QUIRK'S
Marketing Research Review

JULY 2009

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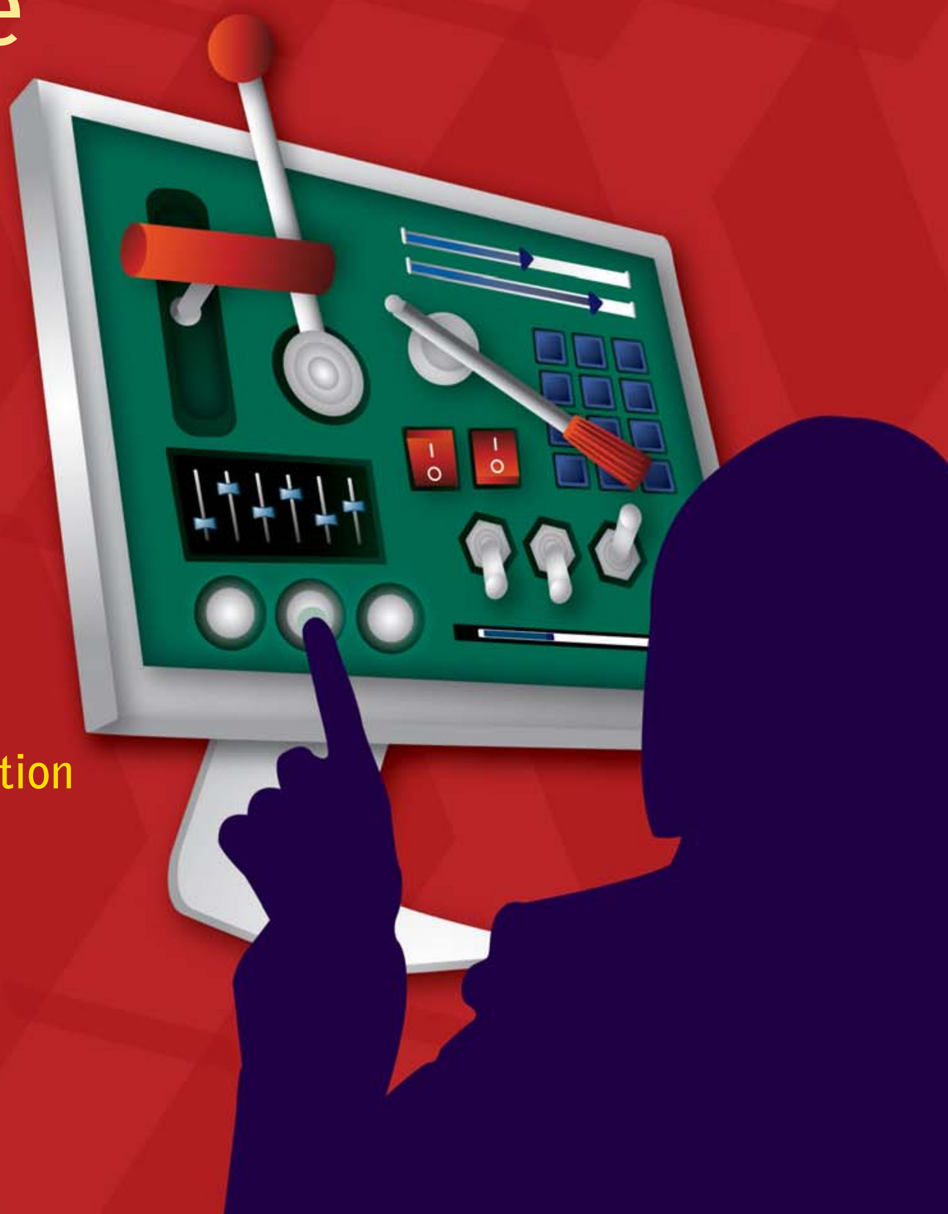

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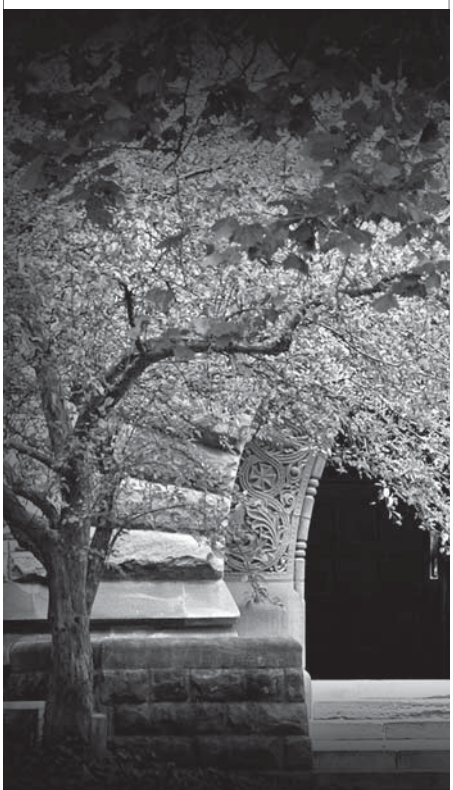

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Los Angeles	Feb 24-26
Chicago	Apr 28-30
Baltimore	Jun 9-11
San Francisco	Aug 18-20
Cincinnati	Oct 20-22
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Cincinnati	Mar 10-13
Cincinnati	Apr 21-24
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Cincinnati	Jul 14-17
Cincinnati	Aug 25-28
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Cincinnati	Nov 17-20

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Cincinnati	Jul 20-23
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in case you missed it...

news and notes on marketing and research

New service helps bargain hunters and retailers alike

Priceline.com's unique business model of naming your own price is finding its way into other online retailing markets. Instead of sitting around, waiting and watching for the perfect gift for your wife, husband or good friend to go on sale from your favorite online retailer, a new online price-capture service can watch for you - making sure you don't miss out. Based on market research and analytic models from Cornell University, Ithaca, N.Y., Pricewhispers integrates its service directly with participating retailer Web sites to allow shoppers to specify the price that they would pay for the item and an expiration date for their price commitment. Then, the retailer will contact the shopper if and when his or her bid has been accepted.

While the benefit of convenience to the consumer is obvious, the Pricewhispers service is founded on pricing science principles and can increase a participating retailer's bottom line as well as help gather information regarding the amounts consumers would be willing to pay (and how long they would wait to pay for it) for goods and services, allowing stores to adjust their prices accordingly. Analytic models and simulations show that this service can increase online revenues and profits 6-12 percent for retailers by enabling them to segment their consumer base by price sensitivity and to reduce the chances of missing out on some of those sales.

Pricewhispers comes hot on the heels of consumers coming to demand a significant level of participation in their online activities. According to market research conducted by Cornell University in late 2008 and early 2009, over 84 percent of respondents across Canada and the U.S. would like to have a similar level of input via a participative shopping service.

Lavish & Lime and Lemon Lime Kids are the first two Canadian online retailers to partake in Pricewhispers.

Utility meets style in the shower - the metrosexual (r)evolution

The metrosexual market segment has morphed, and packaged-goods giants like Procter & Gamble, Unilever and Dial have identified the next hot demographic in male grooming: men who are interested in a more clean-cut appearance but aren't obsessing over pomades and lip balms, according to Elaine Wong's May 16, 2009, article "P&G, Dial, Unilever Target the Middle Man," in *Brandweek*. As P&G representative Glenn Williams said, this new everyday man falls somewhere between "metrosexual and Neanderthal."

P&G researchers spotted the care men take in their hygiene and appearance several years ago while studying male grooming habits in the shower. Old Spice, which was branching out into the body wash category at the time, discovered that men used their significant other's shower products, but secretly longed for their own.

"They'd have the body wash in their shower, but they'd take it out or hide it [when their friends came over], or they'd be really secretive when they shop in that aisle because they felt this was something they could use, but it sacrificed their masculinity," said P&G North American hair rep Brent Miller, who once worked on Old Spice. "They loved the benefit, but felt it wasn't something made for them."

These middlemen equate good grooming (which includes such previously-feminine beauty items as body wash) with success and confidence. Being men, though, many want their products to have demonstrable utility - often through multiple uses, such as Old Spice's all-in-one High Endurance Hair and Body Wash. A recent study on behalf of P&G's Gillette brand, conducted in partnership with New York public relations firm Porter Novelli, found "success" and "confidence" to be extremely important traits among this group. But P&G's not the only one going after this demographic. Nivea is introducing what it calls the first body wash, shampoo and shaving cream combination in summer 2009 to "get more done in the shower." Dial, meanwhile, has debuted Dial for Men Magnetic, the first pheromone-infused body wash that offers "attraction enhancing" benefits. Unilever's Axe created a men's hair care line following rival P&G's Gillette launch in June 2008.

Chains cannot live on pizza alone

Some of America's most well-known pizzerias are getting creative with their menus. Domino's and Pizza Hut, among others, are offering sandwiches, pasta and other grub to broaden their appeal, bolster sales and hopefully draw cash-strapped customers away from the frozen-foods aisle of the grocery store, where many consumers have turned to get their pizza fix during tough financial times, according to Jaclyn Trop's April 21, 2009, article "Pizza alone not cutting it: Chains roll out new entrees," in the *Detroit News*.

Domino's, the second largest pizza chain in the U.S., added oven-baked sandwiches at $4.99 a pop to its menu. "We're trying to preempt what we call the veto vote," when a group nixes pizza because some would prefer to eat something else, said Tim McIntyre, a Domino's spokesman. Sales have been strong for its sandwiches, which include Philly cheese steak, chicken bacon ranch, chicken Parmesan and Italian flavors. Pizza Hut is also enjoying success with its new menu of pasta dishes.

Jeremy White, editor of trade magazine *Pizza Today*, said pizzerias "backed themselves into a corner with couponing and discounting" decades ago. The fierce competition on price is forcing restaurants to recoup their losses by boosting customer orders - not by raising the cost of menu items.

A national trend toward saving money by cooking at home, coupled with rising costs for raw ingredients, including cheese, meat and flour, has pizzerias squeezed at both ends. Domino's profits fell 32 percent last year and the company closed 108 stores in the U.S. According to *Pizza Today*, there are about 70,000 pizzerias in the U.S., and 2009 could be the first time in recent history that the industry sees more pizza shops close than open.

The affluent seek value the same as the rest

For several years, luxury retail and marketing consultants have fed the media with anecdotal research about the sales of $700 Manolo Blahnik shoes, $1,000 Prada handbags, and $250 True Religion jeans as though such sales are commonplace. But the affluent women in a survey of the wealthiest 10 percent of U.S. households by The American Affluence Research Center (AARC), Alpharetta, Ga., report they are more likely to spend less than $120 for nice shoes, less than $100 for a purse for every day and less than $75 for a pair of women's jeans.

"Luxury is a very ambiguous word that is used very loosely," says Ron Kurtz, president of AARC, who observed that "the definition of luxury varies considerably by individual and by product."

Survey respondents were asked to specify the most they could imagine spending for 37 different products and services. They were also asked to name the brand they would most likely purchase for each of the items. Both men and women were asked about the same 15 products and services. The wealthy women were asked about an additional 11 gender-oriented products and the affluent men about an additional 11 products.

Both men and women were asked to provide a price (the median value of the price reported by men/women is shown in parentheses) and a brand for a new auto ($40,000/$35,000) for personal use, a room in the winter in a Caribbean resort ($300/$250 per night), a European cruise ($300/$300 per person per night), a hotel room in New York ($300/$300 per night) for a vacation, a refrigerator ($1,500/$1,500), an original painting ($3,000/$3,000), a washer/dryer set ($1,500/$1,500), a king-size mattress ($1,000/$1,500), a set of linens for a king-size bed ($200/$150), wall-to-wall carpet ($20/$20 per square foot), a watch for dressy occasions ($1,000/$500), a watch for every day ($130/$150), a bottle of wine ($40/$30) for a special dinner at home, frames for sunglasses ($125/$150), and a large 24-inch wheeled garment bag ($200/$150).

Women were asked to provide a price and a brand for a dressy suit ($250), shoes ($120) to go with the dressy suit, a cocktail dress ($200), shoes ($100) to go with the cocktail dress, a pair of jeans ($75), a pair of diamond stud earrings ($1,000), a purse ($100) for every day, skin rejuvenation cream ($50 for 1.7 ounces), liquid makeup/foundation ($25 for one ounce), a bottle of perfume ($60 for 1.7 ounces), and lipstick or gloss ($15).

Men were asked to provide a price and a brand for a business suit ($500), shoes ($200) to go with the business suit, dress shirt ($75) to go with the business suit, a tie ($50) to go with the suit, a tuxedo ($500), shoes ($125) to go with the tuxedo, shirt ($75) to go with the tuxedo, a sport coat ($250), slacks ($100) to go with the sport coat, a dressy long-sleeve sport shirt ($75), and dressy short-sleeve sport shirt ($50).

Contrary to assertions by some luxury market consultants that the current economic problems are creating longer-term changes in their lifestyles and reductions in spending on luxury and conspicuous consumption by America's wealthy, most of the affluent are behaving like their normal, rational and frugal selves. Their careful spending is not a new trend.

While the concepts of "stealth wealth" and "luxury shame" are now being advanced by the retail and luxury consultants and futurists through anecdotal research about cutbacks in the spending on ostentatious luxury, Kurtz says "the sale of luxury goods and services, as defined by the majority of America's affluent, is not subject to much change in 2009, just as it has not shown much change over the past 30 years." For more information visit www.affluentresearch.org.

Loyalty industry fights middle-age bloat

Membership in travel and hospitality industry loyalty reward programs has climbed to 556 million in 2009. Airline frequent flyer programs reached 277.4 million, up 9 percent (since 2007); hotel reward programs reached 161.9 million, up 26 percent; and gaming reward programs reached 106.0 million, up 37 percent, according to the 2009 Colloquy Loyalty Census, a study conducted by Cincinnati research company Colloquy that measures the scope of U.S. loyalty marketing.

But don't read too much into the growing numbers. Of the overall 1.8 billion loyalty rewards program memberships, Colloquy pegs the number of active memberships in U.S. loyalty programs at 792.8 million - a number that the study's authors characterize as "one of the worst-kept dirty secrets of the industry."

Definitions of active memberships vary from company to company;

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names of note

Stamford, Conn., research company *InsightExpress* has promoted three members of its custom marketing research group: **Ed Agvent** to director, advertising solutions; **Ryan Price** to director, service and leisure sector; and **Jamie Huffman** to account executive, technology sector.

Kim Dedeker has joined Fairfield, Conn., research company *Kantar Group* as chair, Americas.

Language Logic LLC, a Cincinnati research company, has named **Dean A. Kotchka** president and CEO. Kotchka succeeds **Richard Thoman**, who has assumed a new role as chairman of the operating committee.

Clarabridge, a Reston, Va., research company, has expanded its management team with three new hires: **Brendan Haggerty**, vice president, engineering; **Sean Phillips**, vice president, product development; and **Jack Mok**, western regional technical account manager. Clarabridge has also promoted **Gene Sohn** to chief architect.

David E. Kerr has been named senior vice president, business development, of Saddle River, N.J., research company *PDI Inc.*

Jo-Ann Foo has joined Kuala Lumpur, Malaysia, research company *Kadence* as associate director. Foo will be based in Australia.

Rochester, N.Y., research company *Harris Interactive* has appointed **Richard Scionti** as global CTO.

London research consultancy *Opinion Leader* has hired **Frances Chinemana** as research director.

St. Petersburg, Fla., research company *Horizon Marketing Group Inc.* has named **Heather Pavliga** senior account manager and marketing strategist.

London research company *Verve Partners* has made several appointments: **Emma Morioka**, partner, proposition development; **Ailean Mills**, consultant, qualitative community engagement; and **Clare McHatton**, associate account director. Verve has also appointed **Patrick Barwise**, **Gareth Firth** and **David Packford** as founding members of the Verve advisory board.

Morioka **McHatton**

The Marketing Research Association (MRA), Glastonbury, Conn., has announced its annual board of directors. **Kim Larson** of Information Alliance will serve as MRA's 2009-2010 president. **Jon Last** of Sports and Leisure Research Group will serve on the board as past president; **Elisa Galloway** of Galloway Research Service Inc. as president-elect; **Ken Roberts** of Cooper Roberts Research as treasurer; and **Kevin Lonnie** of KL Communications as secretary.

The following research professionals will join MRA's board as directors at large: **Debbie Schlesinger-Hellman** of Schlesinger Associates; **Marisa Pope** of Jackson Associates; **Jill Donahue** of Nestle Purina PetCare Company; and **Adam Weinstein** of Authentic Response.

Joining the board as workgroup chairs are **Diane Kosobud** of Ipsos North America; **Janet Savoie** of M/A/R/C Research; **Angela Lorinchak** of Metro Research Services; **Magda Cooling** of Opinions... of Sacramento; and **Ted Donnelly** of Baltimore Research.

Paris research company *Ipsos* has appointed five new directors: **Patrick Artus**, **Marina Eloy-Jacquillat**, **Gilbert Saada**, **Hubert Védrine** and **Pierre Le Manh**. Ipsos has also renewed the terms of office of existing independent directors **Yves-Claude Abescat** and **Yann Duchesne**, as well as of **Laurence Stoclet**, financial officer, and **Henri Wallard**, deputy CEO.

Resolution Research, Denver, has hired **Tony M. Dubitsky** as research analyst.

London research company *forgetdata* has named **Collette Curson** director, development.

Cincinnati research company *Burke, Inc.* has promoted **Jodie McInerney**, **Sandip Narang**, **Terri Catlett** and **Todd Jacobson** to senior vice president, client services; **Stacy McWhorter** to vice president, senior account executive, client services; and **Steve Perkins** to vice president, senior account consultant, client services.

Research Now, London, has hired **Miles Worne** as managing director, business development. **Konstanze Just** has also joined the company to lead the global corporate marketing team.

Images USA, an Atlanta marketing communications company, has made two promotions in its market research department. **Marianne Anderson** has been named director, project management, and **Rachelle Jackson** has been named senior research analyst.

Boston research company *Communispace* has appointed **Paula A. Sneed** and **John R. Lauck** to its board of directors.

Ipsos Understanding UnLtd., a Cincinnati research company, has hired **Jill Wittman** as vice president, innovation and qualitative research.

product and service update

GfK Healthcare debuts two new tools

GfK Healthcare, a Blue Bell, Pa., division of Nuremberg, Germany, research company, The GfK Group, has introduced FlashPoints, a custom quantitative mini-study focused on delivering information on physicians' perceptions and behavior within a short time frame. With survey results delivered in one week, the mini-study is designed to provide clients feedback on various time-sensitive issues. FlashPoints can be used to get a quick pulse following a market event or to obtain basic insights on physicians' perceptions and prescribing behavior.

FlashPoints is conducted with 100 physicians - including a wide range of specialists and primary care physicians - accessing GfK Healthcare's physician community or using the client's target list. The survey allows for up to five closed-ended questions, with the option of using open-ended questions for an additional charge.

Additionally, GfK Healthcare has launched Treatment Tracker, a syndicated research service intended to offer physicians' brand preferences, current and anticipated future prescribing practices, patient treatment algorithms, unmet market needs and other insights across 30+ disease states. Treatment Tracker aims to allow clients to tailor reports to draw out only the specific data that is most relevant and critical to their particular information needs.

A number of enhancements are planned for GfK's Treatment Tracker, including more frequent data collection and reporting and an expansion into global syndicated studies. For more information visit www.gfkhc.com.

