Internet access	( )
Other ________________________________	( )

that we're not going to get the most valid data we can unless our scales include choices that allow the full range of respondents' feelings to be expressed. At the same time, this analysis suggests that there are respondent idiosyncrasies that impose limits on the validity of the data, idiosyncrasies whose impact can be lessened but not eliminated.

9. Memory problems. Very few people can remember, with anything approaching accuracy, the number of times they engaged in a particular behavior in the last several months or more, unless it's something they do on a regular basis - like once a day or once a week. Unless it is, don't bother to ask. What you'll get is mostly guesswork.

10. If you're going to use ratings or rankings, use both. They give you largely different pieces of information, pieces that complement one another, pieces that are both instructive.

Ratings shed light on how important each attribute is to a respondent. However, they may tell you little, and sometimes nothing, about the relative importance of these attributes to a respondent: for example, the respondent who rates a number of the attributes of a given product as "very important." Are all these attributes equally important to the respondent? Are some more important than others? Is there one that's more important than the rest? If we don't get these attributes ranked, we don't know.

Rankings tell you about the relative importance of a list of attributes. What they don't tell you is how important each of these attributes is to a respondent. To a given respondent, they may all be important, or they may all be unimportant.

Ask respondents to rate each attribute. Next, ask them to rank the attributes that they rated as sufficiently important - for example, all the attributes that were rated as at least "fairly important." If an attribute isn't important to a respondent, there's no reason to have the respondent rank it.

11. Given a choice, try to keep your questions closed-ended. Though open-ended questions can provide very useful, insightful information, the data that they generate can be seriously flawed. For example, if interviewers are used, you don't know how often answers were recorded in their entirety, how often they were paraphrased and how often an interviewer jotted down just a small portion of an answer. If the questionnaire is self-administered, substantial variation in the ability and willingness of respondents to record their thoughts and feelings in any detail is almost always going to compromise the quality and usefulness of their responses.

However, there is a way to generate all the information that open-ended questions provide using a questionnaire that's comprised solely of closed-ended questions and, in doing so, to substantially improve the quality of this information by eliminating the effects of both interviewer and respondent variation. How? If you're running a big study - one that involves a large sample and that has a sizable number of open-ended questions that are must-haves - and you have the luxury of time, there is a way to make it a lot easier for respondents to work their way through the questionnaire, appreciably shorten the time it takes to complete the questionnaire, substantially increase the quality of the yield of the open-ended questions and eliminate a chunk of the time and expense of interviewing - if you're using interviewers - and coding. Here's how:

- Conduct a pilot test with at least 200 respondents. Use the responses to each open-ended question to build well thought-out and clearly-stated codes. That is, create groups of responses, such that the responses that comprise each group all have to do with the same issue and are headed by an umbrella statement that gives voice to this issue.
- Order the groups, and the responses within each group, based on the frequency with which they were mentioned.
- Finally, use these codes to convert each open-ended question to a closed-ended question by replacing the blank lines or empty text box with the groups of responses you've built.

What you'll have is a powerhouse questionnaire that yields incomparably rich data - data that will take you to new levels of understanding and insight. One key reason why: converting open-ended questions into closed-ended questions turns unaided recall into aided recall, which will almost always make a considerable difference when the converted questions are multi-layered and richly detailed. Why? Because they organize respondents' thoughts and feelings, which makes it easier to identify the responses that are connected to their lives. They also create awareness of the full range of responses, at least some of which respondents would have forgotten to mention had the question been open-ended.

To give you an idea of what a converted question looks like, I've borrowed one from a self-administered questionnaire (Figure 3). Respondents were caregivers to people - almost always family members - who had a progressive, often debilitating, disease. Although the question is now closed-ended, it still provides opportunities to record a response, should that be necessary.

Can be expanded

I have no doubt that this list of questionnaire construction guidelines can be expanded - there is always more to say. At the same time, what is here covers a lot of ground, and in a way that I hope you'll find useful. It's hard to deftly balance the research project's aims while respecting the respondent's time but it can be done. By applying the above considerations, you'll go a long way toward making the questionnaires you construct even more user-friendly, insightful and effective. | Q

Addressing a growing problem

Address-based sampling may provide alternatives for surveys that require contacts with representative samples of households

By Mansour Fahimi
and Dale Kulp

Increasingly, survey and market researchers are reconsidering address-based sampling (ABS) methodologies to reach the general public for data collection and related commercial applications. Essentially, there are three main factors for this change:

- evolving coverage problems associated with telephone-based sampling methods;
- eroding rates of response to telephone contacts along with the increasing costs of remedial measures to counter nonresponse; and on the other hand
- recent improvements in the databases of household addresses available to researchers.

In this article, we provide an assessment of these three factors, evaluate pros and cons of ABS as an alternative, and discuss specific enhancements that can establish this emerging methodology as a practical solution for market research applications. In particular, such enhancements include amelioration of some of the known coverage problems associated with ABS frames as well as their augmentations with demographic, geographic and other supplementary data items. While reducing bias due to undercoverage, such enhancements enable researchers to develop more efficient sample designs as well as broaden their analytical possibilities through an expanded set of covariates for hypothesis testing and statistical modeling tasks.

snapshot

This article examines factors contributing to researchers' increased interest in address-based sampling (ABS) and looks at the pros and cons of ABS. Against a backdrop of declining response rates, ABS appears to offer a convenient framework for effective design and implementation of surveys that employ multimode alternatives for data collection.

Fundamental changes

For the past decade and a half, a large portion of telephone surveys have been based on the random-digit dialing (RDD) methodology where telephone samples are generated within the 100-series telephone banks that contain at least one listed number. During the intervening years, this method of list-assisted RDD has overlooked the many fundamental changes in the U.S. telephony and relied on a convenient assumption that elimination of other telephone banks from the sampling frame amounts

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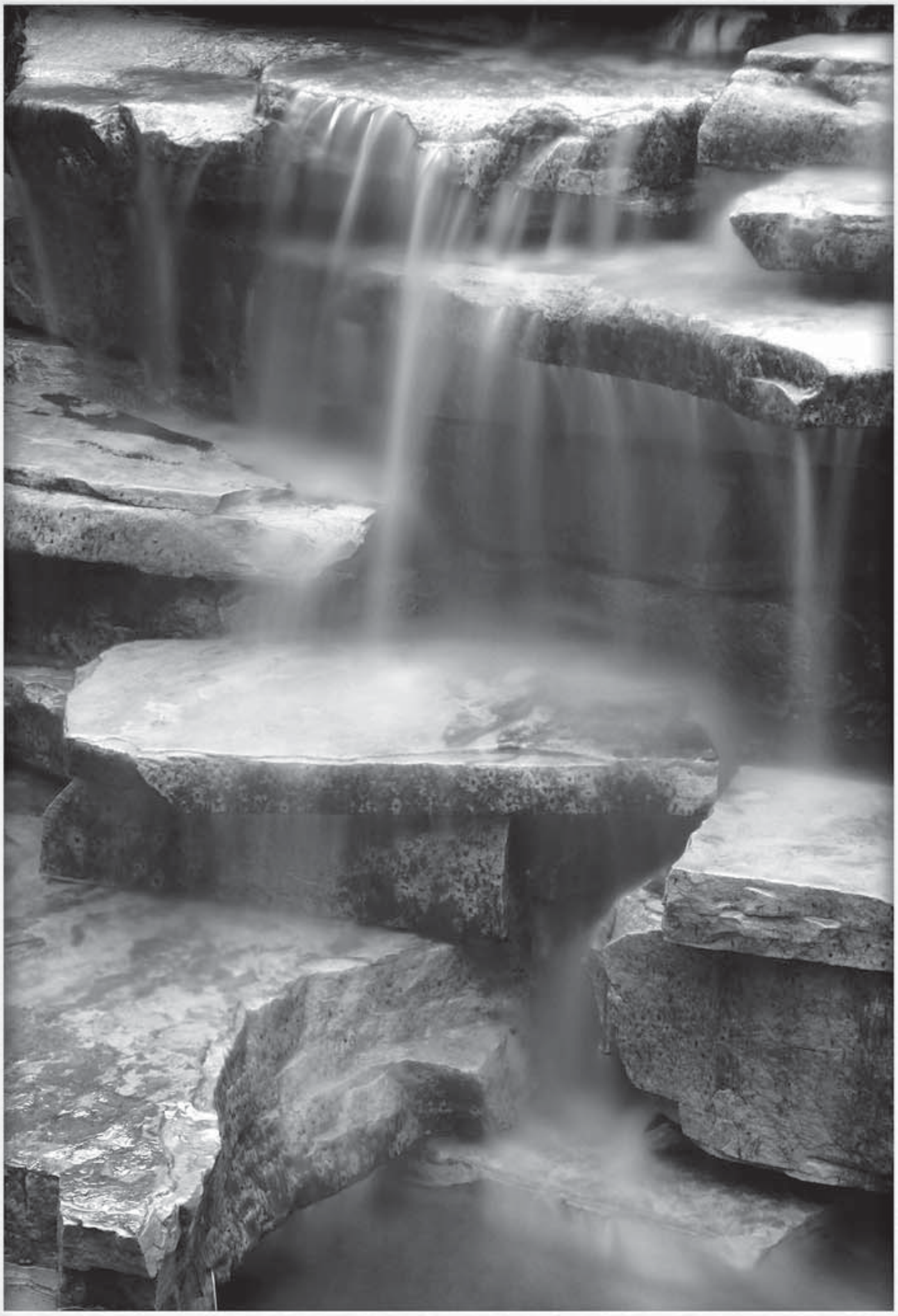


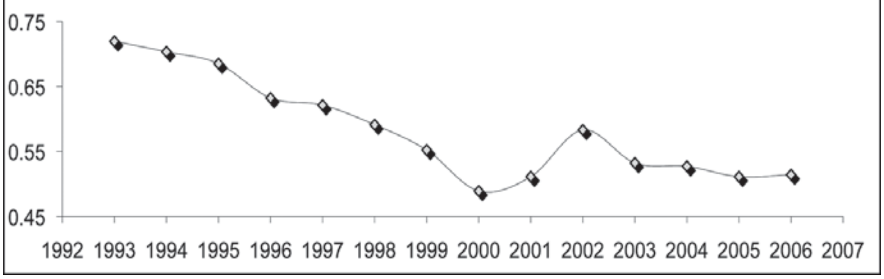
Table 1

Coverage Rates by 100-Series Bank Type (based study of 38,000 landline telephone numbers)				
Call Disposition Result	1+ Listed Banks	0-Listed Banks	Remainder Banks	Sample Size
Residential	80.50%	14.50%	5.00%	7,868
Business	35.70%	51.20%	13.10%	2,956
Cell	15.20%	49.90%	34.90%	291
Nonworking	23.90%	49.10%	27.00%	23,506
Pager/Fax/Modem	28.40%	36.50%	35.10%	1,620
Undetermined	30.50%	49.10%	20.40%	1,758

to exclusion of a small percentage of households, hence resulting in an ignorable coverage bias.

However, recent investigations suggest that the extent of this coverage bias is now approaching 20 percent and growing (Fahimi et al. 2008). More specifically, as seen in Table 1, about 15 percent of this undercoverage is attributed to residences whose telephone numbers are now in excluded telephone banks with no listed numbers while the remaining 5 percent are in POTS exchanges with mixed-use banks with no listed numbers. Moreover, with a growing number of cell-only and cell-mostly households, it is estimated that three out of every 10 adults receive all or nearly all of their calls on cell phones. Put together, the conventional RDD samples can fail to cover over 40 percent of the households - a problem that becomes even more pronounced when surveys target special subpopulations such as younger adults.

Figure 1: Response Rates for the BRFSS Survey, From 1993 to 2006



Biener et al. (2004) and Curtin et al. (2005) point out that the rate of response to telephone surveys has been on a decline. More recent investigations by Fahimi et al. (2007a) suggest that the national rates of response to the Behavioral Risk Factor Surveillance System (BRFSS) survey, which is the largest RDD survey in the world, follow this trend as well. As shown in Figure 1, BRFSS has suffered a drop of nearly 20 percentage points in response rates during the course of the past decade.

Given that nonresponse is highly differential in nature and varies significantly across different demographic subgroups, it is of a great concern when over half of the sample households opt not to respond to a survey. Even when sophisticated nonresponse adjustment procedures are employed to reduce the incurred bias, it would be farfetched to assume such remedial procedures can reduce nonresponse bias to a tolerable and measurable level. Also, it should be noted that reducing nonresponse bias via weighting is always exercised at the expense of the precision of survey estimates, since weight adjustments inflate variance estimates (Fahimi et al., 2007b).

Beyond statistical techniques, many researchers have resorted to other tactics to improve response rates to surveys. As reported by Fahimi et al. (2004) the offer of incentives can significantly increase response rates, however, even an increase of 10 to 20 percentage points can still leave a survey with an overall response rate below 50 percent. Moreover, marginal gains in response rate are often achieved at a high cost, as practical nonresponse conversion strategies are labor intensive and require exceedingly larger amounts of incentives to be effective. Coupled with the non-monetary cost due to loss of precision mentioned above, the overall cost of dealing with nonresponse can be prohibitive.

Promising alternative

Recent advances in database technologies along with improvements in coverage of household addresses have provided a promising alternative for surveys and other commercial applications that require contacts with representative samples of households. Obviously, each household has an address and virtually all households receive mail from the U.S. Postal Service (USPS). The delivery sequence file (DSF) of the USPS is a computerized database that contains all delivery point addresses, with the exception of general delivery where carrier route or P.O. box delivery is not available and mail is held at a main post office for claim by recipients. The second generation of this database (DSF2) is the most complete address database available. With more than 135 million addresses on file, it is safe to assume that if an address cannot be matched against DSF2 it is probably undeliverable. By providing validation services for both correctness and completeness of addresses, DSF2 can significantly enhance the address hygiene. Consequently, this system helps reduce the number of undeliverable-as-addressed mailings, increase the speed of delivery and reduce cost. Also, with daily feedback from tens of thousands of letter carriers, the database is updated on a nearly continuous basis.

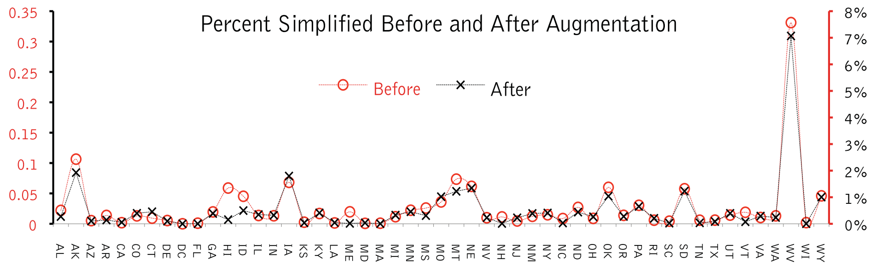
Given the evolving problems associated with telephone-based methods of sampling and data collection, many researchers are considering the use of DSF for sampling purposes. Moreover, the growing problem of nonresponse - which is not unique to any individual mode of survey administration or country (de Leeuw and de Heer 2002) - suggests that more innovative approaches will be necessary to improve survey participation. These are among the reasons why multimode methods for data collection are gaining increasing popularity among survey and market researchers. It is in this context that ABS designs provide a convenient framework for an effective administration of surveys that employ multimode alternatives for data collection.

Different strategies

Considering that through reverse-matching the telephone numbers for many addresses can be obtained, different strategies for a multimode survey administration can be developed to accommodate the timing, budgetary and response rate needs of a survey. One such strategy could start with the selection of a DSF-based probability sample of households in the geographic domain of interest. This sample may be selected across the entire domain, or clustered in an area probability fashion if in-person attempts are contemplated as part of the design. Initial contacts can be by phone and/or mail and can include attempts for survey administration at the same time. Alternatively, this first contact can serve as a recruitment effort to invite potential respondents to participate in the survey via Web, dial-in numbers for live interviewing, an IVR system or other options. Once the nexus of contact modes has been developed for each respondent, further contacts and reminders for survey completion can take place in any order or combination of modes that meets the project needs.

Cognizant of the potential implications of combining different modes of data collection, the emerging conclusions from many studies seem to suggest that different research modalities can often be combined effectively to boost response rates (Gary 2003). In comparison to an RDD-only approach, in particular, an address-based design using multiple modes for data collection can provide response rate improvements, cost savings, as well as better coverage for households that are completely uncovered by landlines (Link 2006). As for comparisons with in-person and mail-only modes of data collection, needless to say, the former is too costly to be practical for many applications while the latter (with notoriously low rates of response) requires expensive nonresponse follow-up efforts to produce creditable data (Groves 2005). What seems critical, however, is for researchers

Figure 2



to minimize differences between survey instruments associated with each mode. Moreover, effective weight adjustment techniques might be needed post-data collection to account for the observed differences in the profile of respondents to each mode.

Higher likelihood

As reported by a number of researchers, certain households have a higher likelihood of not being included as a delivery point on the DSF. Staab and Iannacchione (2003) estimate that approximately 97 percent of all U.S. households have locatable mailing addresses, however, this prevalence diminishes with population density and approaches zero in areas where home delivery of mail is unavailable. Dohrmann and Mohadjer (2006) report that when comparing lists of on-site-enumerated addresses to DSF generated listings of households for the same geography, in rural areas the rate of mismatches can be over 23 percent. However, these researchers do indicate that as rural area addresses go through the 9-1-1 address conversion and acquire a city-style format, the coverage of DSF-based lists in rural areas is likely to improve in the future. Also, O'Muircheartaigh et al. (2003) point out another source of undercoverage for address-based samples when lists of households are purchased directly from commercial list compilers because households can request that their addresses not be sold.

Beyond coverage issues, when DSF-generated samples are used in surveys that adopt a multimode approach for data collection one has to be prepared to address concerns about mode effects. While somewhat academic in nature, concerns have been raised about systematic differences that can be observed when collecting similar data using different modes (Dillman 1996). On the one hand, several studies have shown a greater likelihood for respondents to give socially-desirable responses to sensitive questions in interviewer-administered surveys than in self-administered surveys (Aquilino 1994). On the other hand, the rate of missing data is often significantly higher in self-administered (mail or Web) surveys as compared to interviewer-administered (telephone or in-person) surveys (Biemer et al., 2003).

While roots of differences in data quality and response rates between various modes of data collection deserve further investigations, some solace may result when surveys are administered without confining data collection to any single mode. Arguably, certain shortfalls of one method might be mitigated when other methods of data collection are made available to the respondents as well. Ultimately, however, it might be impossible to untangle the immeasurable interactions between the mode, the interviewer, the respondent and the survey content (Voogt and Saris 2005).

Comprehensive sampling frame

As mentioned above, the current version of DSF can serve as a comprehensive sampling frame for address-based survey applications when complete coverage and proper representation of the target population are among the non-negotiable features of the sample design. In addition to a near-perfect coverage of the entire country, this versatile database can provide scientific samples for finely-defined geographic subdomains – a resilient point of contention for telephone-based surveys, particularly in light of the growing coverage problem resulting from landline number portability. In addition to the available information that can be accessed directly from DSF2, it is possible to append many ancillary data items to each address for use in complex sample designs that require detailed information for stratification purposes. This is the crossroad where basic list suppliers, those that simply offer extracts from what the USPS provides, are differentiated from statistical sampling companies that provide enhanced versions of DSF. Key enhancements of DSF include: detailed geodemographic information; name and telephone number retrieval; and simplified address resolutions.

Detailed geodemographic information. While DSF can provide basic delivery details about an address, oftentimes researchers require detailed geodemographic data for sample design and allocation. By accessing several commercial databases that contain various data items for households, it is possible to enhance DSF for targeted sampling applications. While many of such data items correspond to individual households, there are also modeled characteristics that are available at different levels of aggregation. Starting from the ZIP+4 level, which typically consists of only a handful of households, the resulting information can then be rolled up to higher levels, including all Census geographic domains (block, block group, tract, county, MSA, state and region); marketing geographic domains (media markets, zip areas, etc.); as well as custom areas (retail trading areas and specific geographies based on distance or radius).

Name and telephone number retrieval. Customizing the initial mailings to sample households is

known to improve response rates and reduce cost. Given the plethora of junk-mail that households receive on a daily basis where the packets typically carry generic contact names, research suggests that the rate of response can increase significantly when the name of survey recipients appear on the mailed material (Dillman 1991). Moreover, with multimode survey applications one can reduce the number of nonrespondents to the mail survey through follow-up phone calls. Taking advantage of databases such as infoUSA, Acxiom and Experian, it is possible to retrieve names and telephone numbers associated with many of the DSF addresses. Done correctly, about 85 percent of addresses can be name-matched and over 60 percent can be linked to a landline telephone number - match rates decrease with inclusion of P.O. box addresses.

Simplified address resolutions. Since DSF only provides counts of undeliverable (simplified) addresses that are void of street numbers or other pertinent delivery information, resolution of such cases is among the most important enhancements that can be added when selecting address-based samples. While the number of such addresses is rapidly decreasing as they go through the 9-1-1 address conversion, currently there are about 1.5 million simplified addresses in the DSF. As seen in Figure 2, the distribution of simplified addresses varies across states, with West Virginia topping the rank with more than 30 percent of its addresses considered to be simplified. Again, by accessing several large databases that contain different information for households, one can obtain the missing information for virtually all simplified addresses. Subsequent to this resolution, all other informational data that exist for addressed households become available for sample design and data collection purposes.

Participation difficulties

All single-mode methods of data collection are subject to a growing range of coverage and participation difficulties on varying bases. Telephone-based surveys suffer from both coverage and response rate problems; in-person interviews are typically too costly to be practical as the only mode of data collection in many instances; and mail surveys alone often secure too low of a response rate to produce reliable results.

It is against this background that multimode methods of data collection are gaining popularity as alternatives that can reduce some of the problems associated with single-mode methods. As such, address-based samples provide a convenient framework for effective design and implementation of surveys that employ multimode alternatives for data collection. In this regard, the delivery sequence file of the USPS - once properly enhanced and prepared - provides a powerful tool for sample surveys. Enhancements provided by reputable organizations can improve the coverage of DSF and expand its utility for design and analytical applications. | Q

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research software

Still struggling with technology

A report on the 2008 Confirmit Market Research Software Survey

By Tim Macer
and Sheila Wilson

Now in its fifth year, the annual Confirmit Market Research Software Survey, as usual, throws up some surprises, confirms some hunches and reveals a few long-term trends in what the industry thinks about and does with the computer technology it uses.

The results of the 2008 study show us that market researchers are grappling with efficiency problems and are struggling to get the performance they need from some of the tools in place. Market research-specific autodialers have been on the market well over a decade, yet, as this study shows, the uptake of these cost-saving devices has been relatively modest. Conversely, there are innovative companies who are incorporating a range of Web 2.0 approaches into their surveys, and in some cases finding this quite hard to do with the current range of software. It is interesting that while some parts of the industry are embracing these edgy new technologies so swiftly, other parts are lagging behind.

Each year, in the past, the study has found a large number of companies wishing to change their software, and this year is no exception, with some companies even looking to make changes across the board. However, our survey was in the field in autumn 2008, at an early point in the understanding of the global economic downturn. We would expect the time line for such changes to be extended considerably now, and for some of the other estimates of growth to have been suppressed by economic events.

The study was conducted by meaning ltd during 2008 among a balanced sample of 215 research companies of all sizes across the globe. It was carried out as an online survey in four global languages. We are most grateful to Confirmit for sponsoring this research and also for allowing us to publish these results, and of course, to the 215 respondents who willingly shared their insights with us.

snapshot

Findings from the annual Confirmit Market Research Software Survey show that firms feel they aren't getting everything they need from existing software. As a result, they are developing their own programs and actively open to switching to those of other providers.

Online dominates

Figure 1 shows the volume of surveys being carried out by each research mode, expressed by each respondent as a proportion. Clearly, online research dominates, and has now risen to nearly half of all research modes by volume among the companies in our survey (though ESOMAR's 2008 Global Estimates, based on revenues, put this at 30 percent). From the buzz in the industry, it would be easy to assume

Editor's note: Tim Macer is managing director, and Sheila Wilson is an associate, at meaning ltd., the U.K.-based research software consultancy which carried out the study on which this article is based on behalf of Confirmit. They can be reached at tim@meaning.uk.com or at sheila@meaning.uk.com. To view this article online, enter article ID 20090509 at quirks.com.

that this growth has been at the expense of CATI. Our research shows that CATI is holding up well, and it is paper-based research which is showing a decline.

The onward march of Web research has been relentless throughout the lifetime of this annual study. When we first conducted it in 2004, we discovered that 81 percent of market research companies offered online research, and it has now reached near ubiquity, standing at 94 percent of research companies. Certainly, in just a decade, the industry's skepticism of the method has been replaced by near universal acceptance. Apart from Web and CATI, all the other data collection modes either seem to be in decline or have not yet taken off.

Still looking at penetration, rather than volume, there has been a 12 percent drop in the number of companies conducting paper-based research - down from 63 percent of firms in 2007 to around half (51 percent) in 2008. Laptop CAPI appears to be gradually declining too, with 32 percent of companies offering it in 2007 and 24 percent in 2008, although revenues have only dropped slightly in that time. With new and exciting modes such as mobile CAPI and mixed-mode maturing, we wonder if we are approaching the day when the paper-based survey in the professional research company becomes a niche service.