New panel dives into niche sports and leisure activities

TNS Travel and Tourism, a London division of Horsham, Pa., research company TNS, has launched an activities-based research panel designed to investigate previously-unreachable groups based on their participation in niche sports and leisure activities. Companies and organizations in the tourism and leisure sectors can engage with individuals - filtered by 25 specialist activities - who take part in ethical holidays, enjoy parachuting or scuba diving, visit film locations or go on spa breaks. The Activities' Panel draws from an online panel of 500,000 adults in the U.K., France, Germany, Italy and Spain and profiles respondents through leisure participation, age, gender, vacationing behavior and media preference. For more information visit www.tnsglobal.com.

Researchers collaborate to form VideoDiary panel

Research companies QualVu, Evergreen, Colo.; EasyInsites, Surrey, U.K.; and Cint, Stockholm, Sweden, have partnered to build the VideoDiary research panel, which is geared toward brands seeking access to screened participants for qualitative research. The panel will be built by screening participating panels in the Cint Panel Exchange, which comprises 200+ panels across 30 countries.

VideoDiary utilizes QualVu's SystemInsite technology for identifying whether a panelist has a Webcam, microphone and other key attributes to determine if a panelist is ready for video creation and collection. QualVu will also provide the technology platform for preparing, collecting and analyzing the video content through the use of their VideoDiary and VuPoint tools.

EasyInsites will be the primary full-service research agency offering this service and has created a product called EasyVideo as a part of its EasyQual product set. EasyVideo is designed to help clients create a qualitative session on video whereby questions are posed by a moderator, chosen by the client or by EasyInsites on behalf of the client. EasyInsites will then ensure the video is targeted and distributed to pre-screened respondents, either sourced from an EasyPanel (a client's custom panel that will be managed in the exchange) or from another set of respondents outside of a client's custom panel. Once fielded, EasyInsites will then provide a clip summary by selecting pieces of video content from each respondent and delivering a video report.

Cint's role in the partnership is to screen participating panels in the Cint Panel Exchange. The screening is intended to be ongoing and available to all users of the Cint Panel Exchange. For more information visit www.qualvu.com/video_diary.

TVG releases forecasting suite

TVG Marketing Research and Consulting, Dresher, Pa., has launched a suite of forecasting services focused on predicting share and forecasting revenue. The TVG Rapid Share Predictor is designed to provide access to patient share and share penetration (uptake) rates without the need to conduct primary marketing research or the use of analogs. The Predictor aims to allow companies to focus on attribute variables rather than identifying and defending analog choices.

In addition, TVG offers the TVG Custom Share Predictor, an evaluation of market share in the context of specific market parameters. This approach is designed to synthesize custom primary and secondary marketing research as input to choice modeling to provide an evaluation of potential product use.

Finally, the TVG Forecaster is a forecasting engine built to deliver revenue projections based on a product's specifications. TVG's forecasting experts design and define a modeling approach to reflect the way in which companies plan to market their product. TVG integrates the key inputs (market sizing information, pricing, compliance/persistence and competitive landscape data), and input

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research industry news

News notes

In response to efforts made by the **Marketing Research Association**, Glastonbury, Conn., to protect research with health care practitioners in Massachusetts, the **Massachusetts Department of Health** has issued official guidance exempting market research incentives from the application of the state's new Marketing Code of Conduct for pharmaceutical and medical device manufacturers.

The Department specifically exempted incentives from public reporting requirements, as long as health care practitioners who receive market research incentives "do not know what pharmaceutical or medical device manufacturing company" sponsored the research and the sponsor "does not know which health care practitioners participated in the study."

Ci Research, Cheshire, U.K., has confirmed its £2 million management team buyout to turn over the company. Managing director Ian Font and fellow investors Colin Auton, Andy Wright, Richard Walker and Katie Waterhouse will head up the new executive team.

Republican polling firm **Public Opinion Strategies**, Alexandria, Va., has resigned from U.S. Senator Arlen Specter's campaign team in response to Specter's switching political parties in April 2009.

PERT Survey Research, Bloomfield, Conn., has changed its name to The PERT Group.

Saskatoon, Saskatchewan, research company **Itracks** has noted a 40 percent increase in online qualitative activity in first-quarter 2009 over the same period last year. In addition, the company has conducted its 10,000th online qualitative focus group.

Calendar of Events July-October

IIR will hold a conference, themed "Shopper Insights in Action," on July 14-17 at the Hilton Chicago in Chicago. For more information visit www.shopperinsightsevent.com.

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.

TRC Market Research and the Philadelphia Chapter of the American Marketing Association will hold a market research conference, themed "Understanding Customers to Drive Business: Financial Linkage, Social Networks and Preference Measurement," on October 2 at the Union League in Philadelphia. For more information visit www.trchome.com.

The AMA will hold its annual marketing research conference on October 4-7 at Desert Springs JW Marriott Resort and 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 The Market Research Event 2009 on October 18-21 at the Red Rock Casino Resort and Spa in Las Vegas. For more information visit www.iirusa.com.

PMRG will hold its annual meeting of The PMRG Institute, themed "Tools for Maximizing Brand Potential," on October 25-27 at the Sheraton Philadelphia City Center Hotel in Philadelphia. For more information visit www.pmrg.org.

ESOMAR will hold its annual online research conference, themed "Online Panels and Beyond," on October 26-28 in Chicago. For more information visit www.esomar.org.

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

Stix Market Research, Kerrville, Texas, celebrated its 10th anniversary in April 2009.

Acquisitions/transactions

An investor group, including Boston firms Spectrum Equity Investors and Bain Capital Ventures, has entered into an agreement with Portland, Ore., online survey creation company **SurveyMonkey** to acquire a majority stake interest in the company. As part of the transaction, Dave Goldberg will become CEO of SurveyMonkey and a minority investor in the company. Financial terms of the transaction were not disclosed.

London research company **YouGov** has acquired Princeton, N.J., research company **Clear Horizons** for an initial $600,000. The fee could rise to $2.7 million based on certain performance targets over the next three years.

Bloomfield, Conn., research company **The PERT Group** has acquired two research companies: **Market Directions Inc.**, Kansas City, Mo., and **Pulsar Research**, Storrs, Conn. Both companies will continue to operate as part of The PERT Group.

Alliances/strategic partnerships

Two State College, Pa., research firms, **Diagnostics Plus** and **Market**

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By Michael Carlon

A moderator's guide to working with the creative department

I started my research career at Modem Media, one of the first digital marketing agencies. Founded in 1987, Modem is credited with developing the first commercial Web sites and online advertising campaigns. Modem was also the first online agency to have a dedicated research department, of which I am proud to have been a part. We pioneered the use of online surveys, online focus groups, Web site usability testing and online bulletin boards. We did our part to help grow suppliers who were entering this field and we broke a lot of rules. It was a great time to be in research!

While my job was exciting, it became clear, after a while, that there was a tension between those of us who worked in research and those who were responsible for creating the ads/Web sites/technology that paid the agency's bills (and ultimately my salary). Research was viewed as a department whose job it was to run "beauty pageants" for different ideas that creative teams spent their time and talent bringing to life.

This tension personally came to a head for me when I received a call from the president of the agency, Bob Allen; an imposing figure for those who did not know him well. I was to come to his office immediately. Upon stepping into his office, with my heart beating in my throat, he looked me in the eye and said "I got a call from a creative team who complained to me that you s--- on their creative."

At the core of this complaint was one statement in a report I wrote summarizing consumer reactions to a Web site we had created years before. The team had just won a project to redesign the site and, as we began this redesign, we thought it wise to solicit input from frequent site visitors on what worked well, what did not work well, etc., to identify areas for optimization. As such, I called out opportunities for improvement, but did so using language that was not as constructive as it should have been.

From this experience, and countless others, I learned a few important lessons that I carry with me to this day:

- In an agency, creative people and their talent are responsible for delivering the agency's product.

Editor's note: Michael Carlon is a moderator with Cincinnati-based MarketVision Research. Working out of the Stamford, Conn., office, he can be reached at 203-561-8843 or at mcarlon@mv-research.com. Michelle Ogren, another MarketVision moderator, contributed content to this article. To view this article online, enter article ID 20090701 at quirks.com/articles

snapshot

Evaluating creative elements in the focus group setting need not be fraught with tension. The author offers five tips for making things go as smoothly as possible, including starting on a high note, providing context and showing solidarity with the creative team.

Their concerns are listened to above all others.

- It is a natural instinct to defend the fruits of one's labor and developing creative is indeed a labor of love. Evaluating someone's creative output is akin to talking about their child.
- No matter the intention of your message, it can sometimes be misinterpreted.

There was a time when I dreaded working with creative teams due to the tension that exists whenever someone is asked to evaluate their output. Over time, though, I became empathetic to the sensitivities of my creative counterparts and started putting myself in their shoes. After all, I view what I do as a creative endeavor and get extremely defensive when someone challenges something I have written.

So, over the years, I have adopted techniques to evaluate creative efforts that are more in line with the sensitivities shared by most people who create things. I hope you will find the following five considerations helpful the next time you are faced with a project that calls for the review of different creative treatments:

Consumers are not copywriters and/or art directors. When you ask consumers to evaluate creative, keep the objectives of the brief in mind as you probe into their reactions. Research about creative is most effective when it identifies whether a creative treatment links back to its intended communication (stated in the brief) and not what people like or dislike about specific elements.

If the creative treatments communicate what they intend to, it is important to document the elements that work. If they are not working, it's important to provide direction on where the communication may be breaking down. As such, I find it critical that the agency team walk me through the vision behind their work well in advance of reviewing it with consumers. I not only become better educated on the objectives of the research but also find that knowing the intended meaning behind each creative element helps direct my probing during the groups.

Start on a high note. When reviewing general reactions to a creative treatment in a focus group setting, start the discussion with those participants who express positive feelings toward it. Though we never want to bias a discussion, it is important to identify the elements that work and understand why they are important. If you start with the negative, you may not get the cleanest read on what is working. When turning the discussion to those who were less-positive, keep your probing framed in a positive fashion. Instead of asking "What don't you like about this execution?" ask "How can this execution be improved?" While the difference may appear subtle, creative teams become less defensive about criticism when participants appear to be helping them improve what is not working vs. telling them their "baby is ugly."

There was a time when I dreaded working with creative teams due to the tension that exists whenever someone is asked to evaluate creative.

Provide context. Include a section in your interview guide that helps explore the backdrop against which consumers are providing their reactions to the creative. For example, in groups where you are reviewing some online advertising ideas, be sure to address reactions to online advertising in general, what makes a good online ad, what makes a poor ad, situations where one might be more receptive to online advertising, etc. This context may help provide direction to creative teams when optimizing tested executions.

Don't let creative evaluation be the first research that is done on a particular project. Influence the creative teams you work with to include insight-generating activities early in the creative development process. Helping creative teams experience the target for whom they are creating reduces the chances that a campaign idea might be off the mark. (For more information on how to do this, see my article "Moving from validation to inspiration" in the October 2007 issue of *Quirk's*.)

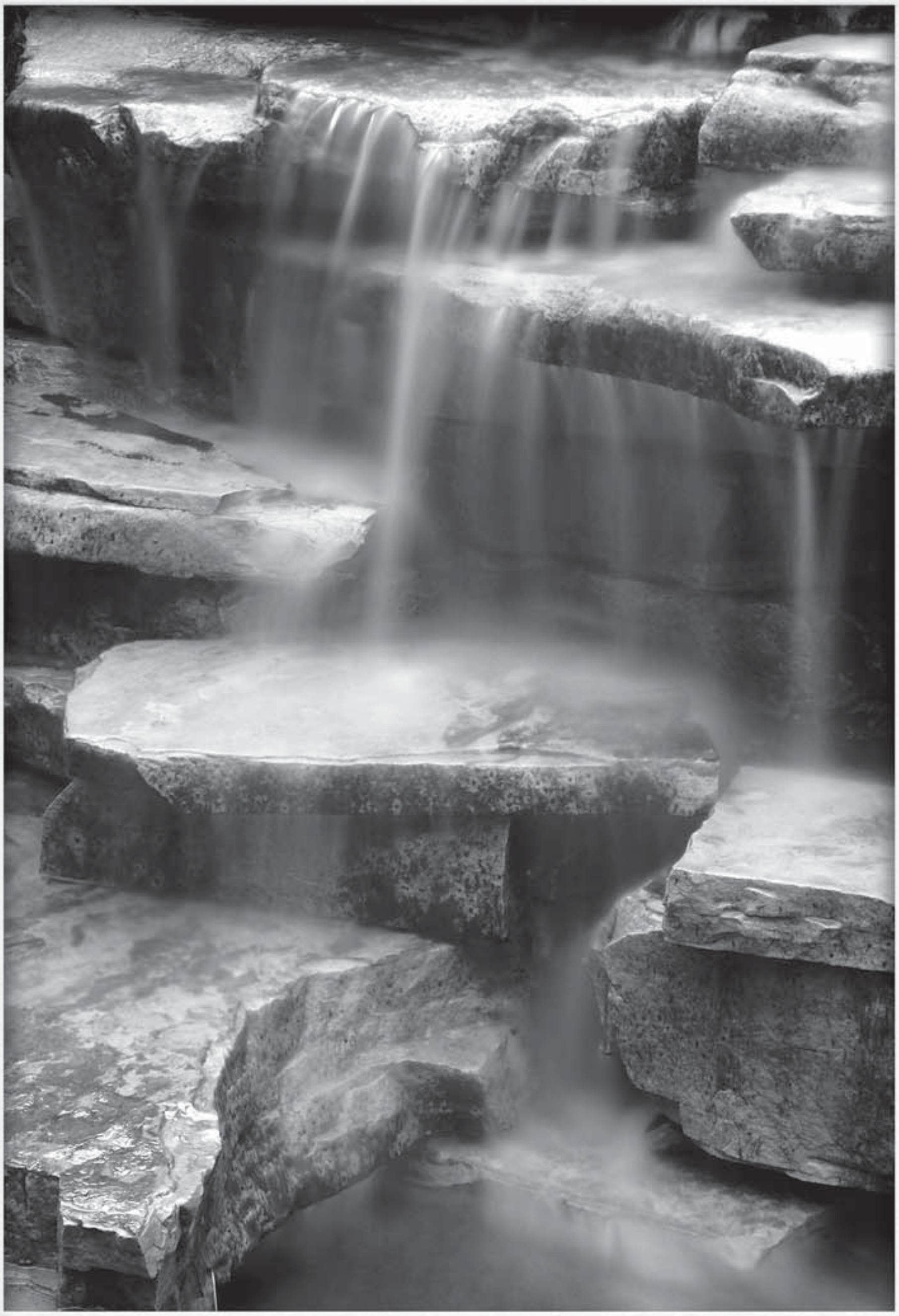
Don't hang the creative department out to dry. If an idea is totally tanking, the moderator may need to fight for it a bit (in an objective way) in order to a) completely understand the problems that exist and b) show some solidarity to the greater team. It's more difficult for the creative agency to shoot the messenger if the agency gets the sense that the moderator is in the trenches with them.

Always be tension

There will always be tension between creative teams and researchers, regardless of whether consumer research is viewed as an invaluable part of the creative development process or as a necessary evil. The extent to which this tension is healthy is entirely up to the personalities on both sides of this aisle. Researchers looking to improve their relationships with creative teams must keep in mind that there are constructive and non-constructive ways to evaluate creative. It is my hope that more of us take the former path rather than the latter. | Q

Immerse yourself

Enter article ID 20071009 at www.quirks.com/articles to read Carlon's article on using immersion programs to introduce stakeholders to their target consumers.



By Pete Cape and Jackie Lorch

The tortoise and the hare: a cautionary tale

A client recently contacted our firm, Survey Sampling International (SSI), to express concern about speeding respondents in her sample. In contrast to the client's own pre-tests, which indicated 25 minutes as a reasonable completion time for the questionnaire, it looked as though 8 percent of the respondents had taken less than 10 minutes to complete the study - an impossibly fast time, the client believed.

The client questioned why these "extreme speeders" had not been removed from the study, leaving her with only those people who would complete the study at a slower, more reasonable pace.

This was a fair question. Sample providers are in the business of supplying careful, attentive respondents, and as standard practice, SSI, along with most sample providers, supports client projects by replacing respondent cases that display quality issues, including speeding.

But we were curious and decided to look into the data in more detail. Was there something unusual about this study design or this questionnaire that could have caused or contributed to a tendency to speed? And, more importantly, would removing results from the fast survey-taking "hares," and retaining only the tortoises who had completed in a slower, more deliberate manner, bias the survey data in some way?

An examination of the questionnaire and the data provided some answers.

As expected, the fastest survey-takers were more likely to straightline their answers (or at least show very little variance in their responses). As Table 1 shows, one-third of those taking less than 10 minutes to complete the survey straightlined the first question.

As Table 2 shows, the outcome was similar on question two.

Jumping forward to Q14 (Table 3) shows the "problem" getting worse (although Q14 has only five items, so straightlining is a more reasonable response).

However, the key finding here is that there was a strong correlation between speeding respondents and respondents who had little or no interest in the survey topic. Respondents were asked how much they cared about the survey topic, and Table 4 clearly shows that those for whom the issue is of no or little concern were more likely to complete the questionnaire in

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snapshot

While speeders are not desirable, their actions can serve a useful purpose by pointing out ways to improve surveys that may be too long, too daunting or focused on a topic that is not sufficiently interesting to respondents.

Table 1: Variance Q1 by Time Taken (indexed on 20-25 minutes)							
Variance	< 10 mins	10-15 mins	15-20 mins	20-25 mins	25-30 mins	30-35 mins	35 mins+
0	825	325	125	100	200	100	125
1	300	200	157	100	57	257	57

Table 2: Variance Q2 by Time Taken (indexed on 20-25 minutes)							
Variance	< 10 mins	10-15 mins	15-20 mins	20-25 mins	25-30 mins	30-35 mins	35 mins+
0	1000	800	100	100	0	700	0
1	413	138	125	100	163	138	25

Table 3: Variance Q14 by Time Taken (indexed on 20-25 minutes)							
Variance	< 10 mins	10-15 mins	15-20 mins	20-25 mins	25-30 mins	30-35 mins	35 mins+
0	700	386	100	100	57	157	100
1	186	171	129	100	107	79	29

Table 4: Time Taken by Saliency				
	no consideration	low priority	medium priority	high priority
< 10 mins	31%	8%	4%	8%
10-15 mins	26%	25%	17%	14%

under 15 minutes.

Similarly, those who completed faster were more likely to have said they have no consideration of the issues or they were a low priority. Fifty-seven percent of those who had no interest in the topic completed the questionnaire in less than 15 minutes, compared to 22 percent of the people who said they cared a lot about the subject.

Straightlining is not necessarily a problem when due to lack of saliency - assuming the respondent straightlines the "right" answer. In the case of some of the questions in this survey, someone who had no interest in the topic could legitimately straightline through many of the responses.

So what to do? Industry standard practice says we need to replace the speedsters. But if we do that, we are very likely to replace them with people who care about the topic, thus biasing the answer to the "How much do you care about this issue?" question.

Further if respondents who did not care about the topic were rushing through the survey, they might also be more likely to drop out. After examining the data, this hypothesis (Table 5) was also proved correct.

The dropout rate among those respondents for whom the survey topic was not even a consideration was more than 50 percent higher than the average drop rate for the survey.

So, does the industry standard practice of replacing dropouts and speeders with "fresh, attentive" sample cause a worrisome bias in the survey data itself? Should the practice be changed? And how might speeding behavior be discouraged?

The study had some characteristics which could have made it a fertile environment for speeding:

- It was very long, at 25-30 minutes, for a topic which ranks low on the "passion" scale.
- It was quite challenging to complete, with 67 questions asked about one specific item, followed by an almost identical set of questions to be answered for another item, followed by the same questions relating to two further items - over 250 questions in total.
- The survey also assumed that respondents had definitely purchased each specific item,

possibly forcing a respondent to answer detailed questions about a product they had never bought.

- The study contained multiple grid-style questions, and their impact can clearly be seen by analyzing dropouts. Of the 134 who completed the last screener but not the whole questionnaire, only one was left at the last of the grid/product questions. Large dropout rates are seen at the first sight of the grid (Table 6), the first repeat of that grid and then the change to a new product and the subsequent repeat of that grid.

How could the survey be improved?

- Either remove some of the questions or rotate a subset of the questions for each respondent to provide a shorter questionnaire experience for everyone (i.e., 4,000 people answering 160 questions provides more data than 2,500 people answering 250).
- Ensure that the questions are ones that the respondent is able to answer (i.e., the questions should refer to a product that the respondent has bought).
- Identify the interest level at the start of the survey, and branch those respondents who have less interest in the topic to a shorter subset of questions, thus retaining important answers from the less-involved subset of the population within the data set.

Table 5: Drop Rate by Saliency Compared to Average

	Drop out
No consideration	52% higher
Low-priority	5% higher
Medium-priority	10% lower
Issue is high-priority	10% lower

Table 6: Dropout Points

Question	% dropping out
Last screener	0%
First grid	28%
First repeat of grid	31%
Second repeat of grid	7%
Third repeat of grid	4%
Product change, first grid	10%
First repeat of grid	7%
Second repeat of grid	1%
Last grid question	10%

- Where possible, introduce items into a grid question that make straightlining a less realistic option. While not preventing the behavior, it does make identification easier.

Deserve a second look

The lesson learned from this case study is that speeding-respondent situations deserve a second look. The questionnaire design and response data should be carefully examined whenever poor respondent behavior is suspected, because there may be legitimate reasons why the respondent has sped through the survey. Moreover, if the population under study is made up of "animals" of all types, merely replacing all the hares with tortoises may put the researcher on a fast track to poor-quality research results. | Q

Slow down the speeders

Enter article ID 20060708 at www.quirks.com/articles to learn how to uncover and control for speeders and cheaters.

By Tim Macer

Revelation qualitative software platform

Revelation provides a Web-based software platform for qualitative research data collection. It follows the bulletin board or asynchronous model, where participants are invited and will typically participate over an extended period of several days or weeks. However, unlike typical Web-based bulletin board or blogging software, Revelation is packed with capabilities that are finely-tuned to the needs of the qual researcher or moderator, so that data can be collected in a semi-structured way through sequences of questions or participatory activities.

The interfaces for both researcher and participant are very clear, attractively designed and easy to navigate. The software is deliberately non-branded, not even with the Revelation imprint.

The researcher interface centers around a dashboard, which provides an overview of all current activities and lists all postings by participants to any of your current studies under a "what's new" heading. Another area provides the tools to set up a project and a third area provides a range of filtering tools, to allow you to query and analyze your data to some extent, and to export reports and transcripts, which you can then analyze in greater depth in coding tools such Atlas.ti, NVivo, MAXQDA, winMAX or XSight. Unfortunately, there isn't currently any provision for transferring transcripts with any of the existing classification or tagging provided within Revelation.

The Project

The basic component of Revelation is the Project. It is a one-click action to create a project. The next step is to create the "activities" that will comprise your project. The idea is that you will be asking your participants to log into the project with a particular regularity (e.g., once every day for two weeks). Each time they log in, you need to have an activity ready for them to complete.

Revelation provides you with a toolbox of what it calls "stimuli and collectors" which you use to build up an activity. Six of them let you present stimuli – a piece of text to read, a still image, audio or video. You can also present a Web site or document, like a PDF. Another 16 allow you to collect different kinds of data. There are two for text: a single line of text;

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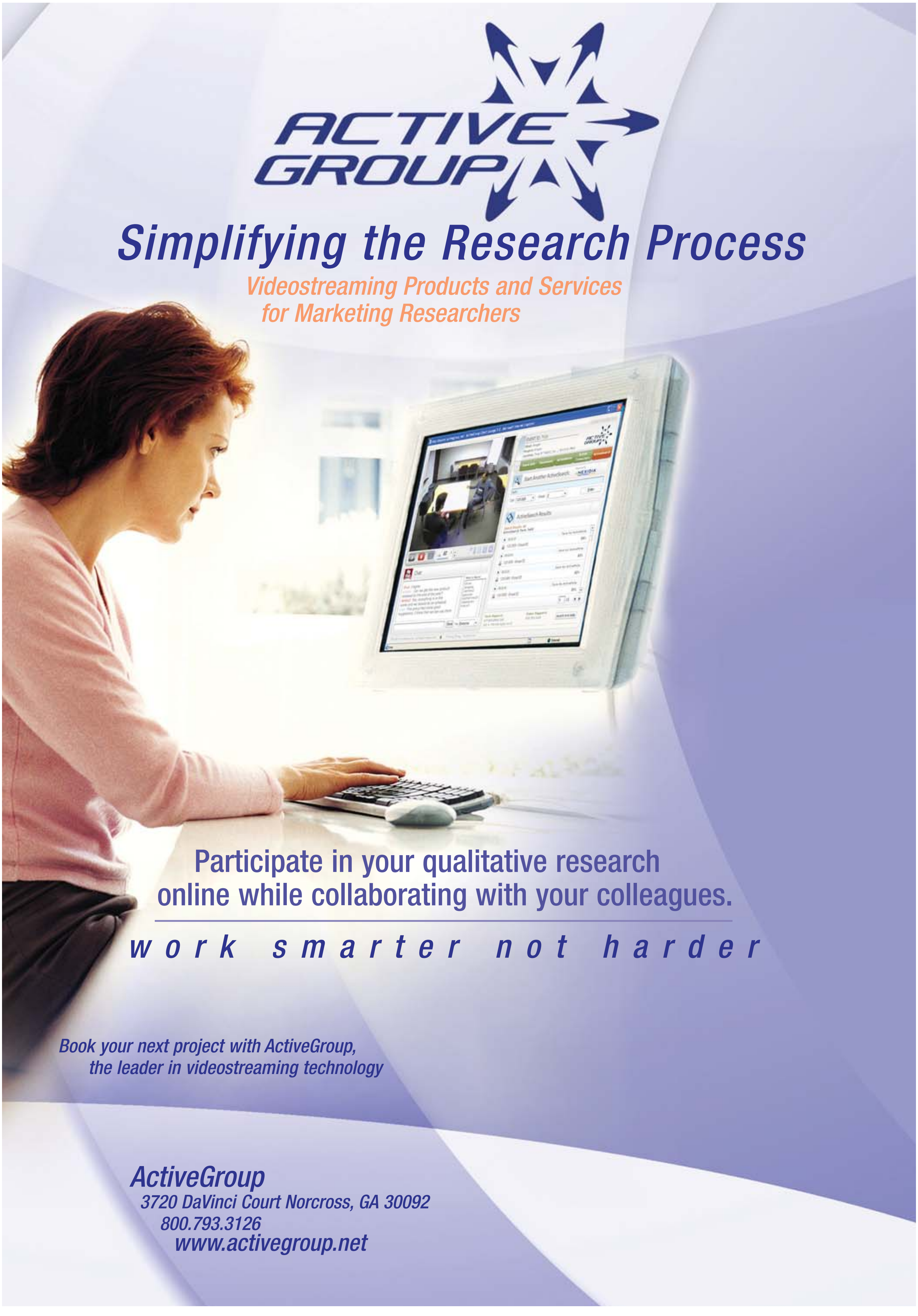
Revelation qualitative software platform (www.revelationglobal.com)

Pros	Cons
• Excellent range of tools for building structured participatory exercises online • Simple interface for moderators and participants • Automated release of invitations and reminders • Hosted solution that works on most platforms	• Fairly expensive • Unfamiliar and challenging method for clients to accept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or a block. You can collect radio-button or checkbox-type answers to pre-coded lists. There are fields for dates or monetary values, name, address and phone numbers. Then there are prompts to upload an image or a video, or the URL of the Web site, to take you into the area of Web 2.0 and user-generated content.

A task could therefore start by asking the person to upload a picture - say, a favorite vacation destination, or a picture specially taken of this evening's dinner - followed by asking them to add a single-line caption, a couple of pre-coded or yes/no questions relating to the picture, before several in-depth probes, asking for thoughts and feelings about different aspects of the picture or the occasion being discussed. The beauty of this software is in the flexibility that it provides for very simply building up these question-and-answer elements. Activities can be one-off, or they could recur, such as for a diary-type activity. You can also choose whether tasks are private or whether participation can be shared among the cohort of other participants, to allow for group activities. There is also a tool for creating discussion boards.

When you launch a project, you select and invite participants. There is an option to bulk-upload participants from a list (e.g., in Excel). You can also define demographic data or apply segments or categorizations and include these in the participant data - or ask them to provide this data by completing their profile when they first log in.

You then cue up your activities for release at a particular time - you could write all your activities in advance for a short two- or three-day study, or just have the first few prepared for longer studies, so that you can react to the material that is coming in.

A neat feature is the one-to-one message. You could be reading through the day's "what's new" and see a bit of information from a respondent and want to probe further. You can send them a message, and the response they make will even be plugged into their transcript in the right position when you come to analyze it. You can be selective in assigning tasks to participants - selecting them by demographic, by segment or by individual name, which provides another means to be individually responsive in your questioning.

It is something else

Diane Fraley is president of Chicago-based D.S. Fraley Associates, a firm that specializes in qualitative and ethnographic research. For the past two years, Fraley has been seeking new ways to use the Internet to carry out qualitative research more selectively and in greater depth. "I don't think of Revelation as software, I think of it as a new research methodology," Fraley says. "And I don't think there is anything else out there that matches it. It is not bulletin board and it is not chat: it is something else.

"I looked at bulletin board and I looked at live chat, and I had decided I would go the bulletin board route. Then I stumbled into Revelation and it fits how I do research, which is the deeper side of qualitative research. With focus groups you have an hour or two with your group, and I cannot do anything in that limited time frame that's in any kind of depth. From each participant, you get about 10 minutes talk time, maximum. You don't capture life moments like you can with this. You can even invite the rest of the family in, so you get a true perspective."

One of the first studies for which Fraley used Revelation was to reposition a beer brand with a strong regional identity. She recruited a group of young males, a key target group identified for the brand revival. Rather than run the conventional series of focus groups, she made the incentive more generous, and recruited a smaller group to a longer study. "I took these 25-year-old guys and had them online every day for six weeks. I spent a week finding out about them. Then I gave them three homework assignments to do. Because it was beer, I said to them, 'I want you document the occasions when you drink beer. Document an occasion when you drink beer by yourself; an occasion when you drink beer with a buddy and an occasion where you drink with a group.'"

For each assignment Fraley prepared different templates in Revelation, each tailored to the specific occasion. The template allowed the participant to start by uploading a picture, and then answer a series of follow-on questions to tell the full story and background of the event.

"Revelation is the only software I know that that seems to have these templates, and I have the choice whether I want to share one person's responses with other participants or keep them one-to-one," Fraley says.

"The software is like ABC, it is so easy. It is user-friendly and presents you with all the building blocks. On the one hand there are all the instructional texts and the other hand are the responses. The real skill, when writing a template, is in how to create storytelling concepts - how you flow them through what you want to learn. You have to remember that the respondent cannot look quizzically at you when they don't understand, so the moderator has to be good at writing," she says.

When the projects are completed, Fraley will tend to do some initial queries on the data using the analytical capabilities within Revelation, but for more in-depth analysis, she finds it easy to export a transcript organized by individual or segment, and feed this into a coding program. "The tool is amazing because you can filter your data, and the order of the transcript follows the logical order of the template," she says.

"If you look at the overall value of this, the cost of using Revelation is very economical. Where the cost goes is the time it takes to read through and analyze the data. The upside and downside of this method is the sheer volume of data you get. While the data is richer and deeper, clients simply do not want to read all of the data."

To compensate for the lack of viewing-facility sessions, Fraley advises involving clients by assigning them specific participants to monitor and observe. Revelation allows you to create specific observer log-ins for clients. She recommends that the researcher provide frequent debriefs to the client by phone. She also cautions: "There may be a thousand or more pages of data from one of these studies, but the clients will still ask for their reports in the same amount of time!"

Easily fit

Revelation is only available as a Web-based hosted solution, running remotely on the provider's servers. Pricing is based on usage, with the unit cost being the participant day. Packages start at $1,000 for 75 participant days and subsequent access for 90 days for analysis time, or $1,500 for 150 participant days, with volume discounts available. This is not inexpensive, but compared to the cost of hiring a focus group facility, travel and hospitality, these charges should easily fit within most research budgets and leave some change.

It would be wrong to look at Revelation only as a means to save money, though that could be one welcome benefit of using the method, along with wear-and-tear on the qualitative researcher, who perhaps gets to travel a bit less. To me, the real benefit of this method is its ability to take qualitative data gathering from the artificial confines of the focus group into the realms of the ethnographer, by working directly within the participants' own fields of experience as they go about their daily lives. | Q

More online qual options

Enter article ID 20071209 at www.quirks.com/articles to read Tim Macer's take on two other online qualitative tools.

> online research

By Demitry Estrin and Ted Chen

More satisfying satisfaction research

Using interactive technology to improve online questionnaire design

Editor's note: Demitry Estrin and Ted Chen are senior vice presidents, satisfaction and loyalty research, at Angus Reid Strategies, New York. Estrin can be reached at 212-402-8205 or at demitry.estrin@angus-reid.com. Chen can be reached at 212-402-8201 or at ted.chen@angus-reid.com. To view this article online, enter article ID 20090704 at quirks.com/articles.

snapshot

Satisfaction research, along with its obvious role as an information-gathering vehicle, can also serve as an illustration of your firm's regard for its customers. Why not, the authors argue, use online-based technologies to make the experience as pleasant and interesting as possible for them?

Relatively recent advances in technology have elevated the quality of research and the insights that can be garnered via the online medium. Today we have unprecedented flexibility for engaging the respondent in an innovative and interactive way. Through our work with interactive rich-media technology we have discovered that we can stimulate more thoughtful responses and collect better-quality data while at the same time providing an engaging and enjoyable experience for the respondent.

These advances set the stage for redefining how we view satisfaction research and satisfaction questionnaire design in the online medium.

Gained traction

With its roots in the total quality movement of the 1980s, satisfaction measurement gained traction with management over the last three decades as a tool for soliciting feedback from customers regarding their experience and expectations.

Customer satisfaction is typically defined as a process or an outcome. The process definition of satisfaction speaks to the evaluative and psychological process of comparing prior expectations to actual experience with a product. The outcome definition focuses on satisfaction as an end-state of customer experience. In other words, the outcome definition treats satisfaction as the cognitive and emotional state that results from experiencing a given product.

In general, there is a well-established consensus that satisfaction is a measure of customer experience with a product or service given pre-purchase, pre-transaction expectations.

The explicit goal of collecting customer satisfaction feedback is to inform management on how customers perceive a service, product or delivery channel. The information is used to benchmark and track performance as well as to inform change and prioritize improvements.

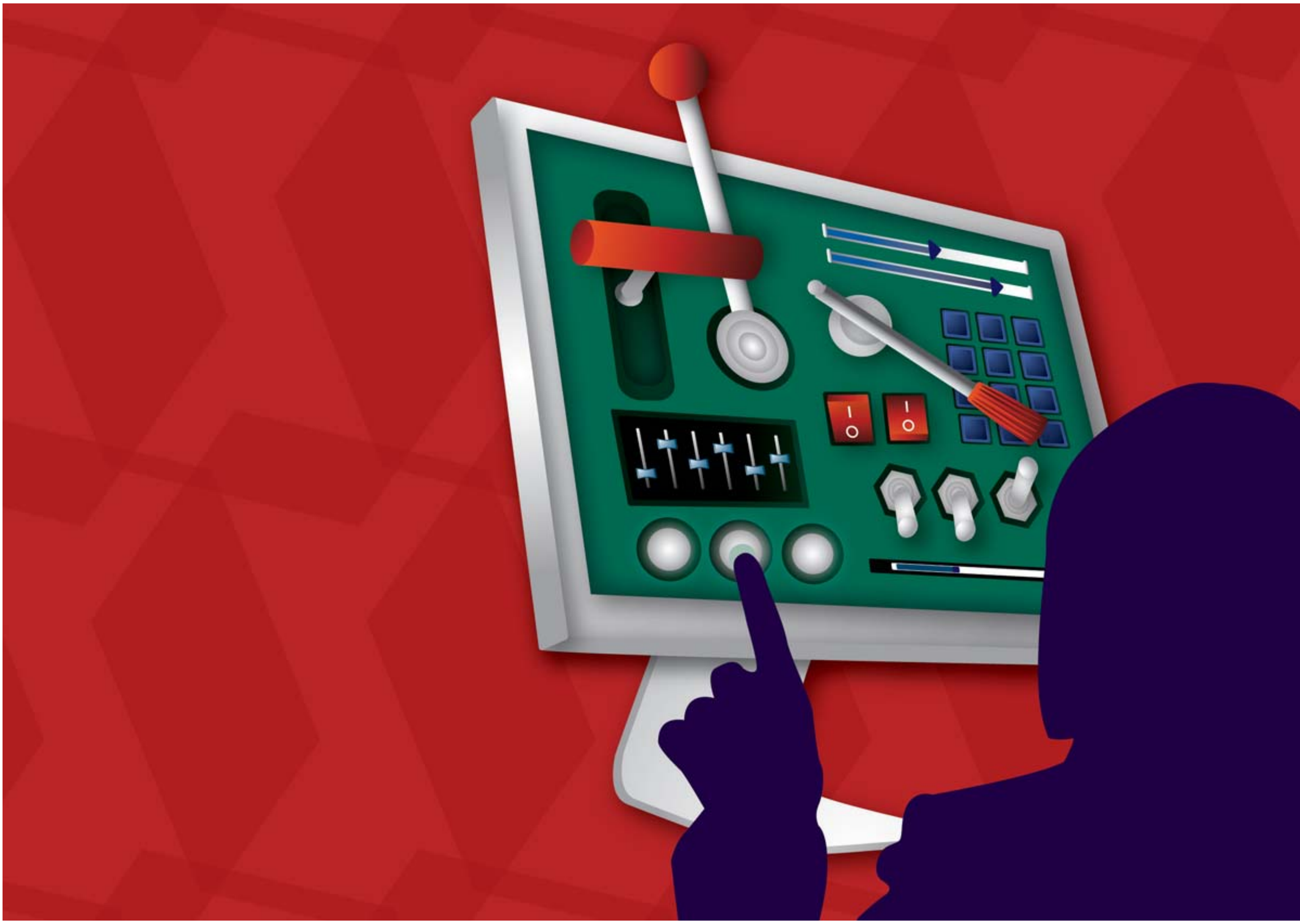
Communication is the implicit and often overlooked goal of client satisfaction initiatives. Each satisfaction survey can and should be a branded message to the client that the organization cares about its customers' experience and explicitly suggests that their feedback is valued.