Figure 2 shows the responses when we asked researchers to predict changes they anticipated in the balance of interviewing work over the next three years using a four-point scale, where 2 represents major growth, 1 modest growth, 0 no change, and -1 a modest decline.

Given the findings shown in Figure 1, it is not surprising that the Web is predicted to be the main growth area, though we suspect this trajectory will begin to level out, given the high proportion it has already reached. Also a growth in mixed-mode CATI/Web and mCAPI seems inevitable as these technologies are maturing, making the task easier, and respondents are proving harder to reach by one channel and less so if more than one channel is combined. However, our respondents' expectations are modest for other modes, especially for mCAPI. It is noticeable that the North Americans and Europeans expect mixed-mode CATI/Web to grow, whereas those in Asia-Pacific anticipate virtually no change.

Figure 1: Research Modes by Volume - Three-Year Trend

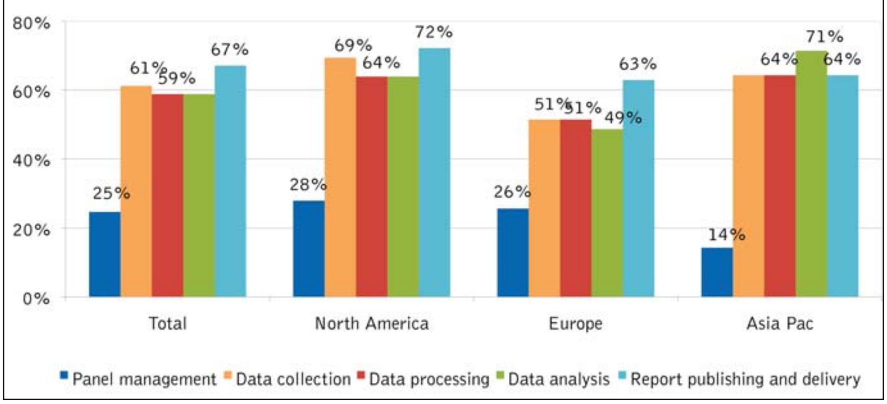
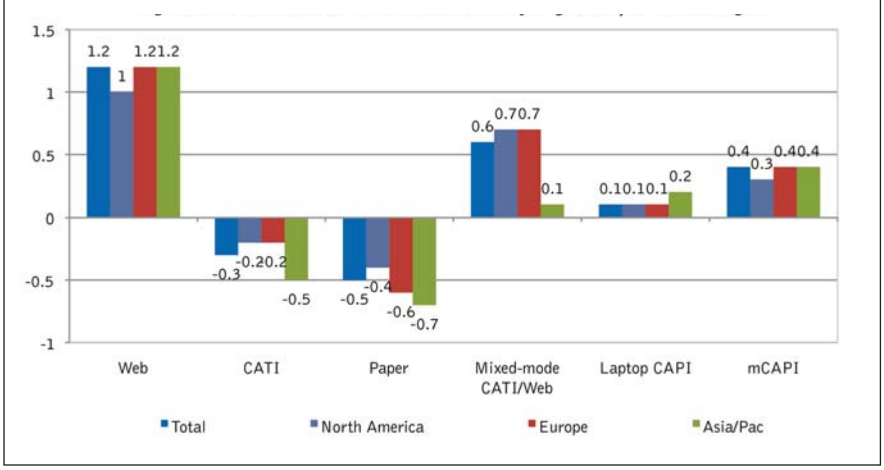


Figure 2: Predicted Shift in Work (2 = Major Growth, 0 = No Change)



The decline in paper seems inevitable, as it is cumbersome and inefficient compared with Web and mCAPI surveys. The expectation that CATI will decline slightly in all regions is at odds with our findings in Figure 1, where CATI has not declined; it appears to be more resilient than its practitioners anticipate. This sentiment may be linked to the observation that one in every four respondents said (in answer to another question in this study) that falling response rates is the principal challenge the industry faces.

The question illustrated in Figure 3 looks at telephone dialing methods and tells us the proportion of CATI work using each method both at the time of the study and as anticipated by respondents one year later.

Given the huge efficiency gains that can be made with autodialers, we are surprised that as much as two-fifths of all CATI work is still handled by manual dialing. While it is true that not every project is suited to autodialing - for example in B2B where the phone is almost always answered someone but not necessarily by the respondent - the technology appears to be underutilized.

Those firms who are not using autodialers are working at a major cost disadvantage to those who are, since autodialers give huge savings on staff - the main expense in a CATI operation. This gloomy prediction may be a rational response to the predicted demise of CATI in Figure 2, though is less rational if that decline fails to materialize.

Predictive dialing can offer even greater economy, its proponents claim. However, the industry is expecting only a gradual shift

Figure 3: Dialing Mode Prediction

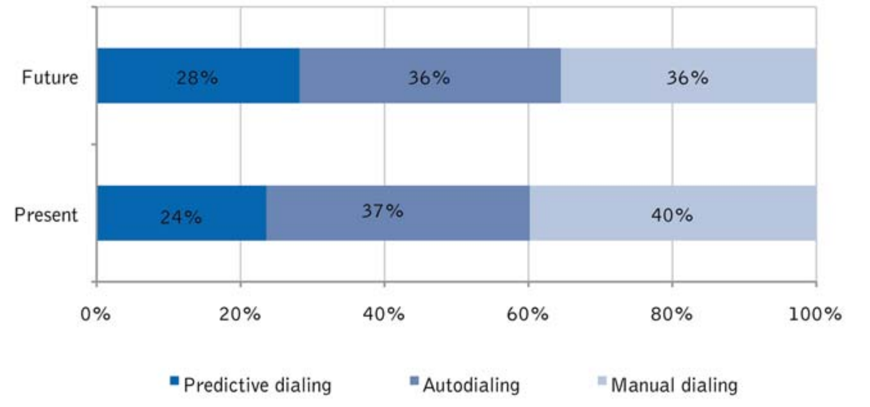
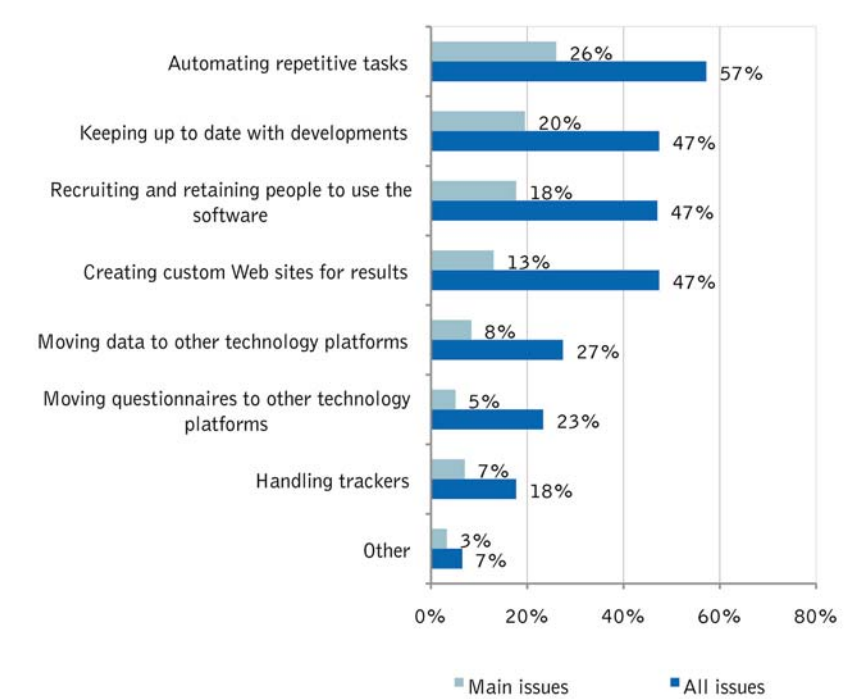


Figure 4: Technology Challenges You Are Facing



away from manual dialing towards predictive. We asked those who do not use predictive dialing why they don't. The top reason, for 42 percent of respondents, was the belief that they would realize no cost savings, due to the types of research they conduct. Nearly as many expressed ethical qualms, with concerns over nuisance calls. A further 22 percent felt that it would be too costly to install and operate. It seems that a proportion of the industry is unconvinced when it comes to autodialers, or perhaps unwilling to invest in something that is considered to be old hat.

What went wrong

Figure 4 summarizes responses to a new question for 2008, in which we asked the respondents about the technology challenges they were facing. "Automating repetitive tasks" came out on top. If we had received this answer in 1984, we would have found the insight impressive. A quarter of a century later, we are wondering what went wrong, as this is what computing at its most basic is supposed to achieve. It's a finding that does not speak well of the quality of the software that the industry is using and it may go some way to explaining some of the other findings we report later: many companies wish to change their software (Figure 6) and many market research companies are using bespoke tools (Figure 8).

Similarly, keeping up-to-date with technology developments and recruiting staff could be interpreted as reactive concerns, not ones where those responsible for technology are taking the lead.

Since the industry is preoccupied by problems at the more fundamental level, it is little wonder that some of the complex tasks further up the tree, like handling trackers or moving data or questionnaires to different platforms, are of a more secondary concern.

Figure 5: Use of Web 2.0 Technologies

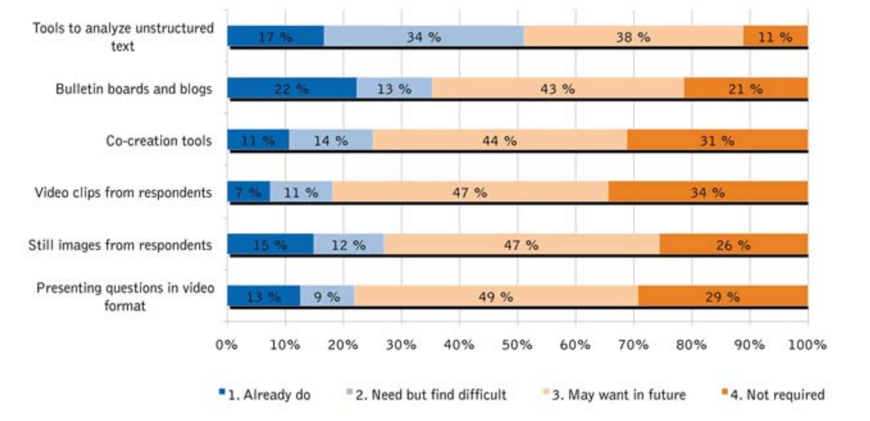
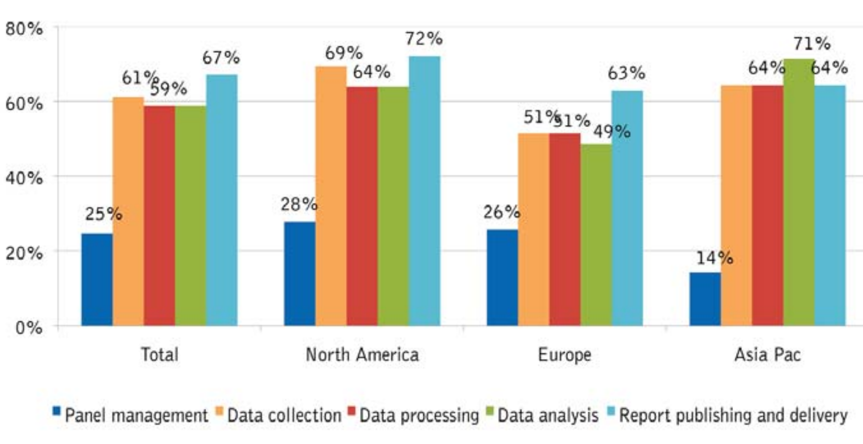


Figure 6: Types of Software Planning to Change



Innovators and traditionalists

For the first time, we asked respondents about their use of six emerging Web 2.0-style technologies in their research (Figure 5). The profession seems to divide between innovators and traditionalists. Although a significant minority of traditionalists felt these technologies were not required, there were also an impressive number of innovators who are already using blogging and co-creating in their studies or who are making their questionnaires more high-tech by presenting questions in video format, for example. There are not many market research-specific tools that incorporate Web 2.0, so those already employing these approaches have clearly used some effort and a great deal of imagination. Some items seem harder to do than others - analyzing unstructured text stands out in particular - but co-creation also has more users struggling to do it than actually doing it.

Given that Figure 4 revealed a profession perhaps running to catch up with computer technology, the latest gizmos may also not be a top priority for many practitioners.

Increased every year

Since we first asked respondents in 2006 whether they were planning to change their software over the coming two years, the number of those who said yes has increased every year - from 26 percent in 2006, to 34 percent in 2007 and 40 percent in 2008.

In the 2008 study, we asked those who said they planned to change their software which types of applications they wished to replace (Figure 6). The high proportion registered for each software type seems to indicate that some companies want to overhaul their software across the spectrum, rather than simply tinker at the edges. The Europeans appear to have slightly less radical ideas, as their noticeably shorter columns in Figure 6 attest. It's a difference we are unable to explain.

It is to be expected that far fewer companies wish to change their panel management software since many companies have not been using these tools for long enough to be thinking of changing them.

In a follow-up question, we asked the sample what were the main reasons for changing each type of software. The results were similar for each software type, with "seeking more functionality" coming out on top, followed by "achieve efficiency improvements" and "move to a more modern platform." There is, in any case, a large amount of legacy software in use throughout market research, and the observations here, combined with the earlier observations on unmet requirements for efficiency, can be viewed together as evidence of the difficulties many users are having with software that is long-in-the-tooth and not well integrated with other modern software tools.

Mixed-mode is important

As Figure 7 illustrates, we asked: "If you were choosing new software, or reviewing your current solution, how much importance would you place on the tool's ability to mix and combine different data collection modes?" Nearly all respondents think mixed-mode is important in new software. Given the ability of mixed-mode research to improve response rates - which respondents stated (in another question) was the main challenge the industry faces - it seems logical that the industry should wish to follow the path of mixed-mode. Thus it's a little surprising or even contradictory that in Figure 2 the expected growth of mixed-mode is so modest. However, many research companies appear to be unconvinced on the merits of multichannel research projects, and wish to adopt mixed-mode research platforms for the internal efficiencies they bring. In a separate question, we asked what level of functionality was required and only 21 percent said they needed the functionality to support mixed-mode projects where interviews can switch from


Sampling
That's Smart

Figure 7: Importance of New Tool's Mixed-Mode Abilities

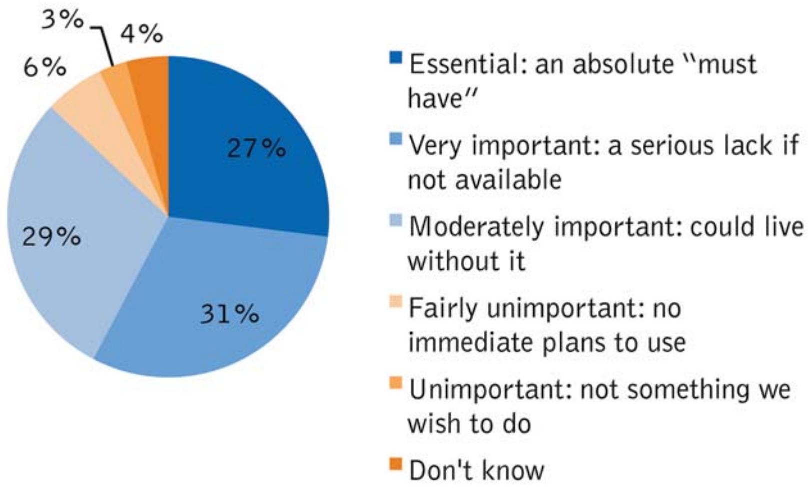
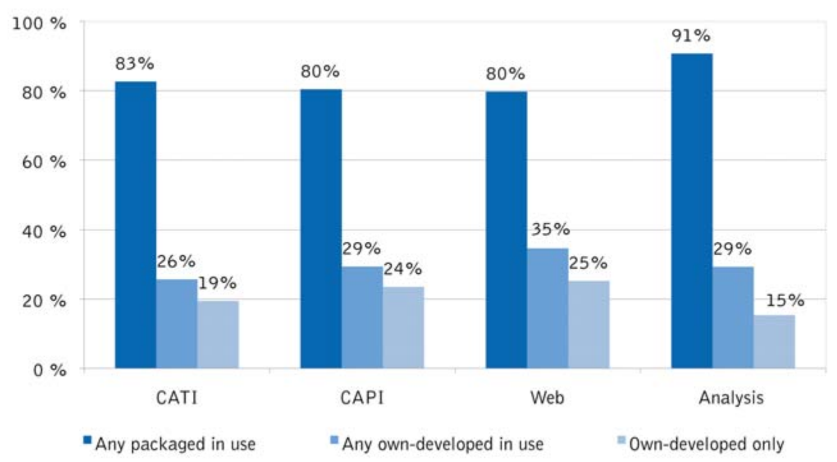


Figure 8: Packaged vs. Own-Developed Software in Use



one channel to another, 51 percent sought the ability to run mixed-mode samples in parallel and 22 percent were only seeking the benefits of one common platform for authoring and deployment.

Revenues are modest but not insignificant. In another question we found that 6 percent of revenues are now attributable to mixed-mode studies. Despite its apparent promise, it seems that market researchers are not anticipating any rapid gains in the area of mixed-mode research.

Never cease to amaze

Figure 8 shows the proportion of companies which use packaged versus bespoke software. We publish the latest results every year because they never cease to amaze us.

Given the costs and risks associated with developing custom software, and given the huge number of off-the-shelf applications on the market, one would think that tailor-made technology is a rarity, but far from it. In fact, in the case of Web and analysis, our measurements detect that the use of own-developed software is actually increasing. In 2007, 17 percent used own-developed Web software only, whereas in 2008 this has risen to 25 percent. Similarly, with analysis, the corresponding figures are 10 percent for 2007 and 15 percent for 2008.

In fact with Web (and indeed CAPI, though on a very small base) the use of packaged software has also increased, with 72 percent using packaged Web software in 2007 against 80 percent in 2008. As we saw in Figure 1, the number of companies offering Web research as a service is clearly growing but a proportion of the resulting spending on new technology is staying in-house and being put toward developing own-grown solutions.

The popularity of custom CATI software may go part of the way to explaining why so many companies are still not using autodialers. Integrating autodialer hardware and software with a CATI application is no simple matter for a software developer, so it seems unlikely that many bespoke CATI tools would support autodialers.

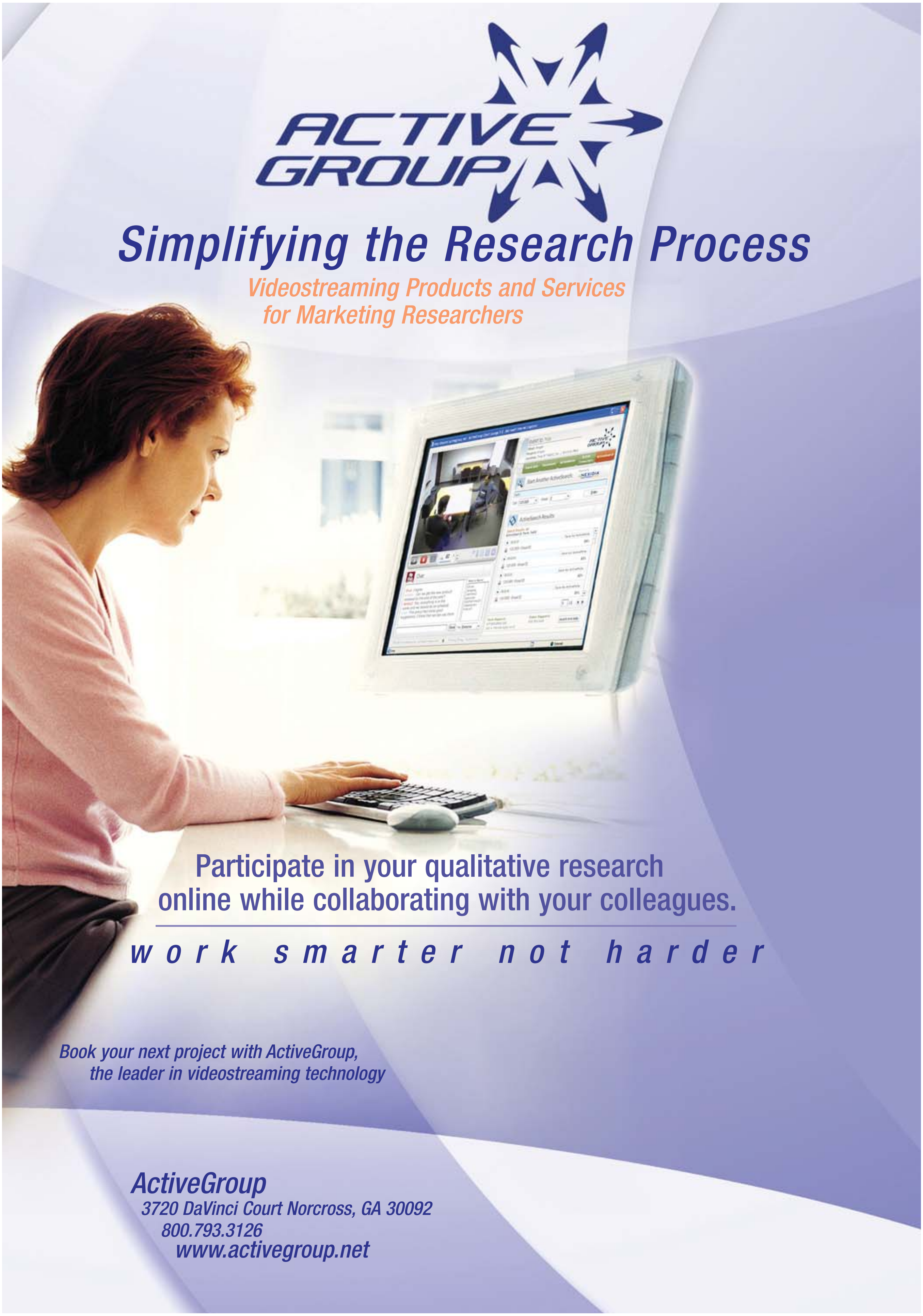
We also find it surprising that analysis is the software type that is least likely to be customized, since that is the part that produces the deliverable to the client - and one would think that that is where the market research firm has the most scope for differentiation and building added value.

Gathered pace

But what for 2009? Since fielding the study in early fall 2008, the economic downturn has gathered pace, alongside a greater understanding of its extent, and we would now expect companies to be much more pessimistic about the future. There are perhaps one or two early-warning signs already in the figures. For example, we noticed that in 2008, the big companies had become less certain about changing their technology than previously and the use of a wide range of sources of online sample, such as access panels, which had been steadily growing over the years, had levelled out in 2008.

As research businesses focus on survival in 2009, it seems unlikely that many will have the appetite or the budget for the major changes in technology predicted in the 2008 study, unless a bankable return on investment can be assured within the same fiscal year. But there is nothing like a recession for driving out inefficiency as well as cost, and, anecdotally, we have heard of several of the newer, more modern and lower-cost software suppliers actually having quite a good year so far.

We will be conducting the survey again is 2009 and expect it to reveal a very different landscape, probably a changed of priorities for research companies and no doubt some unexpected triumphs in adversity. | Q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continued from page 12

broadband at home. By contrast, El Paso, Texas; Dallas; Fresno, Calif.; and Harlingen, Texas, are the markets in which Hispanic residents are least likely to have a broadband connection. Phoenix is the leading local market for Hispanics who download digital content. El Paso, Miami and Dallas are the markets where Hispanic Internet users are least likely to download digital content. For more information visit www.scarborough.com/freestudies.php.

Don't underestimate American affinity for human contact

With continued development of technology, individuals around the globe are turning to new digital channels of communication. However, Americans are behind in the ever-growing trend of digital communication compared to their global counterparts, according Digital World, Digital Life, a study from Horsham Pa., research company TNS. Eight out of 10 Americans ranked face-to-face communication with family as the most important method of communication.

The survey also showed that even though Americans are adopting digital communication at a much slower rate than other global consumers, it is quickly becoming an accepted means of communicating. Americans ranked mobile phone (76 percent) and e-mail (72 percent) as their second and third methods of communication to family, which is quickly closing the gap on face-to-face communication (84 percent). When it comes to friends, 89 percent of Americans prefer face-to-face communication, although e-mail was a close second choice (82 percent), followed by mobile phone (73 percent).

In Canada, France, Finland and Italy, e-mail was used as much as face-to-face communication with friends. Other countries, such as South Korea, use mobile phones more than face-to-face communication with friends. In South Korea, 80 percent of respondents said that they communicate with friends by mobile phone, but only 61 percent said they communicate face-to-face.

"Face-to-face is still preferred in the U.S., but electronic forms of communication are rapidly becoming just as important," says Don Ryan, vice president, technology and media, TNS. "I don't think that the trend, as seen in South Korea, where mobile trumps personal face-to-face, will ever fully materialize here in the U.S., but there is certainly a trend in that direction. In the future we'll see an increase in human intimacy as technology evolves to accommodate our desire to connect with each other. Face-to-face and electronic forms of communication are both important, so the challenge for service providers will be to provide a mixed form of interaction using an electronic means of communication as a basis." For more information visit www.tnsglobal.com.