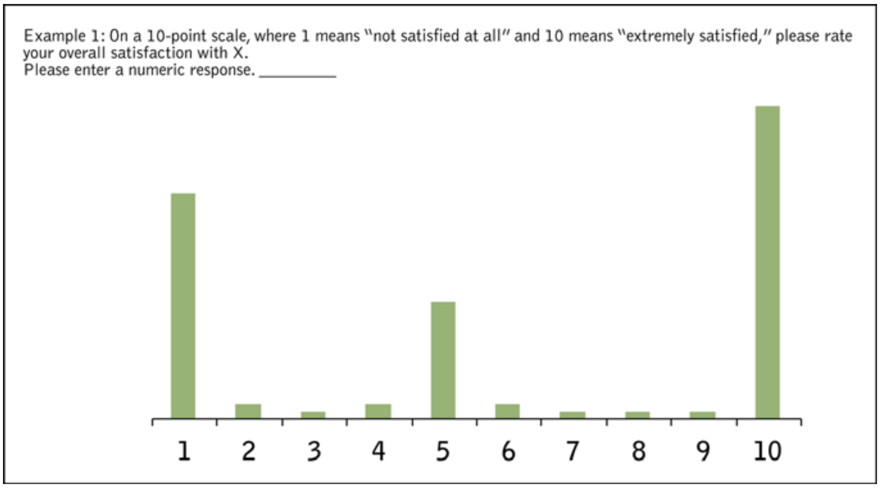
Given the information goals of satisfaction research, the survey vehicle design deserves careful attention and consideration. Achieving high data quality is the foremost objective in benchmarking and tracking satisfaction. A well-constructed questionnaire that yields thoughtful and meaningful responses sets the stage for a successful satisfaction initiative.

The challenge with satisfaction research is the need to measure perceptions across multiple service and product areas, which often necessitates a lengthy and repetitive questionnaire design. This by itself is a fairly significant impediment to collecting high-quality data, as the survey experience often demands a substantial investment in time and patience. For many respondents, this translates into a negative experience. Given the underlying communication goal of each satisfaction engagement, this is highly counterproductive and should be avoided at all cost.

Unfortunately most satisfaction surveys, even the good ones, have components that often result in a high percentage of break-offs or incompletes, year-over-year attrition (where a respondent is unlikely to fill out a satisfaction questionnaire after the initial survey experience) and ultimately lagging and perpetually decreasing participation rates. All of this impedes your ability to collect representative and reliable data. Given that one of the central objectives of most results-oriented satisfaction initiatives is to inform change by indentifying actionable improvement opportunities, reliability of your measurement over time is essential to ensure the ROI and ultimately the long-term viability of your satisfaction program.

In this article we will focus on three core components of satisfaction questionnaire design that impact the respondent experience





and the resulting quality of collected data. Specifically, we discuss questionnaire flow, the scale of the satisfaction metric and the visual presentation of the question for eliciting a more accurate response.

Often formulaic

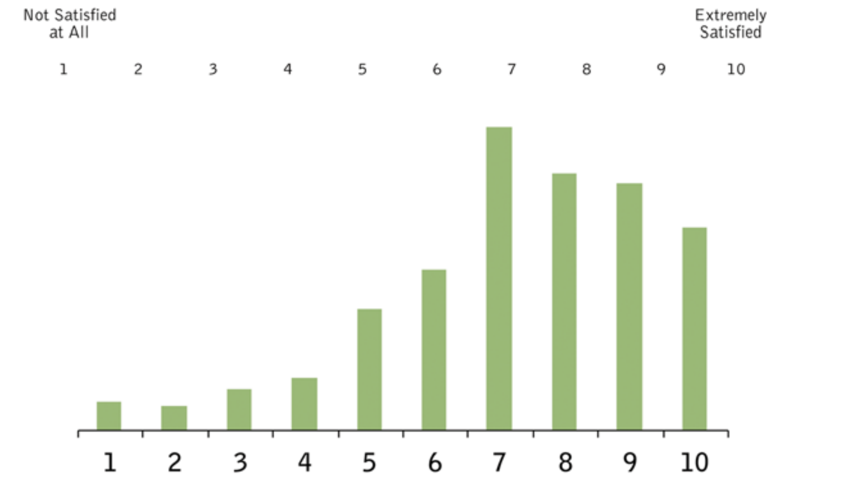
The design of satisfaction surveys is often formulaic. Questions about major aspects of service, also known as superordinates, gauge performance across overarching service categories such as product availability or execution. Superordinates are typically followed by a battery of more specific questions that measure performance across the components that define the overall experience with a specific superordinate. For instance, the overall satisfaction with a salesperson superordinate can be followed by a battery of attributes such as satisfaction with frequency of contact, product knowledge, responsiveness, etc. Typically there are also additional measures that get at the loyalty construct such as likelihood to recommend, first choice, likelihood to repurchase or likelihood to attrite.

The online medium allows us to break away from the rigidity of the traditional satisfaction survey vehicle. While we still want to gauge satisfaction across all of our service and product areas, we have the option of granting the respondent the flexibility to control what they see and when they see it. While good research design dictates that superordinates should precede attribute-level questions, the relative sequence of what areas we survey first is more subjective. At best, the questionnaire is structured to reflect the actual life cycle of the customer interaction with a company or a product. Usually, however, the sections are ordered by some subjective level of importance to the customer. Unfortunately this level of importance is determined a priori by the company and hence often reflects the hierarchy that the company considers to be valid.

For instance, the execution or salesperson section may precede the satisfaction back-office or documentation section. This subjective measure of importance in structuring our questionnaire may inadvertently impact our results. While product availability is of foremost importance to the customer, we may first ask them to fill out three sections that deal with everything from salesperson satisfaction to Web site satisfaction to satisfaction with overall execution. By the time the customer gets to the section that represents the most important component of his or her experience, they may be fatigued and may answer the questions through the lens of the previous sections that they were forced to review first.

Flexibility equals engagement and better quality data. By allowing the respondent to choose which section they fill out first, we are allowing them to personalize their survey experience. With more control the respondents are answering the questions more thoughtfully. Through their selected path the customers are giving us extra data points that help define how they

Example 2: On a 10-point scale, where 1 means "not satisfied at all" and 10 means "extremely satisfied," please rate your overall satisfaction with X.



perceive their interaction with the company, its service and its products. Our flexible design allows us to answer questions without explicitly asking them. For instance, is it product first and salesperson relationship second, or vice versa?

By granting more control to the respondent, we also reduce the perception of how long it takes to complete the survey, hence improving their overall experience with the process.

First points

When we think about satisfaction survey design, the satisfaction metric itself is one of the first points of consideration.

There are dozens of ways that you can ask the same simple satisfaction question. As researchers, we know that how we design and word the question will impact the responses that we receive. First there is a question of scale and second there is a question of how we display that scale.

When we think about scale we must remember the underlying premise of all satisfaction initiatives: the need to benchmark and track change. The simple truth is that by offering more points on the satisfaction scale we are allowing for more sensitivity to change. Of course another reason for using more points on our satisfaction scale is the fact that scales with at least seven points are more likely to generate normal response distributions. Given that we mostly use parametric tests for our analysis, a normal distribution is a definite plus. The authors prefer the traditional, anchored 10-point scale, where 1 represents "completely dissatisfied" and 10 represents "extremely satisfied."

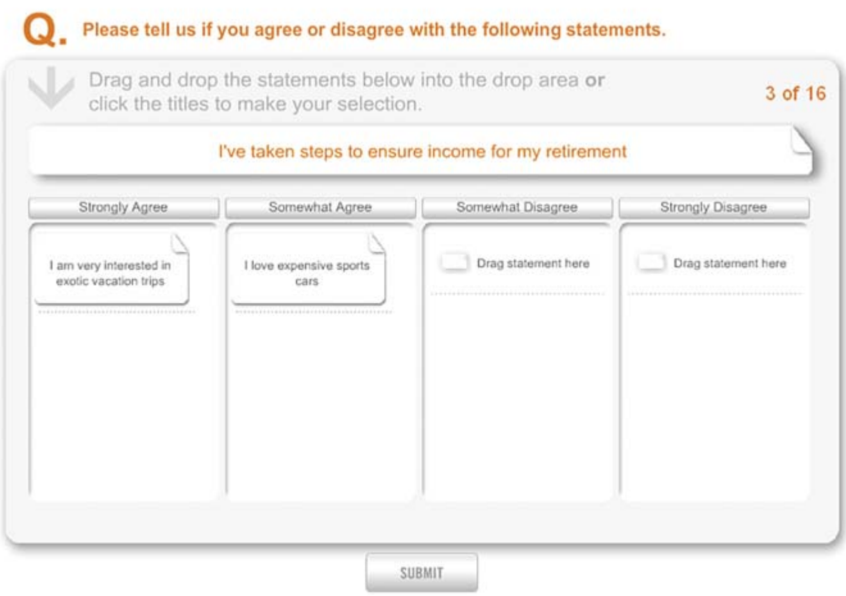
Having established that a scale

with more points is preferable for measuring satisfaction, it is important to note that the way we present this scale will often impact the distribution of our responses. Based on our research across both online and mail modalities, two different versions of the seemingly same overall satisfaction question, where both questions use a 10-point scale, yield very different response distributions.

As Examples 1 and 2 show, it is clear that full, horizontal depiction of the scale is preferable for achieving optimal distribution of responses. However, while a seven-to-10-point scale allows for more discrimination from the respondent, it also requires more effort and has the potential of making the survey experience more tedious.

Survey fatigue and subsequent indifference can result in a common problem of straightlining. This problem is not unique to satisfaction research. Typically this translates into neutral tendency, with the respondents consistently picking mid-points on the scale.

Figure 1

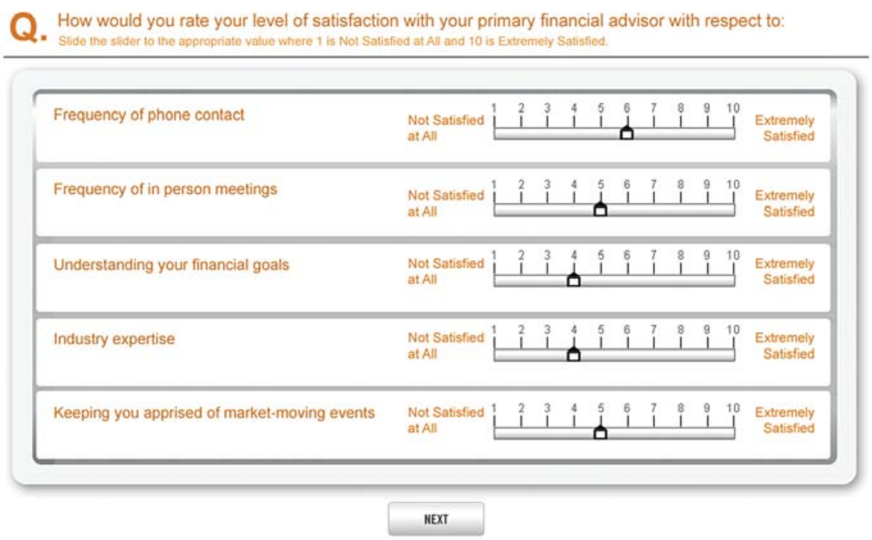


With satisfaction data, straightlining often takes on a positive skew as well, especially when customers are asked to rate a specific individual, such as their salesperson or advisor. This is a particularly painful phenomenon for the automotive industry, where survey gaming is often part of the status quo.

So how do we reconcile the needs and benefits of our satisfaction scales with the fatigue and straightlining that limits the reliability of our data? The answer is enhanced visual engagement.

In the online medium, we

Figure 2



have the unprecedented flexibility to redefine our customer's survey experience. We can step away from the flat, two-dimensional format to a visually-assisted interface.

While visual scales are not new, they have not been used extensively in survey research. To date, the biggest limitation has been the extra effort required to measure and record the answers provided. Recent advances in technology, however, allow us to liberate the respondent from the traditional survey interface.

Figure 1 is an example of how we can turn a traditional question into a fun and engaging exercise.

Our own research-on-research, which we presented at CASRO, shows that infusing online surveys with visual questions impacts respondent satisfaction with the survey process and their perception of the time it takes to complete a survey. To be more specific, respondents who complete a visual questionnaire feel that it takes them less time to go through the survey than those who complete the flat version of the same instrument.

We have also found and proven that visual questions impact the quality of the data that we can collect. In our test, visual questions resulted in broader use of the attitudinal scale than the flat version of the same survey. Visual questions tend to move respondents away from moderate positions to stronger positions, so that we are less likely to see neutral and "don't know"-types of responses.

Other researchers have also noted the positive benefits of the visually-assisted scales. Research conducted by Couper et al. examined the difference between traditional, radio-button scales and visually-assisted slider scales, where the respondent drags the slider to indicate agreement with a statement. Couper et al. found that visually-assisted sliders were significantly less likely to result in respondents using extreme values of the scale.

The higher response variability of the visual exercise may be explained by the drag-and-drop interaction that is embedded within each activity (Figure 2). The design of the question draws the eye and the respondent's attention to the statement, putting the scale into a different visual context. The respondent also has to put more thought into their response as they drag the slider from the start position to their designated level of satisfaction. In our view, this results in a more accurate representation of their true feelings and perceptions.

While visual scales may actually take longer to complete, as respondents dedicate more thought and action to answer each question, our research indicates that the perception of the entire experience is more positive than what we typically have with often endless and repetitive traditional satisfaction grids.

All of these findings support the notion that visually-assisted questions and scales reduce respondent fatigue as well as limit neutral tendency and positive skew. The result is a better experience for the respondent and better-quality data for the researcher.

Disengaging components

The validity and long-term viability of a satisfaction program often hinges on the quality of the questionnaire design. Even the best satisfaction surveys have disengaging components that result in poor-quality data, a higher number of dropouts and low participation rates. Given that satisfaction surveys are branded messages that communicate the values of your organization and the importance of your client relationships, you don't want customers to endure a questionnaire experience that elicits negative feelings.

Today's technology allows us to break away from the traditional survey design. Satisfaction research stands to benefit from these recent advances as we give respondents more control and more satisfaction from their survey experience.

Our approach and our research shows that you can achieve better-quality data with interactive visual design. You can now boost the power of your research, by creating a survey that truly reflects how much you value your customer relationships. | Q

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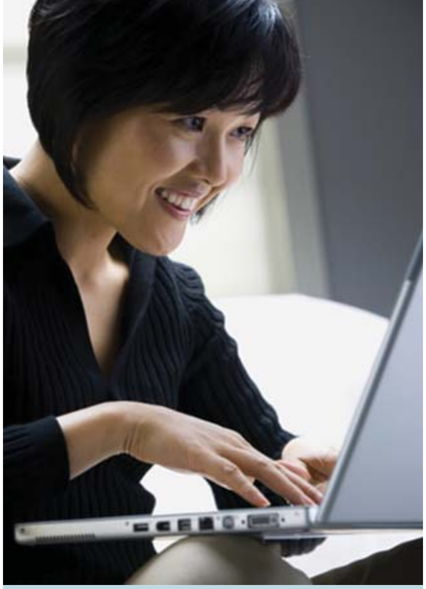
online research

No need for a woman's touch?

The impact of gender in e-mailed survey invitations



By Philip Derham

In the February 2007 *Quirk's* article "Does the survey sender's gender matter?" Stefan Althoff reported that when e-mail invitations to participate in some German industries' online surveys appeared to come from a woman, the response rates were better than when men had sent the invitations. He also noted that this difference had not been replicated in general-community online survey trials.

These initial German findings suggested two gender-related hypotheses which we subsequently tested in Australia. The first and obvious hypothesis was whether response rates from e-mailed invitations to participate in online surveys were higher when the e-mails are apparently from a woman.

The second hypothesis was that women answer online survey questions less openly than men, because of a lesser willingness to expose themselves in a more assertive Australian male culture.

If either hypothesis were valid in Australia, changes in marketing research practice would be needed for better data collection and strengthened online survey response rates.[1] Hence, it seemed appropriate to test the hypotheses to determine the impact, if any, of gender.

The summary findings are that in the Australian context, the gender of the e-mail invitation-sender does not influence the response rates achieved in online surveys, and in online surveys, women answer questions as openly as do men. Additional study is recommended, as there is room to test the hypotheses further among specific audiences and topics.

snapshot

In response to a similar exercise in Germany, the author fielded a test in Australia to see if prospective respondents would respond differently to an e-mailed survey invitation sent by a man versus one from a woman. While gender appears not to be a factor, some interesting findings arose from including location-specific information in the subject line.

Hypothesis 1: *Australians respond better to an e-mail invitation from a woman.*

On first view, the hypothesis that Australians would respond better to a woman's e-mail appears reasonable. Australian men can appear more threatening than women - we know that four in five Australian murders and four in five Australian assaults are undertaken by men, making men actually and apparently the more dangerous sex.[2]

Conversely, gender in e-mail invitations may be an irrelevance as the e-mail appears on a computer screen as gender-neutral text, and many spam-type e-mails purporting to be from one person are commonly thought to have been sent by someone else.

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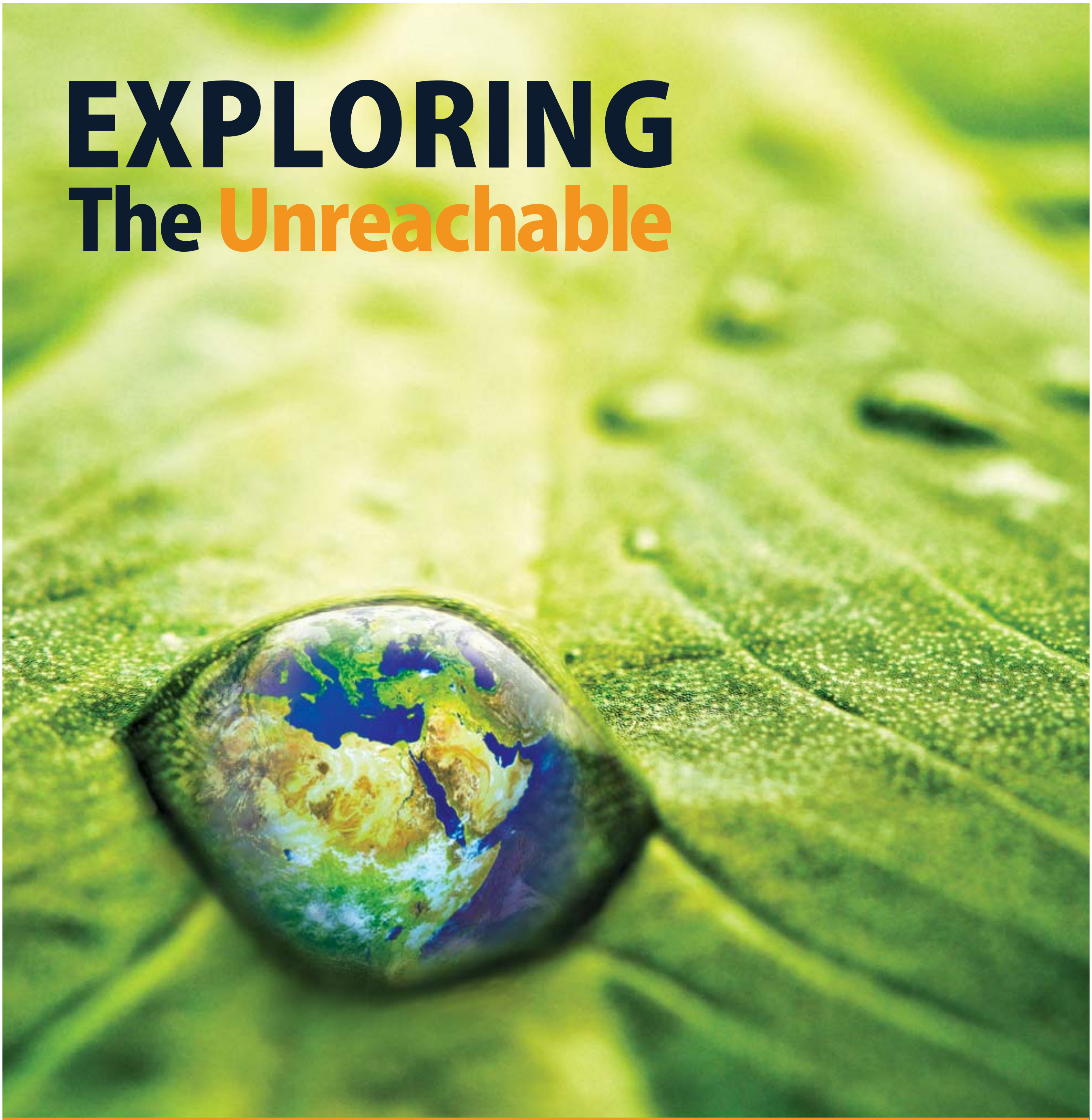
EXPLORING
The Unreachable

To test the hypothesis, we used clearly gender-different first names in e-mail invitations to participate in four test surveys conducted between October 2007 and June 2008. The first three surveys were of women invitees only and the fourth test survey was with a larger female and male universe.

In accordance with the Australian Market and Social Research Society's Code of Conduct, the e-mail addresses used were those of real people and the gender-identifying names used are, in the Australian culture, mainstream names.[3]

Table 1: Responses to a Female or to Male E-mail Sender, 2007-2008

Sample details	Survey 1 Oct. 2007	Survey 2 Dec. 2007	Survey 3 Jan. 2008
% survey response - female researcher	25%	20%	18%
% Survey response - male researcher	24%	19%	16%
Total response rate	25%	20%	19%*

* 2 percent of the total responses from Survey 3 could not be allocated to either sender as the respondents had used different response e-mail addresses than those in the database used to determine which sender the respondent had responded to.

Women-only surveys

The first three online surveys were of respective samples of 3,500 women, 3,600 women and 1,000 women aged 25 to 54 years, who were invited to participate in a shopping center café survey. Each woman received one personally-addressed e-mail invitation, had eight days to respond and was offered the opportunity to enter a competition to win one of 13 individual $A100 cash prizes.

It was expected that the only known element was a subject-line note that the e-mail was being sent to people who had completed a First Direct Solutions survey some time before receiving this survey invitation. (It was considered unlikely that the respondents would have heard of the research company or of the researchers before the invitation e-mail.)

Each sample was divided into state groups and each state's sample was divided on an A-K and L-Z basis so that in each state, half the sample received an e-mail from the named female researcher and the other half received an e-mail invitation from the named male researcher. To avoid any possible alphabetical order or state bias, the alphabetical order of sample e-mailed by the female researcher in the first survey was e-mailed by the male researcher in the second survey.

The first two surveys used different survey links so the identity and gender of the e-mail sender was clear. The third survey used one link and used the respondents' e-mail addresses to determine whether the female or the male researcher had invited the respondent to participate.

The gender of the e-mail senders was confirmed when the recipients opened or clicked on the invitation, as they were asked to advise the female or the male researcher, by name, that they had received the invitation.

The results were interesting. The first survey (undertaken in October 2007) had a one-in-four response rate, and the second and third surveys were undertaken shortly before or after the Christmas-New Year holiday season and had one-in-five response rates. The differences between the response rates from e-mails sent by either researcher were statistically insignificant, as Table 1 shows. Each survey's results were within standard error (2 percent and 3 percent for the first two surveys and 4 percent and 7 percent for the third survey, at the 95-percent confidence level).

Noticeably, the main influence on response rates appeared to be

Table 2: Responses to the Male or Female E-mail Sender, 2008

Survey	Sent by the male researcher	Sent by the female researcher	TOTAL	The male's % of total	The female's % of total
Net sent	10,812	11,088	21,900	49%	51%
Completed surveys	2,894	2,678	5,571	52%	48%
% response	27%	24%	25%	52%	48%

timing. Surveys dispatched within a month of the Christmas holiday periods (which, in Australia, began on December 25, 2007) had noticeably lower response rates than the survey invitations sent some months before. This is definitely an Australian cultural issue, as December is generally dedicated to finishing the year's business, school and social activities, to shopping for Christmas and preparing for holidays after Christmas. Then, until mid-to-late January, more are on vacation or in caretaker mode than at other times of the year.

Almost all respondents provided their e-mail addresses, as these were needed to enter the competitions to win one of the prizes. In survey one, 93 percent gave an e-mail address; in survey two, 96 percent; and in survey three, 89 percent. In the fourth (male and female universe) survey, 94 percent of women and 94 percent of male respondents provided their e-mail addresses to the male researcher and 91 percent of men and 94 percent of women gave their e-mail addresses to the female researcher.

These high e-mail address response levels indicate the respondents were unconcerned about providing their e-mail addresses to a male or to a female researcher, indicating little concern for the gender of the e-mail invitation to participate. Once the decision to participate in the survey had been made, the sender's gender appeared to be irrelevant.

A female and male sample

A fourth survey test was undertaken in June 2008 with people who lived near shopping centers. The net universe of 21,900 prospects was drawn from the First Direct Solutions panel previously used and a third of the sample were men (31 percent).

Each invitee was sent a one-time e-mail invitation and in this survey, the panel source was not indicated in the subject line. Instead, the subject line stated the e-mail was about a "Food Court Survey - with cash prizes draw!" The e-mails were again personally-addressed to each prospective respondent. (By title, first name, family name, home suburb, Australian state and post code and addressed to them as Dear Title and Family Name.) The e-mail letters were signed by either the female or the male

Table 3: Unsubscribe Responses and General Correspondence with Male or Female E-mail Senders, 2008

Shopping center customers survey	Sent by the male researcher	Sent by the female researcher	TOTAL	The male's % of total	The female's % of total
Net sent	10,812	11,088	21,900	49%	51%
Unsubscribe requests	186	205	390	47%	53%
Unsubscribes as a % of all sent	1.7%	1.8%	1.8%	47%	53%
Correspondence from respondents	31 e-mails	32 e-mails	63 e-mails	49%	51%
% of correspondence from respondents	0.3%	0.3%	0.3%	49%	51%

researcher, with the same e-mail and receipt details as before.

There was one unintended difference between the two samples in this fourth survey. For dispatch ease, both samples had been grouped by the recipients' home state and were sent out in mail-merged small batches of less than 2,000 e-mails per time. During the tedium of sending, as each batch was sent separately, the invitation line was inadvertently changed.

Three quarters of the invitations from the female researcher were sent with the planned "Food Court Survey - with cash prizes draw!" subject line but a quarter were sent with the residents' home state shown at the start and all the male researcher's invitations were sent with the home state (e.g., NSW or New South Wales) shown at the start - e.g., "NSW Food Court Survey - with cash prizes draw!"

This difference, rather than the sender's gender, seemed to affect the response rates between the two senders, as Table 2 shows.

The three-percentage-point difference in response is greater than the standard error would indicate (a one-percentage-point difference between the two would be expected). This difference appears to have been driven more by the state localization of the survey subject line as both the male and the female senders received almost identical numbers of unsubscribe requests and other e-mails from the people contacted, as the next section notes.

Larger universe

The shopping center customers' survey test had a larger universe of invitees and also had a larger number of responses than the earlier three surveys. The larger number was in surveys completed but also in the number of unsubscribe requests received and in e-mail correspondence from invitees.

The researchers responded to all unsubscribe requests, acknowledging that the request would be honored, and responded to all other e-mails with appropriate answers. In doing so, it seemed that more e-mails came from recipients of the female researcher's invitations and were often chattily addressed.

When analyzed, there was minimal difference between the researchers in unsubscribe requests received or in e-mail correspondence, as Table 3 shows.

This lack of gender difference in the shopping center survey unsubscribe or e-mail correspondence rates suggested we review these measures from the earlier surveys. As Table 4 shows, there was essentially no difference in unsubscribe or in the e-mail correspondence rates.

Not an influence

The responses to invitations from a male or from a female e-mail address indicate no online survey response rate differences with the samples tested. This then indicates the e-mail invitation sender's gender is not an influence in the decisions respondents make whether to complete online surveys - at least for these topics and with these samples.

The survey results suggest that e-mail invitations appear genderless as electronic text on electronic backgrounds on computer screens. Factors other than the sender's gender influence decisions to participate in a survey. In particular, the impact of inviting respondents to participate in a survey about their local (state) area seems to generate better responses and future testing will look to that as a way to strengthen response rates.

The further analyses of unsubscribe rates and of correspondence with the researchers also found no difference by the inviting e-mail sender's gender.

Hypothesis 2: *Women respond differently to men.*

In testing whether women answered differently to men, we looked for a question that would be commonly asked of both and would be independent of gender-related behavior. Bradburn's findings that respondents in self-completion surveys underreport answers to questions that make them feel uncomfortable[4] suggested such questions could be logical tests for gender differences.

As our previous online surveys had not asked which, if any, questions respondents were uncomfortable answering (the absence of this does suggest a possible future project!), the "What is your total annual household income?" question was considered likely to be an uncomfortable question. This was because clients often expressed concern that it was intrusive, and Australian face-to-face interviews often use pre-coded answer sheets that give a letter or number for each income range, so respondents need not state an actual dollar amount or range. The assumption was strengthened when we found that 15 percent of recent telephone respondents and 10 percent of recent mail survey respondents refused or did not answer when asked for their household income (based on findings from three recent Derham Marketing Research community and three customer audience telephone surveys, and four recent postal self-completion surveys).

Table 4: Responses to the Male or Female E-mail Sender, 2007-2008

Sample details	Survey 1 Oct. 2007	Survey 2 Dec. 2007	Survey 3 Jan. 2008
Unsubscribe rates – male researcher	1%	1%	1%
Unsubscribe rates – female researcher	1%	1%	1%
Correspondence rates – male researcher	0.4%	0.3%	0.4%
Correspondence rates – female researcher	0.1%	0.2%	0.2%

Responded differently

The online surveys analyzed for household income response differences all had optional household income questions. Answer places were shown but respondents could proceed to the next screen without answering (though respondents had not been told that). The results were analyzed by respondents' gender to see whether men and women responded differently to the presumed uncomfortable question about household incomes.

The first online survey results reviewed were from a sample of 6,420 Australian financial institution customers and the one-time e-mail invitations were sent from an unknown and gender-neutral e-mail address (the sender was derhamp@derhamresearch.com.au). The e-mail subject line said the e-mail was an invitation to participate in the financial institution's customer survey and participants could win a prize.

When the e-mails were opened or viewed in a reading panel, they were seen to be on the financial institution's letterhead and signed by the financial institution's male chief executive officer. When the readers moved their cursors to another e-mail or sought to close the e-mail, they were asked to acknowledge receipt of the e-mail to a male researcher.

The non-response to the household income question differed minimally between men and women. Only 3.7 percent of men and 4.1 percent of women chose not to answer the household income question - the difference of 0.4 percent was well within standard error (1.8 percent at the 95 percent confidence level). This study suggested gender had little influence on household income answers.

The second online survey was of 4,350 customers from another Australian financial institution but differed because a three-contacts approach was used[5] to generate response. The same e-mail dispatch and e-mail receipt procedures were used and again, the e-mail components were mostly from men.

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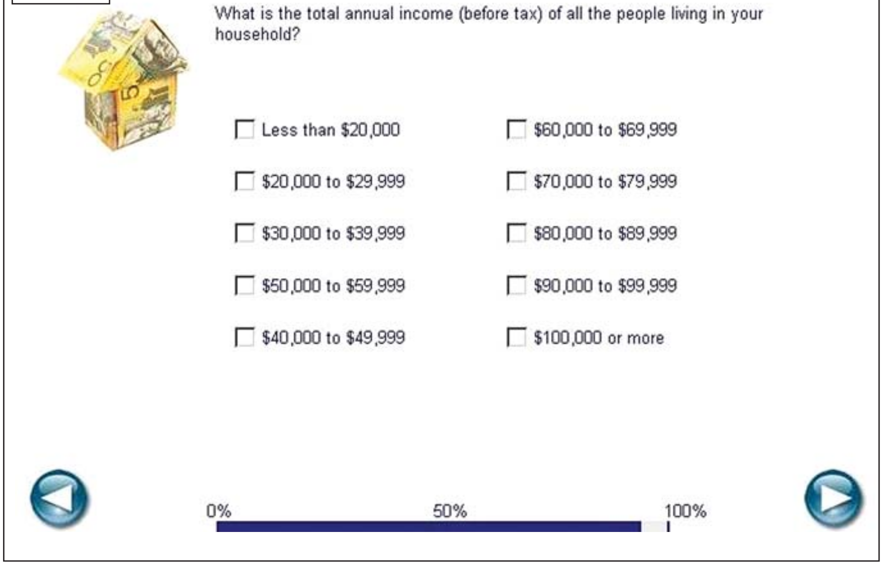
The non-response to the household income question in this second financial institution's sample differed markedly from that of the first study. In the second study, 32 percent of men but 40 percent of women chose not to answer the household income question – an 8 percent difference and a significant difference (the standard error was of up to 5 percent).

This second study suggests women and men do answer questions that may cause discomfort differently or the women surveyed may not have known their household incomes. The survey had not asked why the household income question was not answered.

Figure 1



The findings of the two small-sample studies were contradictory and thus inconclusive. The third study reviewed was of a large-scale survey. In that study, 20,000 Australians were invited to participate in an online survey.[6] The e-mailed survey invitation was sent from a gender-neutral and unknown-to-the-recipient e-mail address. The subject line said the e-mail was an online survey invitation, named the panel source (First Direct Solutions), and said there were potential prizes of cash, iPods and cinema tickets.

When the e-mail was opened or seen in a reading panel, the sender was identified as a male researcher and when the cursor was moved or the opened e-mail closed, the recipient was asked to acknowledge receipt to the male researcher.

In this larger survey, 0.2 percent of men and 0.4 percent of women chose not to answer the household income question. The 0.2 percent difference in response from women was well within the 1.7 percent standard error expected. This finding in itself begins to question conventional wisdom that the household income question is an uncomfortable question, when the assumption is made in relation to these online surveys, where the household income question is asked as the one question on its own screen, as was done on these surveys (Figure 1).

The fourth study reviewed was the June 2007 shopping center survey, with its male and female universe. In that survey, 4 percent of men and 5 percent of women did not answer the household income question when asked by the male researcher; and 4 percent of men and 6 percent of women did not answer when asked by the female researcher.

The two larger-universe survey findings suggest no gender difference on response to a possibly uncomfortable question. So the mostly similar (with one discordant) results from these four studies suggest gender is probably not a factor in not answering questions about household income.

Not to be valid

The first hypothesis – that Australians respond better to an e-mail invitation from a woman to participate in an online survey – was found to be not valid for the respondent groups tested. Rather, the survey results indicate other factors influence decisions to participate in a survey. In particular, the impact of inviting respondents to participate in a survey about their local (state) area seems to generate better responses and future testing will look to that as a way to strengthen response rates.

The further analyses of unsubscribe rates and of correspondence with the researchers also found no difference by the sender's gender.

The second hypothesis – that there are gender differences surrounding the answering of uncomfortable questions – was not substantiated. Rather, in general, men and women appear to answer uncomfortable questions in online surveys at the same level. In addition, the gender of the e-mail invitation sender was not a factor affecting the level of answer given.

Hence, the overall conclusion is that gender has no impact on online survey response rates or on the decision to answer uncomfortable questions among Australians. Other factors – time of year, localization, topic, and not-tested factors such as survey design – are more likely to influence the response rates and question answers.

Tested further

The conclusions drawn are based on Australian finance industry customers, women aged 25 to 54 years, shopping center customers (male or female) and on a general-population sample that was researched about financial affairs. Hence, it may be appropriate to test these findings in other industry sectors, about other topics and with senders from minority groups, to be sure of the conclusions reached.

A more promising area for immediate response improvement seems to be named geographic proximity. That will be tested further.

The findings reported in this article expressly relate to Australia and to the online survey method and we will look at the relevance of these findings to other research methods in the future and would welcome other researchers' findings on those and for other cultures. | Q

Notes

[1] The Australian Market and Social Research Society Professional Code of Conduct requires all contact be from a legitimate and real person. Having a male or a female sender of an online survey invitation would be, for most Australian marketing research companies, an easy matter to manage, as the professional and managerial elements of this sector are almost equally divided between males and females, according to government statistics.

[2] Criminal Courts, 2006-7. Australian Bureau of Statistics, January 28, 2008. Ref. 4513.0.

[3] To comply with the Australian Market and Social Research Society Code of Conduct, respondent contacts must be from identifiable, contactable and real people, so dummy names could not be used. The sender e-mail addresses used in all tests were sue.derham@derham-research.com.au (the female researcher) and philip.derham@derhamresearch.com.au (the male researcher), as in the Australian culture, Philip is a man's name and Sue a woman's name. As the researchers' names are mainstream, the findings relate to mainstream gender names, and may or may not also relate to the findings that could follow from the use of names associated with specific ethnic or religious groups. Further research on this may be advisable.

[4] "Question Threat and Response Bias." Norman M. Bradburn, Seymour Sudman, Ed Blair and Carol Stocking; *Public Opinion Quarterly*, 1978.

[5] The three contacts were a pre-survey notice that the survey would follow next week, the survey invitation and a "quick, the survey finishes shortly" reminder a day before the survey closed.

[6] The sample had been drawn in proportion to the population, by Australian state and by age groups within each state. Each sample had a 60 percent female component. The end sample matched the state, age and gender distributions of the original universe invited to participate.

Faster than a speeding survey

Part II: The physician's perspective

By Terri Maciolek
and Jeffrey Palish

snapshot

In the second part of a two-part series on online surveys with physicians, the authors explore doctors' reasons for participating in the research process and examine the factors that can lead to speeding and cheating.

Is it the driver or the car or both? In part one of this two-part series ("Faster than a speeding survey," *Quirk's*, June 2009), we provided a framework for market researchers to consider protecting online survey data integrity from "drivers" (i.e., respondents) who speed and take shortcuts. We suggested fundamental practices to minimize inclusion of questionable data: 1) validating a respondent's "license to drive;" and 2) implementing "road traps" (i.e., knowledge traps, speed traps, logic traps, attention traps) to catch those who appear to speed or take illegal shortcuts.