Customer satisfaction and stock prices coincide

Most retailers have seen falling stock prices, but those that improved customer satisfaction were punished less by investors. On average, retailers with improving American Customer Satisfaction Index (ACSI) scores lost about 30 percent of their market value in 2008, while those with declining ACSI scores lost nearly twice as much (57 percent). On the whole, Americans' satisfaction with the goods and services they buy improved in the fourth quarter of 2008, according to the ACSI, which is compiled by the National Quality Research Center at the Stephen M. Ross Business School at the University of Michigan, Ann Arbor. The index climbed to 75.7 on the ACSI's 100-point scale, up 0.9 percent from the previous quarter. Close to the end of the 2001 recession, an uptick in ACSI signaled that a rebound in the economy was near. But as the current recession has deepened, consumer behavior has changed much more than in earlier economic slowdowns. Consumer spending has continued to weaken while savings have gone up, suggesting that, at least for the short term, there will be less revenue for sellers and more pressure on profit margins and for cost reductions.

"For consumer spending to rebound, two conditions must be met: consumers must be favorably disposed to spend and have the means to spend," says Claes Fornell, head of the ACSI. "The good news from ACSI is that the first condition has been met: customer satisfaction is looking up. But it remains to be seen to what extent the government stimulus plan will help translate stronger satisfaction into increased consumer demand."

Customer satisfaction becomes even more important to individual companies, as they need to prevent customer defections and compete for shrinking dollars. Customer satisfaction with the retail sector gained 1.3 percent to 75.2. Lower gas prices pushed the ACSI score with service stations up by 5.7 percent to a score of 74, contributing to the overall improvement for retail, although department and discount stores (up 1.4 percent to 74) and specialty retailers also improved (up 1.3 percent to 76). Among department and discount stores, Nordstrom and Kohl's led with an ACSI score of 80, the former on the strength of its customer service, the latter for its superior value. Deep-discount store Dollar General dropped 4 percent to score of 75, not from a decline in service, but from a migration of a higher socioeconomic group of consumers to the retailer - another effect of the recession - a group that tends to be harder to please.

Wal-Mart had mixed results, falling 4 percent for its supermarket business to an ACSI score of 68, well below the industry average, but rising 3 percent for its non-grocery discount business to 70. Wal-Mart's Sam's Club also rose 3 percent to 79. In the specialty retail category Home Depot climbed 5 percent to an ACSI score of 70, matching its best result in four years. However, the improvement failed to lift Home Depot from the bottom of the industry, and the home improvement retailer still trails rival Lowe's (76) by a wide margin. Office Depot moved in the opposite direction, falling 4 percent to 75 amid store closings and layoffs. Supermarkets remained unchanged with an ACSI score of 76 even though food prices remain high. Publix is on top with a score of 82, the fifteenth straight year the supermarket chain has led the category. Safeway gained 4 percent to 75, its highest score since 2002.

The ACSI score for e-commerce fell 2 percent to 80. Online retail declined 1.2 percent to 82, driven mostly by drops for Amazon and eBay. But with a small dip, Amazon (down 2 percent to 86) remained the second-highest scoring firm of all companies in this release. The situation for eBay is different. Its ACSI score slumped 4 percent to 78, an all-time low. Revenues fell 7 percent in the fourth quarter, marking eBay's first-ever negative year-on-year quarter, and its stock price lost almost 60 percent in 2008. Newegg leads the online retail category with a score of 88. For more information visit www.theacsi.org.

Economy takes its toll on the thriving green market

The economy is starting to cast a shadow over green living's glow. After tripling the previous year, from 12 percent in 2007 to 36 percent in 2008, the number of Americans who say they almost always or regularly buy green products remains unchanged since last year, at 36 percent, according to survey data from Chicago research company Mintel.

"People's priorities have changed because of economic hardship. A substantial number of shoppers are struggling just to provide the basics for their families, so green living is no longer top-of-mind for many Americans," says Marcia Mogelonsky, senior research analyst at Mintel.

Cost remains an impediment to the green market's growth. The majority of adults are willing to pay only a little extra for green products. Moreover, over half of respondents (54 percent) say they would buy more green products but the products are too expensive.

In other consumer surveys, Mintel has uncovered similar hesitance toward buying green based on price. An October 2008 report on organics revealed that nearly four in five adults (78 percent) say they would buy more organic food if the products were less expensive. Likewise, a January 2009 report on environmentally-friendly cleaners showed that 52 percent of shoppers who buy household cleaning products feel green cleaning products are too expensive. For more information visit www.mintel.com.

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Response. For more information visit www.clarabridge.com.

Solution aims to gauge staff satisfaction

COA Solutions, a Surrey, U.K., business software company, has launched its employee engagement module, which is intended to help organizations develop and motivate staff. It is the latest addition to People Analytics, COA Solutions' business intelligence system for human resource professionals. The employee engagement module aims to enable organizations to improve staff performance and create a more effective workplace by measuring, cultivating and managing an employee's well-being against predefined key performance indicators. The information used by the engagement module to measure and managed levels of staff satisfaction is generated from the results of staff surveys.

The solution's reporting tool produces a range of reports including employee development, team engagement, new-starter satisfaction and leadership capability. For more information visit www.coasolutions.com.

MarketTools updates research platform

MarketTools Inc., a San Francisco research company, has enhanced and expanded the services available through its Web site. Panel Manager is a new offering and is designed to simplify managing a panel. Research Manager has been enhanced to include content management capabilities for uploading and managing all research project elements through a centralized research portal. Survey Manager (formerly zTelligence) has been updated to include a survey creation function to import a text-based survey (in Microsoft Word or plain-text format) via a one-step wizard. TrueSample Manager is the company's validation and quality-assurance sample technology. For more information visit www.markettools.com.

Briefly

PluggedIN, a Rochester, N.Y., research company, has opened its proprietary online community platform for use by researchers seeking to run their own online research communities. The PluggedIN Platform, which combines social networking and community features with market research capabilities, is designed for running extended qualitative research studies, including online communities, virtual ethnography and diary research. Market researchers can license one of three hosted editions of the platform, based on the needs of the project. For more information visit www.pluggedinco.com.

The Demographic Data Center, East Brunswick, N.J., has made the 2009 estimates and 2014 projections of the U.S. population available for purchase on DVD. The data provide demographic variables for the current U.S. population and for five-year projections of population trends. Variables include total population, population change, total households, race, age, gender, household income, owners vs. renters and more. The estimates and projections are also available on CD and online. For more information visit www.demographic-data.net/estimates/estimates_projections.htm.

San Francisco research company Peanut Labs has debuted I-frame, its second-generation platform used to deliver surveys to respondents within social networks. Recruitment, incentives and surveys are promoted in the voice of the network. For more information visit www.peanutlabs.com.

MRops, a Doylestown, Pa., research company, has launched MR-Communities in an effort to allow clients to build and manage online communities. The service uses a combination of Web 2.0 technology and community management tools. For more information visit www.mrops.com.

The NPD Group, a Port Washington, N.Y., research company, is now offering a consumer tracking service for the U.S. housewares market. The service is intended to offer information about who's buying cookware, bakeware, cutlery, dinnerware, beverageware and flatware, including where they are purchased, primary reasons for purchase, preferred purchase methods and more. For more information visit www.npd.com.

The 2008 Confirmit Market Research Software Survey, carried out by U.K.-based meaning ltd, on behalf of Oslo, Norway, research software company Confirmit, is now available. The survey highlights trends and expectations across the research industry. For a full copy of the survey or for more information visit www.confirmit.com. (See also the article on page 74 of this issue.)


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Research Industry News

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Kantar intends to close its Corpus Christi, Texas, call center, laying off 87 workers.

Additionally, The Kantar Group has reorganized and consolidated its existing business units into a new structure. TNS Custom Research Inc. and Research International have merged and will be known as TNS. The Research International name will be retained in some markets where the business will be known as TNS Research International. Kantar has also created four separate operating units: **Kantar Media** (comprising TNS Media Intelligence, TNS Media Research, KMR and TGI), **Kantar Healthcare** (comprising TNS Healthcare, Ziment Group, Consumer Health Services, imap, MattsonJack businesses), **Kantar Retail** (comprising Glendinning, Cannondale, Managmement Ventures Inc., Retail Forward and Red Dot) and **Kantar Worldpanel** (formerly Worldpanel).

Acquisitions/transactions

NeuroFocus, a Berkeley, Calif., research company, has agreed to purchase **Neuroco**, a Surrey, U.K., research company. Neuroco will become NeuroFocus Europe.

New York researcher **The Nielsen Company** has acquired **The Cambridge Group**, a Chicago consulting firm.

Additionally, **The GfK Group**, a Nuremberg, Germany, research company, has acquired Nielsen's C.L.E.A.R. service, which reports monthly sales-out information on contact lenses. C.L.E.A.R. will be integrated into GfK's StarTrack data and analysis system.

Ipsos, a Paris research company, has acquired **Punto de Vista**, a Santiago, Chile, research company. Ipsos acquired 100 percent of the share capital of the company from its shareholders. Carlos Arentsen, founder and main shareholder, will remain the chairman of Punto de Vista, which will incorporate the activities of Ipsos Loyalty in Chile.

Itracks, a Saskatoon, Saskatchewan, research company, has sold its call center to **Advanis**, an Edmonton, Alberta, research firm. In addition to the acquisition, Advanis and Itracks have formed a partnership, allowing Itracks access to over 250 call stations.

Alliances/strategic partnerships

Vovici, a Dulles, Va., research company, has partnered with London research company **Verve** to conduct Web surveys and create and manage panels.

Natural Marketing Institute (NMI), a Harleysville, Pa., research company, has entered into an agreement with New York researcher **The Nielsen Company** that allows Nielsen to incorporate NMI's Lifestyles of Health and Sustainability segmentation model into Nielsen BASES' consumer panel.

Association/organization news

John Kelly, chairman of Market Direction International, Surrey, U.K., has been elected an emeritus director of the **Marketing Research Institute International** (MRII), St. Louis. The MRII board of directors has also elected the following new directors: David Haynes, Western Wats, Orem, Utah; Michael Lautenschlager, The GfK Group, Nuremberg, Germany; and Wayne McCullough, Intelligent Data Mining and the University of Michigan, Ann Arbor, Mich.

The Advertising Research Foundation (ARF), New York, has launched the Shopper Insights Council, a group devoted to reshaping industry thinking about shopping as an integral part of the brand experience. The Council is co-chaired by Peter Hoyt, executive director, In-Store Marketing Institute; Robert Tomei, president, consumer and shopper insights, Information Resources Inc.; Michael Twitty, director, shopper insights, the Americas, Unilever; and Joel Rubinson, CRO, The ARF.

Awards/rankings

Richard Worick, president of **The MSR Group**, an Omaha, Neb., research company, has earned Professional Researcher Certification at the expert skill level. The certification is awarded by the **Marketing Research Association**, Glastonbury, Conn.

Chicago research software company **SPSS Inc.**'s data collection survey software Predictive Analytics has been ranked as having the highest customer satisfaction scores for online survey software providers, according to the Survey of Market Research Professionals. The study is conducted annually by **MarketResearchCareers**, a Stamford, Conn., market research online job database.

New accounts/projects

Paris research company **Ipsos** has been commissioned to conduct regular polls for **Thomson Reuters**, a New York news agency. Ipsos will carry out multinational polls on topics such as consumer attitudes, economic confidence, political issues and product ratings. Reuters will report on the research results.

Arbitron Inc., a Columbia, Md., research company, has signed multi-year agreements with **GAP Broadcasting LLC** and **GAP Broadcasting II LLC**, both headquartered in Dallas, for diary-based radio ratings services in 17 markets. The agreement includes software services for all stations in the 17 markets and Arbitrends monthly rolling-average reports in Shreveport, La.

Additionally, Arbitron has been selected to conduct a national survey for **CARE Media Networks**, Tampa, Fla., which provides place-based digital video education programs in doctors' offices. The survey will measure the effectiveness of CARE's programs in three networks: KidCARE TV (pediatricians' offices), Women's

HealthCARE TV (obstetricians' offices) and PetCARE TV (veterinarians' offices).

B2B International, a Manchester, U.K., research company, has selected Oslo, Norway, research company **Confirmit**'s Horizons platform to support its Web and telephone interviewing.

Chicago research company **Synovate** has chosen technology from Vancouver, B.C., research company **Vision Critical** for its online community panels. The agreement enables Synovate to access Vision Critical's interactive research software Sparq and simulated shopping Fusion platform. Vision Critical will provide software, hosting and technical support for Synovate Community Panels.

New companies/new divisions/relocations/expansions

Ci Research, Cheshire, England, has formed a new financial services team, led by Colin Auton.

Arbitron Inc., a Columbia, Md., research company, has moved its headquarters from New York to its existing facility at 9705 Patuxent Woods Drive, Columbia, Md. The New York location will remain open and continue to operate as a sales office.

Gallup, a Washington, D.C., research company, has opened a full-service office in Nairobi, Kenya. Bob Tortora, Gallup's research director for sub-Saharan Africa, will lead the office.