In this article, we delve into the drivers' (physicians') perspectives on online surveying. Why do some doctors have a lead foot? Do physician respondents need a refresher course on how to drive? Are the vehicles (survey instruments) to blame for the problems? What can we, as an industry, do to minimize reckless driving?

Good news

What is the driver's perspective? We queried over 400 physicians using depth interviews and online surveys. The good news from physicians (anecdotally confirmed with a spectrum of survey agencies) is that the incidence of known and intended speeding and cheating by validated physicians is fairly small (with guesstimates around 2-3 percent). Assuming that surveys sample from a reliable panel of verified physicians, it appears that the vast majority of physicians who start a survey do so with the intent to follow the rules of the road and to earn some gas money along the way. Even though financial incentives are key for survey participation among physicians, many also view online surveys as an opportunity to learn about new drugs and treatments as well as benchmark themselves against other clinicians (Figure 1). Indeed, when provided with a well-tuned car (survey) to drive, physicians actually enjoy completing online surveys that ask for their professional opinions and clinical behaviors and perspectives.

While good intentions abound to be safe and careful drivers, all physicians we queried admit that they are not always fully attentive when answering every online survey question. What happens during a survey that causes physicians to be less attentive? It appears that certain parameters of the survey itself affect a respondent's mindset before the

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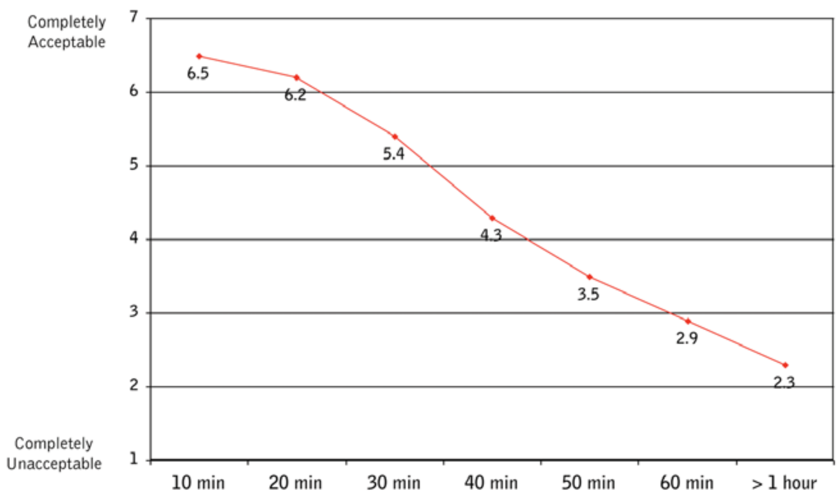
Figure 1: Why Physicians Participate In Online Surveys

	Reason	Primary Reason
Financial incentives	86%	51%
Learn about new drugs/treatments	73%	31%
Something fun to do	45%	8%
Learn what others are doing/thinking	39%	6%
A way to "give back"	25%	4%

(n=164)

Figure 2: Physicians' Perspective On Survey Length



(n=164)

actual survey begins. Survey length is a good example. Physicians indicate that when a survey takes longer to complete than promised, their attention span diminishes (and frustration levels rise). In fact, most indicate that they "sometimes" or "often" become inattentive or less thoughtful when completing an online survey when it takes longer to complete than promised. The result is diminished validity and reliability of the data.

How long is too long from a physician's perspective? Physicians suggest that about 30 minutes is reasonably acceptable (and shorter is even better), but surveys longer than 40 minutes not only jeopardize participation but attentiveness as well (see Figure 2). Physicians subjectively suggest that fatigue and inattentiveness set in around the 30-minute mark (and sometimes sooner).

Assume responsibility

But what else drives physicians to disengage and/or speed when completing an online survey? The bottom line is that we, as the car manufacturers, must assume responsibility to provide physicians with a vehicle that is well-tuned to perform at the level we expect and require.

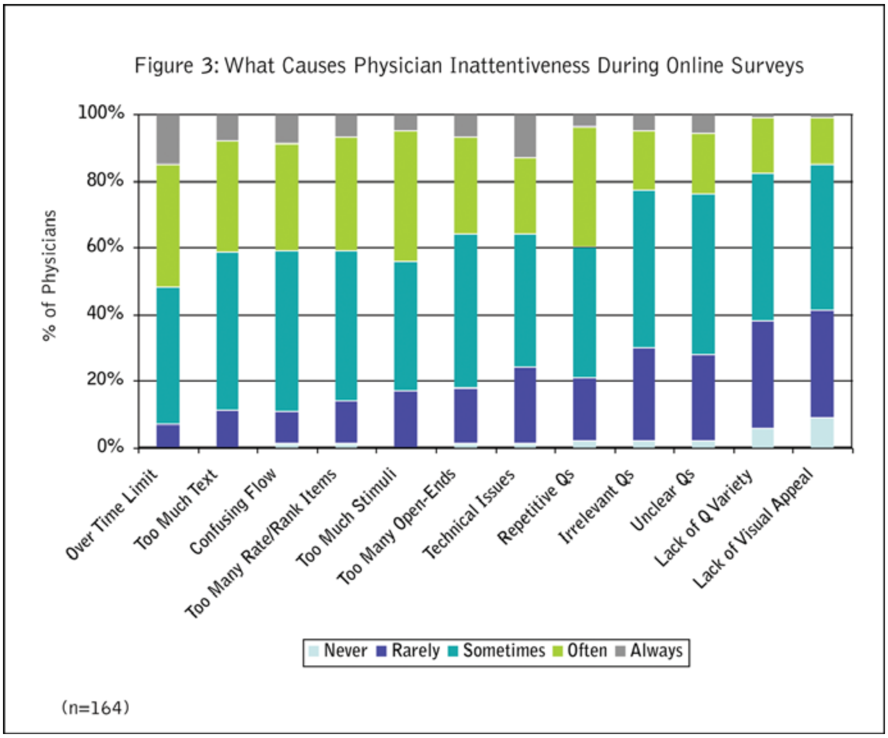
In other words, survey design is a critical factor. All physicians we interviewed during our investigation were quite clear that the quality of the survey drives generation of quality data. Like many of us, physicians are busy and constantly multitasking. Still, they take time to complete our online surveys and to carve out quiet time to do so (nearly 70 percent of physicians typically complete online surveys at home, where they contend they can concentrate and give the survey their complete attention). As physicians we interviewed spontaneously and collectively commented, "Physicians are great and deep thinkers . . . we're highly educated and intelligent . . . a survey that generates valid and reliable data respects that."

As conscientious market researchers, what must we strive for in constructing and fielding our online surveys to optimize the quality of data generated? Physicians suggest the following (see Figure 3):

- abide by the participation agreement (survey length, topic);
- ask questions and present stimuli that are clear, concise and relevant;
- construct a survey that has a clear and well-organized structure and flow;
- use a variety of questioning formats (multiple-choice, rating, ranking, open-ends, etc.);
- minimize technical issues (frozen screens, visuals that take "too long" to load);
- keep the survey visually pleasing.

More than two in five physicians surveyed indicate that they are "never" or only "rarely" inattentive in answering online survey questions because they are distracted or busy with other matters while trying to complete the questionnaire. Physicians consider the survey experience to be a partnership that should produce a win-win for both respondents and market researchers. In fact, more than 70 percent of physicians surveyed said that they would like to be able to comment (input free text) at the end of a survey as to the quality of the survey itself (what they liked or disliked about it, suggestions for improvement, etc.). Here are some comments physicians shared during the research we conducted for this article:

"The quality of the surveys varies greatly and feedback on this is an excellent way to improve the quality of the



survey. Quality in equals quality out."

"The more complex the survey, the less real data are obtained. It is like Windows Vista vs. Mac. Make surveys fun, entertaining and interactive."

"I personally tend to spend more time on surveys that are interesting and not lengthy, which allows me to think more and give better/more thought-through answers."

"I think a more effective way to get good answers to a survey is to make sure it is written well. Time is valuable and if you want doctors to spend the time then make it easy to answer questions accurately and quickly."

Generate quality data

In our two articles, we've explored dimensions of generating and maintaining data integrity in physician-answered online surveys. Much of what we have imparted is of the best practices ilk rather than a discussion of new tools, directions or strategies. High-quality and well-executed survey instruments generate quality data, and checks and balances along the way preserve data integrity. To quote Henry Ford, "A market is never saturated with a good product, but it is very quickly saturated with a bad one." | Q

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online research

Reducing risk

An examination of strategies for panel-blending

By Michael A. Fallig
and Derek Allen

Online sample for survey research can be sourced from a variety of providers, most offering samples from non-probability respondent pools. Resources include: consumer access panels with members who were recruited to take surveys; online communities that have members who earn points for engaging in a variety of activities, including taking surveys, but were never expressly recruited to take surveys; providers who have access to members who joined social communities and social network sites; site visitors who are willing to take surveys when an invitation is available; lists, databases, Web site intercepts, blogs and other resources.

Many online research programs could benefit from drawing project sample from several online respondent pools rather than just one. If done properly, sample from multiple pools can:

- broaden coverage of the characteristics of the population at large;
- meet the needs of studies with unusually demanding characteristics (particularly continuous tracking studies and market-level studies):
  -- extremely low incidence of eligibility
  -- large sample size requirements
  -- very localized geographic requirements
  -- lengthy past participation or study lockout requirements
- reduce risk of reporting or using an out-of-range response measure estimate for important decision-making.

The intrinsic and extrinsic differences that define who we are as individuals are considerably more plentiful in variety and number than the handful of demographics that some sample providers try to manage via sample deployment distributions, quotas or weighting. These individual differences may sometimes be more strongly associated with key response measures than demographics. In such cases, if each non-probability respondent pool was comprised of a different mix of personal characteristics, then it would stand to reason that each pool would report a different response measure distribution.

We hypothesize that the mixtures of personal characteristics within each non-probability respondent pool will be different, in part because of the disparity in the methods used by respondent-pool providers for attracting, recruiting, engaging, maintaining, incentivizing and replacing members and visitors. Each provider's set of methods may appeal to, keep

snapshot

This article offers a report on a research-on-research project which sought to measure the effects of respondents' various personality traits on their participation in online research.

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engaged and tenured, qualitatively different mixtures of people.

Furthermore, each community and "river" content site provides its own unique experience to its members or visitors, including its own mix of subject matter, activities, membership interaction opportunities; and the number, frequency and type of surveys its members and visitors participate in, etc. Therefore, even if providers were able to attract or recruit the same types of people initially, these pools would become qualitatively different over time as each pool obtains more and more unique exposure experiences as members and site visitors interact with and build tenure with the communities and content sites they frequent.

Constellations of characteristics

Because most online respondent pools are not probability samples of either the adult U.S. population or the adult Internet population, no single respondent pool is expected to reflect the U.S. or U.S. Internet population at large. Some pools may be light on certain constellations of these characteristics (which we will outline below), such as being open to change, and heavier than the population at large on others, such as being interested in volunteering.

We hypothesize that these differences, intrinsic and extrinsic in nature, contribute importantly to the differences observed in some response-measure distributions observed across samples from different respondent pools. These response-measure differences remain after fraudulent respondents, satisficers and the like have been removed from each sample and the remaining members are balanced on key demographics.

A challenge

Creating a recipe for properly drawing sample from multiple resources is a challenge that anyone interested in blending is faced with today. Some have taken an arbitrary approach, fixing the percentage contribution of each resource. However, we are not aware of any scientific approach for determining the proper blend of resources.

Because it is not easy to predict when a particular non-probability finite respondent pool will return an out-of-range result, GfK has been working on a solution to increase the comfort level with using these pools. Our approach does not focus on blending resources per se but on the following broad premises:

1. Attraction, recruitment, engagement, incentive, replacement and community or content site characteristics play roles in the type of people who are attracted to, sign up with, maintain membership/affinity with, or repeatedly visit survey and social communities and content sites.
2. As a function of the variety of approaches and offerings of providers, communities and content sites recruit and maintain people who differ intrinsically and extrinsically.
   -- Extrinsic characteristics that

are likely to be related to survey responses are also likely to be less universally exhibited across the population at large, and are not always easy to identify or control: panel tenure, survey participation, Internet activities and so on.
-- Intrinsic characteristics of importance are stable and more easily controlled or accounted for: personality traits, values, locus of control, need for cognition and functional attitudes.

3. These same internal characteristics appear related to issues such as:
-- Willingness to volunteer, donate or comply with a request such as join a community, take a survey, etc.
-- Breadth of online and offline activities people engage in including the time they spend online.
4. A major source of situational extrinsic differences is a function of the community and site activities that members and visitors engage in - and the surveys that they participate in and the subject matter they commit to long-term memory.
5. Given the assumed properties of the intrinsic and extrinsic characteristics, a prudent strategy may include controlling the distribution of important intrinsic characteristics sampled while randomizing as best as possible the myriad of extrinsic characteristics that could impact results (by randomly selecting people from a number of diverse respondent pools).
6. Online respondent pools are comprised of several different latent classes of people. Each class is identifiable by a set of intrinsic characteristics in addition to demographics:
-- online respondent pools will consist of the same set of latent classes;
-- the size of each class and the distribution of the classes within each respondent pool are likely to be different.
7. Non-probability online samples can benefit by calibrating the latent class sizes to the size of the classes found within the Internet population at large as measured using an instrument administered offline to a gold standard probability sample (e.g., area probability sample, ABS, etc.).

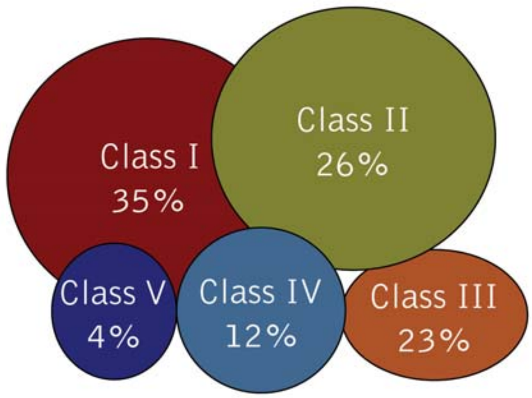
Enhance the quality

Today, many sample providers, service bureaus and full-service research firms are engaging in procedures to enhance the quality of their online respondent pools and/or study samples. The current efforts appear focused on eliminating frauds, duplicates, satisficers and the like. An underlying assumption is that with these issues eliminated, differences across online samples will be reduced and response patterns will be more believable.

We do not believe that the current focus diminishes the myriad of individual differences found among members of a respondent pool and across different pools of respondents. We believe that these individual differences need to either be carefully controlled or randomly distributed within each sample that is drawn.

Individual differences can be

Figure 1: Latent Class Regression Results



characterized as intrinsic or extrinsic in nature. Among intrinsic differences, we include personality characteristics, values, locus of control, demographics and other long-lasting and stable personal characteristics. Extrinsic differences include panel tenure, number of surveys people have taken, frequency of dining out, attending a ballgame, visiting the theater, blogging, shopping habits, number of hours spent online, among other things.

We hypothesize those providers' differences in how they attract, recruit, maintain, engage, incentivize and replace their respondent pools play roles in why respondent pools are different from each other. Considering that strategies are also used for maintaining affinity with social community members and visitors to content provider "river" sites, survey respondents obtained from all these resources are likely to develop their own distributions of individual characteristics.

We further hypothesize that the distribution of intrinsic and extrinsic individual differences in respondent pools are not the same and contribute to the response measure differences observed across online respondent pools even after resources are equated on standard demographics by weighting or balancing.

We have also assumed that a finite number of important intrinsic factors exist that are important to control but there are far too many extrinsic factors to identify or control. Consequently, extrinsic factors should be randomized as best as possible. If randomization is not feasible, then their influence should be reduced by drawing sample from a variety of respondent pools.

Considered to be universal

In developing our model, we took care to examine intrinsic personal characteristics that we considered to be universal across cultures and countries and relatively stable. We also took care to stay away from developing a model that would optimize on a specific response measure, such as purchase propensity. It was felt that such an approach would reduce the ability to use the model across all types of online studies. However, if the goal is to optimize sampling for a specific area, such as election polling, then consider a different dependent variable and mix of independent variables.

Research has been sparse with regard to the exploration of individuals' intrinsic characteristics and their association with survey participation, consumer panel membership, Internet use and the like.

Research regarding compliance with requests, altruism, volunteering and other pro-social and helpful behaviors reveals a positive association with certain personality traits and dimensions. For example, agreeableness, openness and extraversion - Costa, McCrae, Dye (1991); Jang and Livesley (1996); Bekkers (2004); Glendon, McKenna, Clarke (2006) - are found to be related to volunteering and other pro-social behaviors, including volunteering to take surveys.

Studies examining the relationship between personality traits (Big Five Inventory) and personal values (Schwartz Values Survey) reveal robust associations among clusters of values and specific personality traits. For example, agreeableness appears to be associated with traditional values and openness with universalism (Roccas, Sagiv, Schwartz and Knafo, 2002). The connection between personal attitudes and values has also been explored as attitudes often emerge by means of cognition from personal core values.

An extensive review of the literature was conducted to investigate intrinsic, extrinsic and motivational factors that were related to the following areas of concern:

- Internet usage and Internet activities;
- willingness, compliance and reluctance to participate in surveys and in research;
- attitudes toward surveys and taking surveys;
- motivations for joining online panels, social and virtual communities;
- motives for participating in online surveys and as an active member of an online social community;
- volunteerism; and
- decision-making (e.g., shopping, purchasing, political, etc.).

After careful consideration, GfK included the following measures in its intrinsic model as independent variables:

Big Five personality traits (BFI)
The Big Five Inventory is based on the works of Cattell (1943), Norman (1967) and Goldberg (1990). The 44-item battery yields five personality factors: neuroticism, openness to experience, extraversion, agreeableness and conscientiousness.

Portrait Value Questionnaire (PVQ)
The PVQ, developed by Shalom Schwartz (2001) and based on value theory, measures 10 basic overarch-

Figure 2: Aggregate versus Five Unique Class Models

	Aggregate	Class I	Class II	Class III	Class IV	Class V
PVQ Conformity						
PVQ Traditional						
PVQ Benevolence				▬▬▬▬	▬▬▬▬	▬▬▬▬
PVQ Universalism	▬▬▬▬			▬▬▬▬	▬▬▬▬	
PVQ Self-Direction		▬▬▬▬	▬▬▬▬	▬▬▬▬		
PVQ Stimulation		▬▬▬▬		▬▬▬▬		
PVQ Hedonism	▬▬▬▬	▬▬▬▬				
PVQ Achievement	▬▬▬▬		▬▬▬▬			▬▬▬▬
PVQ Power						
PVQ Security		▬▬▬▬			▬▬▬▬	
Need for Cognition						
Influentials Scale	▬▬▬▬			▬▬▬▬		▬▬▬▬
Locus of Control			▬▬▬▬			
Extraversion						
Agreeableness						
Conscientiousness	▬▬▬▬					
Neuroticism						
Openness	▬▬▬▬					
R^2	10%	34%	20%	45%	85%	44%

ing values: conformity, tradition, benevolence, universalism, self-direction, stimulation, achievement, power, security and hedonism.

Need for Cognition Scale (NCS)
The 18-item Need for Cognition Scale was developed by Cacioppo, Petty and Kao (1984), and measures individual preferences and tendencies to engage in complex thought, by exploring the motivational aspects of information processing.

Consumer Locus of Control Scale (CLOC)
The Consumer Locus of Control Scale developed by Busseri, Lefcourt and Kerton (1998) is based on social learning theory. The 14 items measure perceived level of control (internal or external) over the outcome of consumer events.

The Functional Attitude Scale (FAS)
The Functional Attitude Scale used by GfK was adapted from work by Daugherty, Lee, Gangadharbatla, Kim and Outhavong (2005) and Katz's early functional theory (1960). Attitudes serve one or more of four distinct personality functions: utilitarian, knowledge, ego-defensive and value-expressive.

The Influentials PS Scale (PS)
The Influentials PS (Personality Strength) Scale was developed by

Figure 3: Distribution of Classes by Community

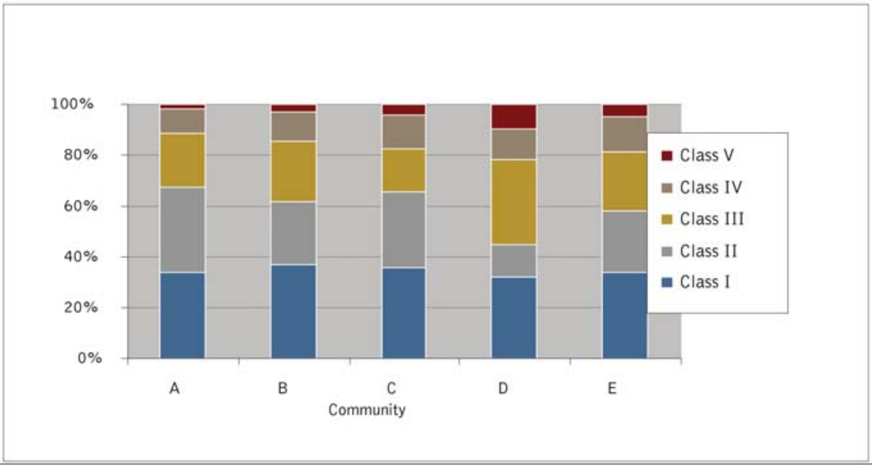


Figure 4: Classes Across Key Demographics

	Class I	Class II	Class III	Class IV	Class V
Percent Female	52%	53%	50%	55%	39%
Income > 100K	14	13	16	15	12
College Grad +	38	33	33	35	33
Age >55	17	25	10	18	6
Married	59	64	52	62	48
Own Home	59	68	53	60	45

Weimann (1991) and based on Katz and Lazarsfeld's (1955) two-step flow theory of communication, which asserted that consumers may be more influenced by each other than through media messages. The 10-item battery subsumes three latent dimensions: self-confidence, commitment and leadership.

Our dependent measure was created by multiplying the number of different activities that a person did online or on a wireless device (other than a phone call) by the number of hours spent on online for their own personal reasons, regardless of how or where they accessed the Internet.

Research design

Sample

A deliberate effort was made to select a diverse set of online respondent resources for the study. It was assumed that the diversity would yield the differing distributions of underlying latent class structure.

Source A: Traditional online survey access panel. There is no pay-for-play unless a specific survey length is met or exceeded. Monthly drawings are used to award incentives.

Source B: Survey access panel that mainly uses a referral model to recruit panelists. Incentives, to some extent, are associated with the recruitment referral model as members can earn rewards if referred members join and participate in surveys.

Source C: Members are recruited to earn points for doing a range of activities, including survey participation.

Source D: Social networks: these people joined their respective social networks for their own reasons, not for participating in survey research.

Source E: Portal and other sites that the source has relationships with offer site visitors the opportunity to participate in surveys and earn rewards for doing so.

Approximately 3,600 participants who completed the 35-minute survey were used in this research and analysis.

Results

Latent class regression was used to reveal five underlying classes of consumers. Each unique segment was distinguished by a different Internet usage driver profile. That is, the dependent measure (online engagement) was a function of a different set of personality metrics for each of the five segments. Figure 1 presents the overall model results. Class I represented 35 percent of the sample whereas the smallest segment (Class V) was comprised of just 4 percent of the respondents.

Figure 2 presents the complete model. As shown, many of the PVQ variables emerge as significant predictors of online engagement. Locus of control emerged as a significant negative predictor in Class II, indicating these respondents perceive an internal locus consistent with their self-direction and achievement drivers.

Two predictor variables - benevolence and self-direction - were present in three classes, suggesting they play an instrumental role in online engagement for a large portion of the Internet population. This is particularly true for self-direction, which is a driver for each of the three largest segments.

As expected, the five online communities included in this study differed considerably with respect to their class compositions, as shown in Figure 3. For example, Panel D (social network) had the largest concentrations of Class III and V respondents whereas Panel B (referral model) and Panel C (points-based) reflected the largest proportions of Class I consumers.

The Panel C (points-based) and Panel E (reward-based) class distributions appeared quite parallel - as one would expect. Similarly, the two more traditional online panel communities (A and B) also emerged as very similar.

Critical question

Now, the critical question is: what types of consumers characterize these

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Figure 5: Classes Across Past 30-Day Purchase Incidence

	Class I	Class II	Class III	Class IV	Class V
Clothes/shoes	52%	42%	57%	59%	51%
Laptop	4	2	7	3	8
Cell Phone	6	5	10	6	16
iPhone	1	0	4	2	5
Television	2	2	4	5	10
New Car	3	3	2	5	4
Television	2	2	4	5	10

Figure 6: Past 30-Day Activities

	Class I	Class II	Class II	Class IV	Class V
Read offline newspaper	54	56	50	60	56
Read offline magazine	55	48	58	54	47
Attended sporting event	13	10	18	10	10
Played with pet	57	52	56	55	51
Fast food	66	57	72	70	74
Disco/club/karaoke	7	6	12	8	12
Went to movies	11	11	17	6	25
Computer games	41	34	57	36	58

Figure 7: Consumer Attitudes

	Class I	Class II	Class II	Class IV	Class V
I enjoy shopping	7	11	5	9	6
I always buy the best	9	9	6	6	7
My HH is on a tight budget	5	5	7	7	13
I often buy on impulse	13	14	13	16	12
It is important to fit in	12	13	16	23	8

five latent classes?

From a demographic perspective the five classes differed in interesting ways, as shown in Figure 4. Other than Class V there were no substantive gender skews. Class II consumers appeared to be older, more apt to be married and own their own home. The youngest and oldest groups were clearly Class II and Class V, respectively.

Figure 5 provides a highly-abbreviated snapshot of the past 30-day purchase incidence data. The ranges on these data tend to be relatively wide. Apparel and shoe purchases ranged from a low of 42 percent to a high of 59 percent. In contrast, past 30-day cell phone purchase ranged from 5 percent to 16 percent.

In terms of the types of activities members of the five segments have engaged in over the past 30 days (Figure 6), it's clear that the very tech-oriented Class V consumers tend to avoid traditional periodical formats (offline magazines) and are more oriented to movies and computer games. Conversely, Class II members appear more traditional, tending to eschew fast food and computer games. Note that Class III consumers closely parallel many of the proclivities of the younger, ostensibly more tech-savvy Class V members.

Figure 7 reveals several noteworthy differences in consumer attitudes. For example, the spendthrift Class V members concede they are on a tight budget. Class IV consumers could be attractive to certain marketers as they appear to be more impulsive and driven by a need for conformity.

A comprehensive analysis of the latent class regression segments is ongoing. The segment profiling phase has revealed many interesting and intuitively-appealing patterns. These brief snapshots confirm that:

Class I members are clearly most affluent and well-educated and their external locus of control may lead to more Web-based information-gathering.

Class II members are older and reported the most online survey activity yet the lowest incidence of purchasing many products.

Class III consumers were also more affluent and notable due to their high levels of benevolence, agreeableness and openness. They also tend to shadow Class V members with respect to certain behaviors.

The most politically conservative group (recall these data were collected right before the fall 2008 election) was Class IV. These consumers scored highest on the conformity and traditional PVQ scales. This was the only group to vote overwhelmingly for McCain.

Finally, Class V members were the youngest and most tech-savvy. They were also the most self-directed with hedonistic tendencies.

Extensions will be explored

We believe this research represents a proof of concept in many ways. Our intent is to administer the full instrument to a large offline sample in order to develop a national model which will subsequently be used to classify 10 or more online communities. Based on this exercise, several extensions will be explored including: panelist survival models and intervention strategies for each class; an a priori classification/recruitment model; unique acquisition and retention

strategies for each class; global extension to European markets.

We believe these enhancements to the foundational market structure analysis will yield a comprehensive approach to online sampling that will minimize the impact of each community's idiosyncratic member acquisition and retention strategies. The benefit clearly involves greater stability and robustness. | Q

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customer satisfaction

Satisfying no longer

Satisfaction research needs to return to focusing on the customer

By Dennis Murphy
and Chris Goodwin

This is the first installment of a three-part look at customer satisfaction. Part two, in the August issue, will focus on the expectations we should establish for customer satisfaction. Part three, in October, will examine ways to execute a revamped strategy.

Obituary

February 29, 2011

With little notice and less fanfare, the discipline of Customer Satisfaction was laid to rest today. Known as CSat by friend and foe alike, mourners expressed more relief than regret at CSat's passing.

Nonetheless there is some cause for melancholy. CSat's era had begun mid-twentieth century with high hopes and a simple promise: to assist organizations in better pleasing their customers. Had CSat remained true to this course, perhaps today he would be alive, healthy and celebrated.

CSat entered the world as bright-eyed and aspirational as any discipline yet departed without fanfare. What were his sins? What paths misleading? What theories vapid? What applications misguided? Were there associate villains? Who? Are we dealing with evil or stupidity? (Frankly, does it matter?) A journey through the troubled times and perilous pitfalls of CSat can't help but be illuminating for whomever walks in his fading footsteps.

Fellow discipline Brand Tracking's eulogy summed it up all too well.

"Never has a market intelligence discipline been so warmly welcomed. After all, the notion that pleasing customers is a good business practice hardly evoked controversy. None of us ever questioned CSat's intentions. If only his passion for enabling greater customer satisfaction could have extended to the execution of customer satisfaction work, how different things might have been. But miscues upon misconceptions, failed promises upon false expectations, and delusion upon illusion clouded his last days."

snapshot

In part one of a three-part series, the authors outline how satisfaction measurement has gone wrong. What started as a well-intentioned, customer-focused endeavor has in many instances become an exercise that is more concerned with, and subject to corruption by, corporate needs.

While the above obituary may be tongue-in-cheek, the premise is not. Customer satisfaction has outlived its usefulness - at least in its current incarnation. That's a shame, given its profoundly valuable charter "to identify and resolve customer issues." Born to replace the "squeaky wheel" approach to solving customer problems, CSat promised a more disciplined process for managing customer issues. If that had remained its focus, this

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article would not have been written. Instead, CSat moved quickly beyond its initial charter into areas and in ways that not only proved ineffective, but also undermined CSat's ability to deliver on its core promise.

Small leap

The problems began with a small leap: from managing customer issues to enhanced analysis (i.e., understanding what the most common customer problems were). But that leap was made without first thinking all the way through the issues and consequences of that enhanced analysis. Sadly, the evolution of customer satisfaction became a devolution through these stages: insubstantial theory; haphazard execution; measurement confiscation; inappropriate application.

Insubstantial theory: *Good answer seeking right question?*

The advent of customer satisfaction as a fresh source of analytic information for organizations happened naturally and logically. Who wouldn't want to explore this new resource? The indications today are, however, that early advocates weren't pursuing tough questions about the concept itself. Here are some questions they should have been focusing on.

Can customer satisfaction drive market performance? At the very core of CSat, an unresolved foundational issue remains: can an attitude (satisfaction) powerfully and measurably drive behavior (sales)? For starters:

Who? We bequeath a kind of universal respect to CSat which it sometimes deserves and at other times is rather questionable. What good is it doing me if my least-profitable customers are delivering my prime satisfaction scores? Is satisfaction a useful metric in arenas where the customer has little or no choice latitude?

What? From inception, customer satisfaction has suffered not from too few measures but from too many. Unable to determine that any one measure better predicts – or even predicts at all – market performance, we've been accosted by a battery of measures: overall satisfaction, recommendation or repurchase, to mention a few. When frustrated by the individual queries we then create all kinds of composites like the venerable 3M algorithm which sums all three, yet still rests upon correlation where causality is begged.

The issues addressed, as well as those implied, have few simple answers. One initial assumption, however, was so fundamental that it never even reached question status – but will now:

Does a rising score alone imply rising performance? A basic tenet of customer satisfaction from inception has been "bigger is better." More often than not, however, measures are self-referential (our score this year versus our score last year) and the only thing that matters is generating an annual increase. So consider: "Company X gave you a seven last year and an eight this year. That's good, right? Not if your primary competitor advanced from a six to a nine!"

A competitive context is requisite for truly assessing customer satisfaction. Unfortunately, it's not a trivial assignment. Being difficult, however, does not obviate the fact that it's necessary.

Scientific process generally poses a question and then gathers data. Customer satisfaction was not born of theory but spawned from a data resource. It's little wonder then that a nomadic discipline ensued.

Haphazard execution: *More rigor or rigor mortis?*

Because customer satisfaction was so readily accepted – its face validity was practically unquestioned – the usual thorough effort of exploring methodological issues often happened after the fact, if at all. Here are some of the key questions that often were glanced over:

Questionnaire design. How much does the exact wording of the question matter? What is the proper scale? How should that scale be developed? What questions should be added? Does the questionnaire length matter? Does placement in the questionnaire matter?

Driver analysis. How do we determine what the drivers are? Is it derived, self-explicated and/or correlated with variables internal or external to the CSat study?

Comparative analysis. How do we compare responses from choosers of different brands? What do we do about the different types or segments of choosers of other brands?

We must consider how we design CSat questionnaires. Is CSat a serious discipline with a rigorous methodology or just a popular measure whose effectiveness changes with the whim of the question writers and survey designers? We've all seen how subtle wording changes can affect the outcome of a question. Questionnaire placement also matters. Cases-in-point:

We recently conducted a client's ongoing tracking survey and its annual customer satisfaction study. Using the same sample and executing the survey at almost the same time, we received higher satisfaction scores in the tracking study, where the CSat question was halfway through the survey, than in the satisfaction study, where the main CSat question was the first asked after the screener. Further, by the time we turned it into a net satisfaction score (a topic broached later in this article), the difference was magnified.

In another case, the client changed the polarity of the response scale in an ongoing tracker (for complicated reasons that were not related to the execution of this particular study), and scores dropped by several points.

What do those differences in outcomes mean for the ability of customer satisfaction studies to precisely capture the reality of customer satisfaction or dissatisfaction? How much faith should be put in comparisons with other available customer satisfaction scores that could be gathered in even slightly different ways?

Another problem is the tendency to wedge too many questions into CSat studies. CSat proponents believe that nothing is too minor to measure or to matter - a belief eagerly embraced by the client side. "Never miss an opportunity to collect more information" is often the battle cry. "You never know what might turn out to be important."

Thus, we typically subject a once-agreeable respondent to a disagreeably long list of questions, about which they likely have little or no interest. Increasingly, the rational choice for even the most helpful respondent is to decline. Only some kind of remuneration saves the day, but even then a completed survey doesn't promise a thoughtfully-completed survey. Remuneration risks changing the nature of a satisfaction survey and it doesn't preclude the customer from feeling exhausted and abused.

Our statistical methods are getting better and better, but are still limited to the questions we ask and the dependent variables we have available. Are whatever factors that increase CSat scores the criteria for what's important? What if it's unrelated to profits or revenues? Of course, linking survey data to actual customer databases has big implications for confidentiality and how we do surveys. Without the linkage, though, validation is nearly impossible. A good dependent variable - a surrogate for sales - is essential for sound driver analysis.

Finally, the integration of competitor information raises new thorny issues. How do we validly compare CSat scores across companies, if we've had the foresight to collect competitive data? Can the loyalists of one brand be compared to those of another brand, or is brand choice a de facto segmentation variable rendering line-item comparisons irrelevant? This point can be illustrated by contrasting users of Windows-based PCs with Mac owners. There is no question that the latter is the "ease of use" winner, but there is substantial evidence that ease of use is less important to Windows choosers, thereby reducing the comparability between CSat scores which are likely driven by different variables.

This de facto segmentation problem derails other analyses. Addressing large negative gaps in satisfaction drivers might be erroneous if your consumers have already decided that they "like you in spite of" that shortcoming or if it's not a shortcoming that matters to them much.

Measurement confiscation:
Customer satisfaction or self-satisfaction?

Over the past decade, the raison d'être for CSat has quietly morphed from correcting customer problems to measuring company performance.

Various reasons can be cited for this transformation - metrics-driven executives, performance-based personnel systems, etc. - and the evidence for this transformation lies in the ubiquitous scorecards and dashboards lining corporate boardrooms. Kudos to the scorecards where forward-looking strategy and research dictated the measures required, versus the plethora of scorecards retrofitting whatever data was available. The latter metrics are often as relevant as a map of France for exploring the moon.

In one instance, a company one of the authors once worked for was required to measure changes in market share as part of the executive scorecard. In the firm's printer division, the executives, through a series of tortured maneuvers akin to a Rube Goldberg device, actually managed to exclude market leader Hewlett-Packard's printer business from the relevant set of competitors!

In this revised orientation, surveys are aligned with what the client wants to hear far more than what the customer might have to say. A hotel chain frequented by one of the authors seems fixated on knowing if I was greeted by name when I arrived, but it has not once asked if I was happy with their upgrade policy. It seems the desk clerk's performance evaluation trumps the client's satisfaction.

Most researchers are painfully aware that management teams often believe information grows on trees. They are, sadly, oblivious to such concerns as sample availability, projectability, budget constraints, respondent cooperation, respondent endurance, etc. And when we speak of confidence levels and the statistical limitations of non-parametric statistics, they, like Elvis, have already left the building. Consider this all-too-common design decision:

In more than one study we've designed, we've been asked to expand the scope of the study beyond the top segments to a secondary segment with a miniscule incidence. In these cases, the trade-off is often made to keep the cost the same by drastically reducing sample in the top segments. The end result almost always has been a study where only the broadest comparisons are available, and with none of the targeted executives being happy, including the ones who had requested the change.

Net satisfaction scores are another great example where executive edict trumps thoughtful design. The net satisfaction score was devised as a "data reduction" process, and let us be clear: it is more the application of the net sat than the net sat itself that we're attacking. Senior managers seldom have the time, or the inclination, to focus in-depth on anything other than the profit/loss statements and earnings-per-share. So when we set targets for this non-parametric statistic and do so without ample sample, we're treading on dangerous ground.

It is not uncommon to see net satisfaction score goals set that are within the margin of error for the mean score. In other words, goals are set that can be "achieved" or "not achieved" just due to the effects of random sampling. One further comment on net satisfaction: the score extracts one CSat element and attempts to explain

success with that variable alone. This is tantamount to predicting house value using only square footage. Yes, it will correlate but why would anyone in their right mind forfeit more precision by dismissing all other available data and settle for a single predictor? You may be required to provide this but it's your responsibility to point out that data reduction is also data destruction.

Inappropriate application: *Who gave satisfaction a bad name?*

The politics of customer satisfaction have increased the demand for data reduction. Without easy proof of the relationship between satisfaction and revenue, organizations began seeking other applications. The founding principle of "pleasing the customer" has now been replaced with "pleasing the organization."