Adam Berman has launched a research technology and data processing firm, **CatalystMR**, located at 45 Yosemite Ave., Oakland, Calif. The business is online at www.catalystmr.com.

Research company earnings/ financial news

BrainJuicer PLC, London, increased its revenue by 42 percent last year to £9.3 million and increased its operating margin from 12.9 percent to 13.8 percent. BrainJuicer has opened two offices in Germany and Canada since the end of 2008.

B2B International, Manchester, U.K., reported in March that it had posted growth of $4.7 million between the years 2007 and 2008.

Peanut Labs, a San Francisco research company, announced 2008 revenue growth of 300 percent over 2007.

The GfK Group, Nuremberg, Germany, achieved organic growth of 5.5 percent to EUR 1,220 million in financial year 2008, and adjusted operating income rose to EUR 159 million. Dividends went up from EUR 0.45 to EUR 0.46 per share. Taking into account acquisitions and currency effects, sales increased by a total of 5 percent in 2008. All three GfK sectors (Retail and Technology, Custom Research and Media) increased organic sales growth in 2008 over the same prior-year period.

2009

Focus Group Moderator Directory

>>>

This directory was compiled by mailing, e-mailing and faxing listing forms to companies that we identified as having on-staff focus group moderators. Each firm was given a free basic listing including one on-staff moderator and also had the option to purchase a write-up, company logo insertion and industry and market cross-reference categories. We list 1,000+ moderators at over 900 firms.

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

Focus Group Moderator Directory Table of Contents

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(See advertisement on p. 75)

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info@ccgresearch.com
www.ccgresearch.com
Jon Canapary
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Cornerstone Research & Marketing, Inc.
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716-743-1988
rhonda@cornerstoneresearch.net
www.cornerstoneresearch.net
Rhonda Ried
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Corona Research
Denver, CO
303-894-8246
allison@coronaresearch.com
www.coronaresearch.com
Leo Lewis
100+ sessions since 2004

CPResearch Chicago (Br.)
Bloomingdale, IL
800-336-0159 or 630-894-9103
chicago@cpresearchgroup.com
www.cpresearchgroup.com
Richard Miller
500+ sessions since 1972

CPResearch Colorado Springs / Denver (Br.)
Colorado Springs, CO
719-596-6933 or 800-336-0159
coloradosprings@cpresearchgroup.com
www.cpresearchgroup.com
Richard Miller
500+ sessions since 1972

CPResearch Group, Inc.
Birmingham, MI
800-336-0159 or 248-540-5330
quotes@cpresearchgroup.com
www.cpresearchgroup.com
Richard Miller
500+ sessions since 1972

CPResearch Detroit (Br.)
Birmingham, MI
800-336-0159 or 248-540-5330
wats@cpresearchgroup.com
www.cpresearchgroup.com
Richard Miller
500+ sessions since 1972

CPResearch Los Angeles (Br.)
Redondo Beach, CA
800-336-0159 or 310-371-5578
losangeles@cpresearchgroup.com
www.cpresearchgroup.com
Richard Miller
500+ sessions since 1972

CPResearch New York (Br.)
Paramus, NJ
800-336-0159 or 201-909-0144
newyork@cpresearchgroup.com
www.cpresearchgroup.com
Richard Miller
500+ sessions since 1972

Craciun Research Group, Inc.
DBA CRG Research
Anchorage, AK
907-279-3982
jcraciun@crgresearch.com
www.crgresearch.com
Jean Cracium
5000+ sessions since 1980

Craciun Research Group, Inc. (Br.)
Seattle, WA
206-708-4500
jcraciun@crgresearch.com
www.crgresearch.com
Jean Craciun
5000+ sessions since 1980

Craciun Research Group, Inc. (Br.)
DBA CRG Research
Washington, DC
202-862-5566
jcraciun@crgresearch.com
www.crgresearch.com
Jean Craciun
5000+ sessions since 1980

CRC Research
Montreal, QC, Canada
800-932-7511
Lucie@crcresearch.com
www.crcresearch.com
Kathleen Deslauriers
2000+ sessions since 1990
Aline Gabriel
500+ sessions since 2000

CRC is the only facility in Montreal to have been Top-Rated in the 2006 and 2007 editions of the Impulse Survey of Focus Group Facilities, denoting the excellence of our service as rated by moderators. We are the exclusive provider of FocusVision and VideoMarker in Montreal. Our roster of qualitative research services also includes recruiting, written and simultaneous translation and moderating. Our highly-experienced French-speaking moderators handle individual interviews and focus groups with consumers, health care professionals and business people on a wide range of topics.

CRC Research
Vancouver, BC, Canada
604-714-5900 or 866-455-9311
Vancouver@crcresearch.com
www.crcresearch.com
Ed Gibson
1000+ sessions since 1994
Jessica Gibson
1000+ sessions since 1994

Father-daughter team Ed and Jessica Gibson are specialized pharmaceutical moderators who have conducted extensive research across Canada, U.S. and Europe. Covering a wide range of therapeutic areas, both have a reputation for relating to physicians by developing relationships, securing respect and demonstrating an intensive interest in the subject discussed.

Creative Consumer Research
Stafford, TX
281-240-9646
ppratt@ccrsurveys.com
www.ccrsurveys.com
Arthur Pratt
1000+ sessions since 1978
Joyce Walter
400+ sessions since 1986

With offices located in Houston and Phoenix, CCR offers complete field service covering Texas, Phoenix and the surrounding areas. Large conference-style focus group rooms with one-way mirrors and large client viewing rooms. Taste tests, telephone interviewing, executive surveys, mall intercepts, door-to-door interviewing, mystery shops, store audits and computer capabilities available. Bilingual interviewing, moderators and translators available. CCR also offers project management for multiple-city projects.
(See advertisement on p. 99)

Creative Focus, Inc.
Atlanta, GA
404-256-7000
vardis@mindspring.com
www.creativefocus.net
Harry Vardis
1000+ sessions since 1980

Creative Marketing Solutions, Inc.
Lahaska, PA
215-794-9277
creativemktsol@aol.com
Larry Schwarz
1000 sessions since 1986

Creative Research Services, Inc.
Norcross, GA
770-246-0298
ken.pia@creativeresearch.com
www.creativeresearch.com
Frank McGinn
1000+ sessions since 1993

Creative Research Services, Inc. (Br.)
Dallas, TX
214-340-3725
frank.mcginn@creativeresearch.com
www.creativeresearch.com
Frank McGinn
1000+ sessions since 1984

Creative Waves
Innovations in Qualitative Research
Pleasantville, NY
914-747-8086
creativewaves@att.net
www.creativewavesresearch.com
Mary Beth Keller
500+ sessions since 1987

Crescendo Consulting Group
Portland, ME
207-774-2345 x13
bethr@crescendocg.com
www.crescendocg.com

Crescent Research, Inc.
Dallas, TX
972-774-2100 or 877-209-1464
donw@crescentresearch.com
www.crescentresearch.com
Donald Winspear
250 sessions since 1993

Cross Financial Group
Lincoln, NE
402-441-3131
tom@crossfinancial.com
www.crossfinancial.com
Tom Hershberger
75 sessions since 1987

Cross-Tab Marketing Services (Br.)
Mumbai, India
91-22-28443031 or 91-22-40682822
sales@cross-tab.com
www.cross-tab.com
Ashok Iyer
50+ sessions since 2003

CSK Marketing Inc.
Racine, WI
262-681-7355
chris@cskmarketing.com
www.cskmarketing.com
Christine Shields Kann
Since 1997

Cue Brand Consulting
Chicago, IL
773-857-3355
www.GloriaQuigley.com
Gloria Quigley
100+ sessions since 1995

Cultural Horizons Inc.
Kansas City, MO
816-941-7000
culturalhorizons@aol.com
www.cultural-horizons.com
Nancy Huaco Lang
100+ sessions since 1994

Cunningham Research Associates
Fairview, TX
972-529-4965
markc@craresearch.com
www.craresearch.com
Mark Cunningham
1500 sessions since 1986

Customer Connections
Palm Harbor, FL
727-944-4401
craith@custconnections.net
www.custcon.net
Cheryl Raith
2000 sessions since 1980

Customer Insights Research, Inc.
Hendersonville, NC
828-692-3763
bob@customerinsightsresearch.com
www.customerinsightsresearch.com
Robert S. Rutter, Ph.D.
500 sessions since 1995

Customer Strategy Consulting
Beverly Hills, CA
310-659-8536
info@yourcustomer.com
www.yourcustomer.com
George Sloan
3000+ sessions since 1984

D.S. Fraley Associates
Chicago, IL
773-536-2670
dsfraley@dsfraley.com
www.dsfraley.com
Diane S. Fraley
600+ sessions since 1982

D/R/S HealthCare Consultants
Charlotte, NC
704-362-5211
drsimon@mindspring.com
www.drmsimon.com
Dr. Murray Simon
7500+ sessions since 1982

D/R/S HealthCare Consultants specializes in qualitative market research with health care professionals, patients and administrators. The company was established in 1982 by Dr. Murray Simon, a former health care provider who believes that research with health care professionals is more comprehensive and productive when personally conducted by someone who understands the complex patient/provider interaction through having experienced it.

Daniel & Kehr Consulting
Smyrna, GA
770-375-7808
danielkehr@gmail.com
Joe Daniel
50 sessions since 2001
Kathleen Kehr
115 sessions since 1997

Daniel Research Group
Belmont, MA
617-484-6225
FocusGroups@DanielRG.com
www.danielresearchgroup.com
Steve Daniel
1000 sessions since 1984

Helping you understand the future. We are a full-service market research firm designing and executing studies among users and buyers of information technology products and services worldwide. Focus groups studies employ our Focus/IT methodology based on 25 years of experience in designing and conducting technology focus groups in technical, commercial and consumer segments. Our model-enabled consulting services apply sophisticated quantitative forecasting methodologies to aid in making strategic and tactical business and marketing decisions.

Frances Darpino Consulting
Bonita Springs, FL
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fjdarpino@comcast.net
Frances Darpino
1000+ sessions since 1982

DataProbe Research
Winnipeg, MB, Canada
204-953-4444
lauren@dataprobe.ca
www.dataprobe.ca
Lauren Gervais
200 sessions since 1985

DataPrompt International
Chicago, IL
312-423-4100 or 800-468-0419
info@datapromptintl.com
www.datapromptintl.com/why_dpi.asp
Kathi Rose
325 sessions since 1992
Vecia Ricks
30 sessions since 1998

DataPrompt International has extensive experience conducting traditional and online qualitative research nationally and internationally. Our team of skilled moderators and network of multilingual interviewers are supported by state-of-the-art in-house resources, including: two focus group suites, in-depth interviewing rooms, dual-language taping and online focus groups. DataPrompt has directed studies for various industries, such as technology, health care, financial services, CPG, government and not-for-profit associations. We are a certified minority-owned/diversity firm.

Davidson-Peterson Associates
A Division of Digital Research, Inc.
Kennebunk, ME
207-985-1790
karen.peterson@digitalresearch.com
www.dpaonline.com
Karen Peterson
1000 sessions since 1974

Lin Davis & Associates
New York, NY
212-737-1388
lda1@ix.netcom.com
Linden Davis
150 sessions since 1994

M. Davis & Co., Inc.
Philadelphia, PA
215-790-8900 or 800-842-4836
louisa@mdavisco.com
www.mdavisco.com

Davis, Hibbitts & Midghall, Inc.
Portland, OR
503-220-0575
dhm@dhmresearch.com
www.dhmresearch.com
Adam Davis
500 sessions since 1982

Decision Analysis
Los Angeles, CA
310-979-0999
info@decisionanalysisinc.com
www.decisionanalysisinc.com
Richard Gabriel
535 sessions since 1988

Decision Analyst, Inc.
Arlington, TX
817-640-6166 or 800-262-5974
jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas
5000 sessions since 1969
Melanie Lobo
450 sessions since 1998
Roger Wallace
50+ sessions since 2001

From in-person focus groups and depth interviews to ethnography and laddering techniques, Decision Analyst delivers highly-analytical and decision-oriented insights. Decision Analyst offers both in-person and online qualitative research services. In-person services include: focus groups, sensitized groups, dyadic and triadic interviews and depth motivational studies. Decision Analyst is a world leader in online qualitative research: time-extended online focus groups, time-extended depth interviews, online ethnography and online pseudo-depth interviews.
(See advertisement on p. 101)

Decision Drivers
Briarcliff, NY
914-923-0266
decisiondrivers@aol.com
William Driver
3500 sessions since 1994

Decision Information Resources
Houston, TX
713-650-1425
info@dir-online.com
www.dir-online.com
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Decision Makers, Ltd.
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401-683-3100 or 561-364-3727
decisionmakersri@aol.com
Polly Harrington
2500+ sessions since 1986

DecisionTrack
Lititz, PA
717-625-3632
dectrack@ptd.net
www.decisiontrack.net
Dan F. Duda
100+ sessions since 1986

Delta Media Inc.
Ottawa, ON, Canada
613-233-9191 or 888-473-3582
info@deltamedia.ca
www.visionresearch.ca
Candace Fedoruk
100+ sessions since 1990

DeNance & Associates
Seattle, WA
206-417-1538
acdenance@msn.com
Andrew DeNance
1000+ sessions since 1995

Deuterman Marketing Research
Jamestown, NC
336-812-3500
corporateresearch@triad.rr.com
www.deutermanmarketingresearch.com
John Deuterman
300 sessions since 1984

Development II, inc.
Woodbury, CT
203-263-0580 or 888-227-3244
info@development2.com
www.development2.com
Steve Lewis
500+ sessions since 1980

Diagnostics Plus, Inc.
State College, PA
814-238-7936 or 814-234-2344
jfong@diagnosticsplus.com
www.diagnosticsplus.com
Jim Fong

Dialogue Resource, Inc.
Charlotte, NC
704-405-5611
nino.denicola@dialogueresource.com
www.dialogueresource.com
Nino DeNicola
10000 sessions since 1982

Ruth Diamond Market Research
a Cornerstone Research Company
Buffalo, NY
716-836-1110 or 716-836-1111
rhonda@ruthdiamond.com
www.ruthdiamond.com
Rhonda Ried
500+ sessions since 1982

The Dieringer Research Group, Inc.
Brookfield, WI
262-432-5200 or 888-432-5220
sales@thedrg.com
www.thedrg.com/quirks
Barbara Carpenter
Since 2004

Digital Research, Inc.
Kennebunk, ME
207-985-7660
jane.mount@digitalresearch.com
www.digitalresearch.com
Karen Peterson
1000 sessions since 1974

Direct Dialogue
Fressingfield Eye, Suffolk, United Kingdom
44-137-958-6850
david@directdialogue.net
www.directdialogue.net
David Spenser
3000+ sessions since 1980

Direct Feedback, Inc.
Pittsburgh, PA
412-394-3676 or 800-519-2739
kevin.edwards@dfresearch.com
www.dfresearch.com
Tara Conroy
824 sessions since 1990

Directions Research Corp.
Mason City, IA
641-423-0275
thultc@willowtree.com
Tom Thul
1500 sessions since 1980

Discovery Works, Inc.
Cincinnati, OH
513-489-1887
jhriester@discoveryworks.net
www.discoveryworks.net
John Riester
1500+ sessions since 1991

Distinctive Marketing, Inc.
Montclair, NJ
973-746-9114
info@distinctivemktg.com
www.distinctivemktg.com
Diane Spencer
100+ sessions since 1990

DLG Research & Marketing Solutions
Houston, TX
713-795-5503 or 713-623-0820
info@dlgresearch.com
www.dlgresearch.com
Edgardo de la Garza
350+ sessions since 1997
Elvia de la Garza-Morales
350+ sessions since 2000

Bilingual and bicultural moderators whose professional backgrounds encompass experience from all sides of the business: agency, client and supplier. This grants a richer understanding of the client's position - strengthening the approach to each project, identifying and tending opportunities and intuiting and delivering against clients' stated and unstated needs.

DMCotter Research & Strategy, Inc.
Dedham, MA
781-956-8171
questions@dmcotter.com
www.dmcotter.com
Dan Cotter
300+ sessions since 1978

For 30 years, Dan Cotter has conducted focus group research for media companies throughout North America. He also owns Suburban Focus Group, his state-of-the-art facility in Boston, where he moderates groups for companies in a range of industries. He's widely recognized as one of the very best in the business.

dmr kynetec
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314-878-7667
vicki.thies@dmrkynetec.com
www.dmrkynetec.com
Louis Chavez
40 sessions since 2002

DMRA
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650-856-9988
mikeg@dmrainc.com
www.dmrainc.com
Michael Green
1000+ sessions since 1982

DMS Research
Los Angeles, CA
310-659-8732
jdraper@dmsresearch.com
www.dmsresearch.com
John Draper
300+ sessions since 2000

DO Research
New York, NY
212-734-4544
dokrent@aol.com
Diane Okrent
1500+ sessions since 1976

Dodge Business Research Consulting
Minneapolis, MN
800-685-7934
tony@dodgeresearch.com
www.dodgeresearch.com
Tony Dodge
1000+ sessions since 1983

Dolobowsky Qualitative Services, Inc.
Waltham, MA
781-647-0872
reva@doloqual.com
www.doloqual.com
Reva Dolobowsky
2000+ sessions since 1975

Dominion Focus Group, Inc.
Dominion Marketing Research, Inc.
Richmond, VA
804-672-0500 or 804-672-1417
bana@dominionfocusgroup.com
www.dominionfocusgroup.com
Bana Bhagchandani
80 sessions since 1998

Jack R. Doub Co.
Dayton, OH
937-238-5390
jrowlanddoub@gmail.com
Jack Doub
50 sessions since 1974

Douglass Results
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415-377-3664
lisa@douglassresults.com
www.douglassresults.com
Lisa Douglass Pearlmutter
600+ sessions since 1997

Melanie Dowe Marketing Group, LLC
Point Roberts, WA
360-945-3693
mdowe@dowemarketing.com
www.dowemarketing.com
Melanie Dowe
1000 sessions since 1987

Doyle Research Associates, Inc.
Chicago, IL
312-863-7600
info@doyleresearch.com
www.doyleresearch.com
Susan Sweet
500+ sessions since 1995
Jo-Ann Goodchild
750+ sessions since 1989
Carole Schmidt
750+ sessions since 1990
Christine Efken
750+ sessions since 1990
Nan Burgess-Whitman
500+ sessions since 1997

Doyle Research Associates is an innovative qualitative research firm specializing in focus groups, in-depth interviews, observational research and online research with both the general population and Hispanic markets. We also provide ideation services among consumers (kids, teens and adults), professionals and internal teams. Category experience includes food and beverage, food service, personal and home care, pharmaceutical, telecommunications, toys and games, publishing, nonprofit/social issues, media and entertainment and durable goods.

DRW Research
Southfield, MI
248-350-0056
darlenerw@sbcglobal.net
Dr. Darlene Williamson
1000+ sessions since 1987

Dr. Darlene Williamson is a psychologist with over 18 years of experience conducting research with consumers of different demographic profiles, business owners, executives, managers and employees. Dr. Darlene Williamson has personally directed and implemented qualitative and quantitative studies with multicultural segments across industries. Topics: corporate and brand image, ad concept testing, product development, taste tests, car clinics, sponsorship evaluation, ethnographies.

Bonnie W. Eisenfeld
Philadelphia, PA
215-567-1635
bwehrl@yahoo.com
www.independentmarketingresearchers.com
Bonnie Eisenfeld
Since 1980

The Elliott Group Ltd,
Sarasota, FL
941-822-0739
info@theelliottgroup.com
www.theelliottgroup.com
Brandon Elliott
1000+ sessions since 1984

Ellison Research
Phoenix, AZ
602-493-3500 x8130
ronsellers@ellisonresearch.com
www.ellisonresearch.com
Ron Sellers
1000 sessions since 1988

Abby Ellison Research
Div. Of EQR, Inc.
New York, NY
212-452-2938 or 917-576-2458
EQR2@aol.com
Abby Ellison Kanarek
3800 sessions since 1969

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206-652-2454
andrew@emcresearch.com
www.emcresearch.com
Andrew Thibault
200 sessions since 1993

Emerse Research and Development
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616-241-2056
rvanderlaan@emerse-rd.com
www.emerse-rd.com
Dr. Sheri Forzley
200+ sessions since 1992

ENERGISTICS
Chapel Hill, NC
919-933-0614
susannassar@energistics.com
www.energistics.com
Susan Nassar
3000 sessions since 1987

Energy Annex
Chicago, IL
312-733-2639
jessica@energyannex.com
www.energyannex.com
Kay Allison
1200 sessions since 1999

Envision Marketing Research
Val-David, QC, Canada
819-322-7028
envisionmr@sympatico.ca
Elizabeth Héon
1000+ sessions since 1979

Elizabeth Héon, a Certified Marketing Research Professional, has been conducting focus groups, triads, depth and ethnographic interviews, using the full spectrum of projective techniques, for 20+ years in French and English, across most product/service categories, partnering with advertising and market research agencies, planners and management consultants in the U.S., Great Britain and Europe.

Envision Research, Inc.
Atlanta, GA
404-587-1001
bill@envision-research.com
www.envision-research.com
Bill Douglas

Experience: 13+ years in a wide variety of qualitative and quantitative research projects with Coca-Cola, Nestea, McDonald's, Kellogg's, Reynolds Wrap and other global brands. Education: MBA University of Virginia (Darden); RIVA Training Institute Fundamentals of Moderating. Associations: AMA, MRA, QRCA, MRII. Experienced presenter, instructor and moderator.

Epp Consulting
Calgary, AB, Canada
403-201-2583
lhepp@shaw.ca
Lois Epp 1989

EquiBrand Consulting
Moraga, CA
925-247-1400
tim@equibranding.com
www.equibrandconsulting.com
Tim Koelzer
100+ sessions since 1990

Essential Resources, LLC
Morristown, NJ
888-326-7250
tim.friel@essential-resources.com
www.ersurveycenter.com
Lucy Mundo
100 sessions since 1996

Essman/Research
Des Moines, IA
515-282-7145
mail@essmanresearch.com
www.essmanresearch.com
Denise Essman
350+ sessions since 1981

eStyle Marketing Services, Inc.
eStyle Studios
Calgary, AB, Canada
403-685-2239 ext.1
estyle@estyle-group.com
www.estyle-group.com
Almin Kassamali
150 sessions since 2004

Eureka Facts, LLC
Rockville, MD
866-693-2287 or 301-610-0590
restrepoj@eurekafacts.com
www.eurekafacts.com
Jorge Restrepo
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Laura Burns

Experienced moderators. On-site recruitment and focus group facilities. Expertise in cognitive interviewing, focus group moderation in English and Spanish. Teens, Gen X / Gen Y, executives. Strengths in research for nonprofits initiatives, membership, content delivery, government program evaluation, multicultural audiences, impact assessments.

Evolve Research
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kevin@evolve-research.com
www.evolve-research.com
Kevin Mark Jessop
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Executive Marketing Information (EMI)
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bsmith@emiresearch.com
Dr. Burt Smith
Since 1989

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www.explorations-qrc.com
Sue Gartzman
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info@eyetracking.com
www.eyetracking.com
Sylvia Knust
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FacFind, Inc.
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FacFind@aol.com
www.facfindresearch.com
Sandra Barritt
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Facts 'n Figures
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818-986-6600
steve_escoe@factsnfiguresinc.com
www.factsnfiguresinc.com
Bonnie Ponaman
500+ sessions since 1998
(See advertisement on p. 33)

Fader & Associates
New York, NY
212-749-3986
jenniferlarsen@faderfocus.com
www.faderfocus.com
Susan Fader
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Falk Research Associates, Inc.
Maitland, FL
407-647-3333
thor@falkresearch.com
www.falkresearch.com
Thor Falk
1000+ sessions since 1989

Fearless Branding
San Francisco, CA
415-292-5100
robert@fearlessbranding.com
www.fearlessbranding.com
Robert Friedman
25 sessions since 2004

Feldman Research Lab
Teaneck, NJ
201-833-9607
rich@researchlab.tv
www.researchlab.tv
Richard Feldman
250 sessions since 1985

Field Dynamics Marketing Research
Encino, CA
818-783-2502 or 800-434-3537
field@fielddynamics.com
www.fielddynamics.com
Tony Blass
500 sessions since 1995

Fieldwork Ethnography
Los Angeles, CA
949-322-5044
connect@fieldwork.tv
www.fieldwork.tv
Joanna Morehead
200+ sessions since 2002

Fine Research S.R.L.
Consolacao, Sao Paulo, Brazil
54-11-3256-1626
field-la@fine-research.com
www.fine-research.com
Cozette Gelli
100 sessions since 1999

Fine Research S.R.L.
Ciudad De Buenos Aires, Argentina
54-11-4896-4180
field-la@fine-research.com
www.fine-research.com
Marisa Greco
100+ sessions since 1994

Fine Research The LatAm Field Company
Churubusco, Mexico
52-55-5659-5645 or 521-55-1730-9341
field-la@fine-research.com
www.fine-research.com
Graciela Braniff
1000+ sessions since 1976

FIRST INSIGHTS
Usability Consulting
& Internet Marketing

First Insights
New York, NY
212-926-3700
info@firstinsights.com
www.firstinsights.com
Lon Taylor
500+ sessions since 1999
Julie Rabin
300+ sessions since 2000

First Insights specializes in usability testing, ethnographic studies, contextual interviews, focus groups and heuristic analysis. We've conducted research projects in a variety of industries and can offer complete project management to include: facility selection, screener development, creation of a moderator's guide and moderation in one-on-one, group, phone or online settings. Our team pays careful attention to understanding your business, marketing or IT objectives and we always deliver an easy-to-understand summary report.

First Research
Greensboro, NC
336-691-8100(east coast) or 989-941-0147(mid west)
gwfirstrsh@aol.com
www.firstrsh.com
Gratia Wright
2500+ sessions since 1987

Fischer Research Assoc. Inc.
Doylestown, PA
215-794-2665
klfischer@comcast.net
www.FischerResearch.com
Karen I. Fischer, Ph.D.
2000 sessions since 1982

Linda Fitzpatrick Research Svcs. Corp.
West Nyack, NY
845-353-4470
linda.fitzpatrick@disabilityetiquettetraining.com
www.disabilityetiquettetraining.com
Linda Fitzpatrick
1000+ sessions since 1973

Anne Flanz Custom Marketing Research
Glen Ellyn, IL
630-469-1092
aflanz-cmr@sprynet.com
Anne Flanz
10000+ sessions since 1978

Andrew Fletcher Consulting Ltd.
Wellington, New Zealand
64-4-479-3783
andrew@fletcher.co.nz
www.fletcher.co.nz
Andrew Fletcher
600 sessions since 1994

Flynn Consulting
St. Louis, MO
314-822-4634
flynnconsult@att.net
Mike Flynn
2500 sessions since 1980

Focal Research Consultants Ltd.
Halifax, NS, Canada
902-454-8856
focal@focalresearch.com
www.focalresearch.com
Tracy Schrans
100+ sessions since 1990

Focus Inn™
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973-728-0643
info@focusinn.com
www.focusinn.com
Adele Schwartz
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gcafocuslatino@austin.rr.com
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1583 sessions since 1996
Beatriz Noriega
1919 sessions since 1978
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Consumers

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State College

Rhode Island

Newport

Providence

South Carolina

Charleston

Greenville/Spartanburg

Tennessee

Knoxville

Memphis

Nashville

Texas

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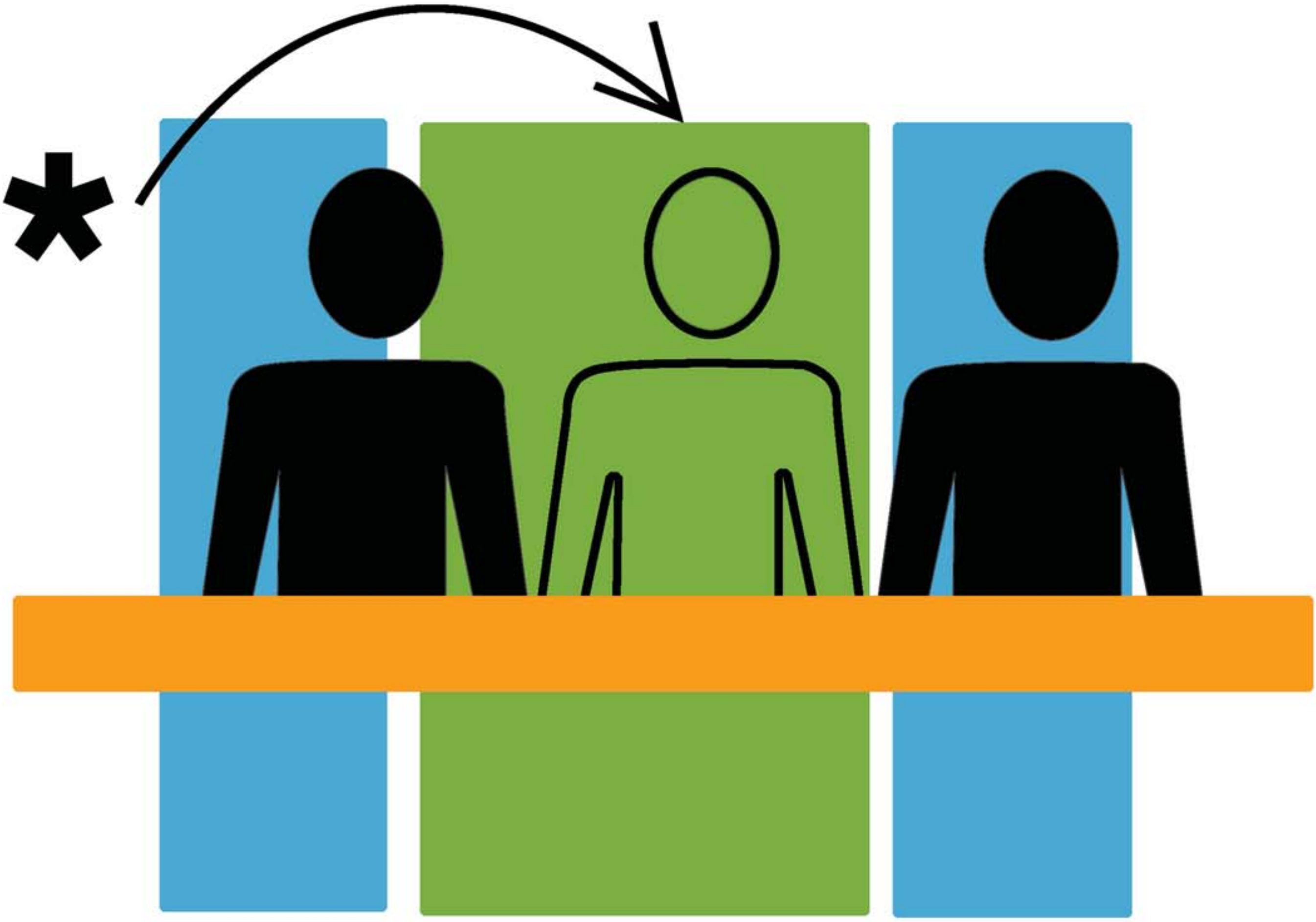

Geographic Index

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trade talk

By Joseph Rydholm
Quirk's editor

Will creativity save marketing research?

At press time in early April, while the economy is still struggling mightily, there are a few hopeful signs of life. The news remains mostly bad but the general feeling seems to be that we're near the bottom and ready to start crawling back up.

In our own industry, the qualitative side appears to have been hit the hardest, based on anecdotal evidence from facility owners, who reported a dearth of bookings in January and February. On the quant side, our Research Industry News section this month has several entries on firms shuttering call centers and cutting staff.

While the hard times are certainly nowhere near over, I am hopeful that better days are ahead. My guarded optimism was boosted after listening to a recent Peanut Labs Webinar on the state of the industry. Titled "2009 Market Research Update," the presentation painted a realistic view of our current situation - no cause for joy there. But toward the end of his talk, host Simon Chadwick sketched out a view of Research 3.0, as he termed it, that left me energized.

The Webinar reported results of an online survey undertaken by research firms Peanut Labs, MRops and Cambiar which drew responses from 185 research companies, 39 data collection companies and 67 client-side researchers. Industry veteran Chadwick, who is CEO of Peanut Labs and managing partner of Cambiar (along with being editor-in-chief of ESOMAR's *Research World* magazine – when does the man find time to sleep?), also offered his own observations based on talks with clients and others in the industry. (To access the Webinar materials, click on the [downloads] tab at www.peanutlabs.com and scroll down to the Webinars section.)

Relationship-building

One overarching theme was that of relationship-building, between marketers and consumers and also between marketers and their research vendors.

As clients are looking to establish more intimate relationships with their customers, they are turning to Web communities and other online-based efforts, Chadwick said. He mentioned McKinsey studies of firms in North America and Europe that suggest high-performing companies are more likely to use approaches such as ethnography; social networks and other Web-based communities and panels; trend experts; buzz networks; blog mining and neurolinguistics.

In these tougher times, Chadwick reported that some client-side researchers are looking to maintain and even strengthen bonds they have with preferred research suppliers, feeling that they have greater negotiating leverage with them. This may lead to deeper relationships between clients and research companies and may result in an ongoing, continual supplying of insights rather than one-off projects, Chadwick said. As evidence of that, the Peanut Labs study found that over 45 percent of research companies intend, in the next 12 months, to invest in building custom panels for clients.

The problem facing researchers during tight times on both the client and provider side is that more insights and a greater impact are expected of them, all in a setting in which there are fewer dollars and resources to go around. So how do you do more with less?

Researchers at client companies reported they are doing the following:

- putting more dollars into online focus groups and one-on-ones and fewer into offline ethnography;
- moving tracking studies online;
- doing more qualitative within quantitative to add more insights;
- combining quantitative and ethnography, to maintain their position within their companies as generators of data about customers while also getting to know them better; and
- conducting more online research in-house with their own resources and panels.

Accelerating a transformation

In general, Chadwick feels that the recession is just accelerating a transformation that had already been under way for some time. As we move into the Web 2.0 environment, research is evolving from being a type of interrogation (we ask, you answer) to being more of a dialogue with respondents.

Research also now involves a lot more listening and observation. There are countless forums through which consumers can express themselves these days, from the product reviews they post online to their tweets, blog postings and chat discussions. With information available from so many different types of sources, researchers of all stripes need to train themselves to be integrators of information, Chadwick said, to mine for insights, wherever they may be, and then become storytellers to communicate those insights in ways that individual audiences will respond best to.

One slide I particularly liked showed what Chadwick called the "molecular structure of Research 3.0," with primary research in the center and a surrounding collection of other types of data gathering or sources of data, from ethnography; secondary research; Web-based listening posts like social media, Web and CRM analytics; knowledge mining (looking back at previously-gathered data) and data mining.

In this vision, research moves from being merely about conducting surveys toward a broader approach in which a project isn't the product of a single survey. Instead, it encompasses a number of different (and potentially disparate, I would add) sources and the emphasis goes from data collection to data synthesis.

No single researcher can be versed in all of those areas, so the industry will need to broaden its outreach when it comes to attracting new talent to the industry, Chadwick said. Along with the essential statisticians and methodologists, he talked about recruiting Renaissance men and women, video gamers, writers, data miners and others.

Bright future

This Research 3.0 vision was the part that got me jazzed and made me hopeful that research can have a bright future. Far from the stereotype of the inflexible, numbers-obsessed sticklers (you know who you are), most researchers I have met have a strong creative streak and seem to enjoy the type of problem-solving tasks that each research project throws at them.

In my two decades at the helm of this magazine I have seen the industry adapt with admirable speed to the advent of the Internet. Sure there have been some missteps but with the many and varied applications of technology (Web-based and otherwise) to the research process that are coming to light each day, it's clear that researchers are embracing change and seeing the promise that a creative, holistic approach of the kind outlined by Chadwick can not only help make the research function more relevant to today's businesses but can also make the field an interesting, challenging and, dare I say, fun place to work. | Q

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before you go...

online and offline
News about Quirk's and quirks.com

Quirk's goes to the ARF
Quirk's would like to thank all of those who stopped by our booth at the recent ARF conference in New York. Our Dan Quirk and Evan Tweed said it was great to see old friends and meet new ones. From talking to people at the conference, it seems that January and February were rough months for research firms - especially on the qualitative side. We were glad to hear that most people at the show reported an uptick in research activity for March. Let's all hope that trend continues!

Don't know your MCASI from your ACASI?

Has your boss or colleague used a market research term or acronym that you're not familiar with? Next time this happens, just nod as if you know what they're talking about and then hightail it to www.quirks.com/glossary. Our glossary contains nearly 1,600 market research terms and definitions. You'll never look foolish again and you may learn so many terms that next time you can be the one spouting jargon with authority.

Get to know your moderator
We're not sure if a picture is indeed worth a 1,000 words, but we have added moderator photos to the online version of our Directory of Focus Group Moderators. Now, when searching through our database of 1,200+ moderators, you not only will learn about their experience and specialties but if the moderator opted to include his or her photo you will also become more familiar with their (hopefully) smiling face.

cover-to-cover
Facts, figures and insights from this month's issue

> Online coupons account for 1 percent of all coupons offered nationwide, but their use is growing quickly, with redemptions jumping 140 percent last year. *(page 8)*

> Sometimes a lowly hostess at a facility has a brilliant observation. It is a wise team that will listen and incorporate her ideas into their next process. *(page 22)*

> Practitioners feel the added pressure to quickly produce reliable results, even if new market research approaches are being implemented. However, they view the renewed debate and focus on the value of market research as worthwhile and say it helps create an invigorating and dynamic environment in which to work. *(page 45)*

> Miller and Orban say that there are several key traits to look for in a prosumer, including no conflict of interest, a consumer connection with the topic area, knowledge relative to the topic, experience with new-product development and creative problem-solving skills. *(page 55)*