Here are a few of the final thrusts to CSat's integrity in increasing order of severity. Once used for identifying and correcting customer issues, CSat has become a marketing and performance tool. Organizations, including the aforementioned hotel chain, no longer ask how they did but rather lobby customers with "Give us a 10!" Ineffectual, inappropriate and insulting!

What was once intended to be useful data, employable to aid the customer and thereby better the organization, now largely bypasses the customer and panders exclusively to the organization.

These first examples may be distasteful but the following are even more distressing:

A pioneer of the discipline has long employed some suspect practices. Seeking entry into an organization one of the authors formerly worked at, the firm acquired a convenience sample of advocates from marketing brethren which resulted - wonder of wonders - in our niche convenience sample outscoring the competitors' market sample. Over my protestations regarding the validity of the data, the results were purchased by my colleagues and subsequently used to promote as "best of class" a product with which the market was largely unfamiliar.

A final indignity for CSat originally appeared as recognition of CSat's value. Not only had CSat earned a seat at the "corporate scorecard table," CSat was now invited into the boardroom as a compensation schematic. The pretense that CSat is about the customer had fallen; it was now about your bonus. In this new clime, the focus shifted from customer satisfaction to employee satisfaction.

As CSat has become more and more of a performance and pay measure, the politics surrounding it have grown as well. The failure of management to grapple with sample integrity leaves truck-size openings for tampering. Here are just a few of the shenanigans we've seen:

- Contact information for customer satisfaction interviews is pulled from one or many customer databases. However, sales or other executives have the ability to either exclude "sensitive" customers or those customers who haven't bought anything recently. Never mind asking why those customers haven't bought anything recently.
- Some executives have latitude in "re-coding" accounts so that those accounts fall outside of the group of customers they get measured on, and into someone less fortunate's bailiwick.
- Rehearsing customers who will likely be contacted: "Give me a 10!"
- In one case, the bonus pool was dependent upon the organization maintaining a specified market share. Even though revenues decreased, this goal was easily attained by eliminating poor-performing categories from the "served market space" of the organization.

There are a lot of smart rats out there who know which tunnel the cheese is in. It's not so hard, however, to understand, if not actually empathize, with this kind of behavior. With the imprecision of the metrics such as net satisfaction, indefensibly small and volatile sample upon which most people are measured, and the money at stake, such behavior is hardly aberrant. The real naiveté lies with senior management. They subscribe to the belief that incorporating customer satisfaction into performance measurement is virtuous. Most evidence points to it being deleterious.

This change in how organizations use CSat has eroded the standing of market intelligence groups in most companies. With so much at stake, disputes routinely break out between the measurers of CSat and the measured. As we have shown, there are many grounds for questioning CSat measures, but these disputes with executives mostly focus on the execution of CSat studies in an attempt to improve their scores; no one ever attacks a CSat study when scores are going up. This role alone has swung the relationship pendulum between market intelligence and management from partner to police.

Not always worked well

It's clear that the evolution of customer satisfaction has not always worked well for the market intelligence community or the businesses that we serve. The promise of greater profitability through increased customer satisfaction is clear, and we've all read multiple books that attempt to show these links. But from our experience within some really world-class organizations, we have not seen this link work well in practice. In any particular business, there are dozens of factors that can and do interfere with delivering on the CSat promise.

Despite the somber opening of this article, we do not think customer satisfaction studies should be abandoned. Instead, in the coming articles, we will argue that customer satisfaction deserves - or really, demands - a revised strategy and set of expectations. Once that is done, creative changes in how we execute this strategy can lead to real value. | Q

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but a typical example is a member who has at least one instance of activity, such as earning points on a purchase or redeeming for a reward, within a 12-month period. The 792.8 million number means the rate of active membership is relatively flat at 43.8 percent, compared to 39.5 percent in 2007.

"With roughly one billion inactive memberships, essentially names in databases, it's fair to say the U.S. loyalty industry has reached the middle-age bloat stage," says Colloquy partner Kelly Hlavinka.

"Given the bursting of the credit bubble, the recession and pressure to control program costs, loyalty marketers must turn to growing program value, not the size of their membership base," says Colloquy editorial director Rick Ferguson. "Conditions are ripe for marketers to use loyalty data across the enterprise, enhance value propositions and adopt innovative loyalty models such as coalitions, as they seek to revive lapsed members and turn engaged members into profitable, loyal customers." For more information visit www.colloquy.com.

Satisfaction with online retailers dropping

Customer satisfaction with many of the largest online retailers has taken a dive, and the decline threatens to smother an online retail recovery. The annual Top 100 Online Retail Satisfaction Index from ForeSee Results, an Ann Arbor, Mich., research company, and FGI Research, Chapel Hill, N.C., fell 3 percent since last year to an aggregate score of 73 on a 100-point scale.

Online retail stalwarts Netflix (85) and Amazon (84) led all e-retailers for a fifth year in a row, showing that it is possible to succeed despite tough times. The largest improvements went to the sites of Kohl's (+6 percent year-over-year to 76), Costco (+3 percent since last year, and +6 percent since 2005), and eight other companies that improved 3 percent.

Only 16 of the top 100 e-retailers improved while over half declined. Even Apple.com got knocked from its throne, sliding nearly 6 percent to 75 and now trailing Dell.com and HPShopping.com. Apple's expansion into cell phones has been a boon for the company, but it may be having trouble serving a different customer base on its Web site. Other notable declines include CVS.com (-8 percent to 71, trailing Walgreens.com and Drugstore.com); NeimanMarcus.com (-7 percent to 70) and Willams-Sonoma.com (-6.4 percent to 73).

An analysis of the factors that impact customer satisfaction shows that consumers are more price-sensitive than in previous years. Preceding reports of the Top 100 Online Retail Satisfaction Index have shown that despite being a perpetually low-scoring element, price has had a relatively low impact on overall satisfaction. However, the 2009 study reveals that although shoppers aren't more dissatisfied than in previous years, price now matters more.

Satisfied shoppers are 71 percent more likely to purchase online than dissatisfied shoppers and are 72 percent more likely to recommend the Web site. But satisfaction with the Web site has an impact with a shopper's brand experience and translates into a greater likelihood (44 percent more likely) to make a purchase offline. For more information visit www.foreseeresults.com.

AM/FM losing out to mobile devices

Twenty-one percent of radio listeners say AM/FM radio has a big impact on their lives, ranking second to cell phones (47 percent) - and the Apple iPhone in particular (23 percent) - as the audio platform/device that has a big impact on people's lives, according to The Infinite Dial 2009: Radio's Digital Platforms, a study conducted by Columbia, Md., research company Arbitron Inc. and Edison Research, Somerville, N.J. Overall, the study shows continued growth in usage and ownership of various forms of digital audio platforms, including online radio, iPod/MP3 players and podcasting. But even with the weekly online radio audience increasing over the past year, AM/FM radio may have a difficult time keeping up with iPods and portable MP3 players.

Forty-two percent of persons age 12+ own an iPod or other brand of portable MP3 player, and 64 percent of 18-to-24-year-olds own a digital audio player. And these devices prove to detract from over-the-air radio: 32 percent of teens age 12-17 and persons 18-24 are spending less time with over-the-air radio specifically due to time spent with an iPod or other portable MP3 player.

The weekly online radio audience increased in the past year to 17 percent of the U.S. population age 12 and older; up from 13 percent in 2008. On a weekly basis, online radio reaches 20 percent of 25-to-54-year-olds; up from 15 percent in 2008. However, the numbers are not keeping up with those of iPod/portable MP3 player ownership. For more information visit www.arbitron.com.

Consumers shop for value over brand

Consumers around the world are more wary of trying new consumer goods products when they sense the economy is slowing down. In fact, more than half of global consumers shy away from new grocery, personal and household products during an economic downturn, according to a study conducted by Ipsos Marketing, a New York division of Paris research company Ipsos. The study gathered global consumer attitudes and behavior and surveyed 18 countries.

Not surprisingly, new beauty products are especially vulnerable during an economic downturn, with 70 percent of global consumers saying they are not likely to try a new beauty product. Not only are new products at risk of low trial, but established brands are in danger of low repeat. In the study, 80 percent of global consumers say they are very or somewhat likely to switch from their usual brands to lower-priced brands or brands that are on sale during trying financial times. Moreover, 72 percent of consumers say they would switch to store or generic brands.

One area on which marketers can (and must) focus is value. Value is typically a higher priority for consumers during an economic downturn. While pricing does not necessarily need to change, consumer perceptions about cost versus benefits should be explored to make sure consumers think there is a fair trade-off. Consumer behavior resulting from an economic downturn should also be investigated to uncover new product and positioning opportunities.

"Consumers may dine out less often, visit beauty salons less often and forego outside entertainment such as movie-going," says Sunando Das, vice president of Ipsos Marketing's global consumer goods business, "but these possible changes present marketers with opportunities to offer consumers products that will enable them to replicate these experiences at home for less money."

For example, marketers could offer gourmet-style food that can be prepared in the kitchen, spa products that can give a luxury experience at home and snack products that can be used to recreate the movie theater experience. For more information visit www.ipsosmarketing.com.

Recession morphs dollar-store shopper profile

The recession has been a boon to dollar stores, which attracted increased consumer spending in 2008, including spending among high- and middle-income shoppers. Consumers at all income levels are shopping more at dollar stores, with high-income shoppers spending 18 percent more at dollar stores in the second half of 2008 compared to the prior year, according to New York researcher The Nielsen Company. Dollar stores are outpacing major consumer packaged goods channels among both low- and high-income shoppers.

Despite the increase in spending among high- and middle-income shoppers, low-income shoppers are still the primary dollar-store customer. Forty-five percent of dollar-store sales are from low annual household incomes (below $30,000), 47 percent from middle incomes (between $30,000 and just under $100,000), and 8 percent from high incomes (greater than $100,000).

The most loyal dollar-store customers tend to have low incomes and live in small towns and rural areas or in urban centers. Senior couples, senior singles (particularly widows) and younger families with children are more likely to shop in dollar stores only occasionally, relying on other retail channels to meet the rest of their household needs.

Among those who regularly shop at dollar stores, the most commonly-purchased household items include paper goods, such as napkins and paper towels, detergent, trash bags and cleaning and laundry items. For more information visit www.nielsen.com.

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share data is drawn from a variety of sources. For more information visit www.tvg-inc.com.

Qual/quant combo tool to aid ad research

Ipsos ASI, a Norwalk, Conn., division of Paris research company Ipsos, has designed Next★Adlab, an advertising research tool to help marketers refine and optimize the creative content of their advertising early on and in real time. Next★Adlab is intended to provide marketers with a combination of qualitative insights and quantitative measures to help guide the creative process before having to commit to media and production costs.

A Next★Adlab session begins with a quantitative phase, where up to 50 respondents evaluate ads by using wireless touchpads. The collected data is viewed in real time by the marketing team, and findings are used to inform the subsequent qualitative phase, where a smaller group of respondents dig deeper into the emotional impact of the ad and explore how to optimize it. Depending on how many ads are to be tested, the Next★Adlab quantitative/qualitative process typically unfolds in a central location over one to two days, with some data available immediately.

Next★Adlab is available to Ipsos ASI clients across North America and South America, as well as in Europe and Asia. For more information visit www.ipsosasi.com.

Ipsos Reid panel examines needs of ethnic and new Canadians

Ipsos Reid, a Toronto division of Paris research company Ipsos, has launched Multicultural Connection, an online panel of 3,000 ethnic and new Canadians designed to tap into this segment of the population at a lower cost than that of traditional ethnic research.

The panel was created with the goal of helping marketers understand the thoughts, behaviors and attitudes of ethnic and new Canadians, and the panel is housed in Ipsos Reid's Interactive Forum software, which is a custom panel platform that includes the panelist database (sample), survey scripting and research results data.

Multicultural Connection allows participants to respond in the written languages they are most comfortable with. It is currently available in traditional Chinese, simplified Chinese, Punjabi, Hindi and English, with opportunities to expand language capabilities as the panel grows. For more information visit www.ipsos.ca.

New product combines celebrity and brand scores

E-Poll Market Research, Encino, Calif., has introduced a research tool called MediaSYNC, an online interface that aims to provide subscribers with access to, and control of, data from E-Poll's suite of E-Score research products. MediaSYNC combines brand and celebrity evaluation tools, allowing comparison of brands and endorsers or other talent. Along with the release of MediaSYNC, E-Poll will provide clients with an upgrade in capabilities for E-Score Celebrity, its celebrity evaluation product.

MediaSYNC is an online interface that presents data in a visual format and includes graphing, ranking, sorting, filtering and comparison tools. MediaSYNC houses E-Poll's E-Score Brand and E-Score Celebrity products and will also be the future home for E-Score Character, E-Score Music and FastTrack Television.

E-Score Celebrity subscribers will receive all new features as a no-charge upgrade to their service package. For more information visit www.epollresearch.com.

Harris and Clarabridge partner for Text Analytics

Harris Interactive, a Rochester, N.Y., research company, has released Text Analytics, a service that integrates the text mining technology from Reston, Va., research company Clarabridge and Harris's analytics to map market trends. The solution is intended for companies looking to integrate several sources of information available about their market to improve investment in market research dollars and produce better trend forecasting.

Features of the solution include: classifying and categorizing large volumes of text without manual coding; building interlocking connections and roadmaps between structured and unstructured data; enabling more accurate validation of emerging trends and customer sentiment; using social media, Web and other market intelligence to predict and pursue time-sensitive issues; allowing more open survey design; and utilizing business intelligence platforms to integrate reporting and data exploration tools in enterprise applications.

Text Analytics also incorporates market intelligence from surveys, structured Web content and customer relationship management; mines Web content and extracts insight from online social media and other qualitative sources; is a scalable and systematic method of linking unstructured data with more traditional data sources that use numeric formats; gives structure to unstructured information through the combination of human content expertise, natural-language-based analysis and machine-learning analysis; attaches measures of sentiment (positive and negative dispositions); and allows online reporting of results. For more information visit www.harrisinteractive.com.

NVivo expands multilingual offerings

French and German versions of qualitative data analysis software NVivo 8 have been launched globally. The releases, developed by QSR International, a Doncaster, Australia, research company, are designed to allows users to import and analyze video, audio, images and documents side-by-side; test theories; identify trends; and cross-examine information. Professional models and charts can be created, and NVivo project files and results can be shared via mini Web sites - even with those who don't have NVivo. The software can also identify the work of individual team members even after separate projects are merged. For more information visit www.qsrinternational.com.

Companies team to offer mobile consumer surveys

Pitney Bowes Business Insight (PBBI), a New York research division of Stamford, Conn., document management company Pitney Bowes, has partnered with LandPoint Systems Inc., a GIS consulting firm, to provide a mobile consumer survey service called FACES (fast, accurate, current economical surveys). FACES, offered through LandPoint's KnowYourFaces division, is designed to provide retailers and restaurants with customizable surveys to capture customer data at the point of experience. The service utilizes digital technology equipped with FACES software and PBBI location intelligence solutions. For more information visit www.pbbusinessinsight.com.

Maktoob adds Web-based ad campaign measurement tool

Maktoob Research, a Dubai, United Arab Emirates, research company, has released a product designed to provide insights into the impact of online and offline advertising campaigns. While a company has an online ad campaign running on a Web site, visitors are selected randomly on the site to take a questionnaire by using overlay banners. At the same time, panel members are receiving an invitation e-mail that includes a link to this same questionnaire.

The questionnaire contains about 30 questions and covers topics such as brand awareness and usage, ad awareness, liking, understanding, image and purchase intent. Responses are broken out into four different target groups (i.e., those who are not exposed to the ad, exposed to the ad but not online, exposed to the online ad only, and exposed to the online and offline ad). For more information visit www.maktoob-research.com.

Briefly

PluggedIN, a Rochester, N.Y., research company, has released version 1.5 of its proprietary online community platform. 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. The update to the PluggedIN Platform is intended to enhance the existing discussion forum functionality and includes upgrades to the comment notification system. Existing customers will be upgraded automatically to version 1.5 as part of the software-as-a-service offering. For more information visit www.pluggedinco.com.

Reportlinker.com, a New York online market research report database, has added a new report, titled World Dynamic Signature Verification Market, to its catalog. The report analyzes the worldwide markets for dynamic signature verification by application and by end-use verticals (financial, health care, government, etc.). Annual forecasts and a three-year historical analysis are provided for each region for the period of 2006 through 2015. The report profiles 31 companies. For more information visit www.reportlinker.com.

Leeds, U.K., research company Quaestor has launched Live It!, a toolkit aimed to enable clients to interact more directly with their audiences. Quaestor encourages stepping in front of the two-way mirror and allowing researchers to have a face and name during the research process. Live It! includes techniques named quasi ethnography, immersion sessions, gallery walks, quiz dating, debating panels and carousel sessions, all of which are designed to be customizable. For more information visit www.quaestor.co.uk.

Cross-Tab, a Mumbai, India, research company, has launched Borderless Access, an online panel services company specializing in providing online panels in Brazil, Russia, India and China comprising approximately half a million panelists (250,000 in India; 75,000 in Brazil; 75,000 in China; 50,000 in Russia). The panels represent key demographics of overall Internet population in each country. For more information visit www.cross-tab.com.

InterfaceASIA, a Tokyo research company, has launched online panels in India, Taiwan and Hong Kong. The panels add three Asia-Pacific countries to the company's geographical coverage. For more information visit www.interfaceasia.com.

Invoke Solutions, a Waltham, Mass., research company, has released Engage iBus, an updated addition to its Engage family of products. Engage iBus is designed to combine qualitative and quantitative approaches in real time to allow clients to see the results while the survey is still in the field and to react to the data by inserting new questions or editing existing questions. Within 24-48 hours of the survey closing, clients will receive a PowerPoint presentation with their results. For more information visit www.invoke.com.

Epsilon, an Irving, Texas, research company, has launched Epsilon Targeting, a business division that joins Epsilon Data Service, a compiler of U.S. new-mover data; Abacus, a cooperative database of U.S. multichannel-buyer data; and ICOM Information & Communications, a manager of a direct-response consumer survey database.

The offering includes: Abacus transactional data; consumer-responder database TargetSource; data and delivery vehicle TargetMail; lifestyle data in Target NewMovers and Target NewParents; North America customer composite list offering TargetPlus; and Canadian consumer database TargetIntel. For more information visit www.epsilon.com.

Revelation, a Portland, Ore., research company, has enhanced its software offerings to include Latin American Spanish, continental French and German languages. For more information visit www.revelationglobal.com.

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Insight, have entered into a strategic alliance and will combine operations. Both companies will continue to operate a call center in State College and will operate under one roof at 1333 S. Allen St. Diagnostics Plus also has an office in Pittsburgh.

New York consulting company **Gerson Lehrman Group** (GLG) and San Antonio research company **Frost and Sullivan** have formed an alliance. Frost and Sullivan will become a premium GLG council partner, allowing Frost and Sullivan's consultants to communicate with GLG clients through GLG's platform. Additionally, GLG will introduce published resources from Frost and Sullivan's TEAM Research offering to its clients.

Informa Research Services Inc., Calabasas, Calif., and **Omega Performance Corporation**, a Charlotte, N.C., consulting company, have partnered to deliver an approach for improving financial institutions' employee performance through targeted training and customer experience measurement.

Los Angeles research company **OTX** has formed an alliance with Los Angeles consumer technology immersion lab **Emerging Media Lab** (EML), a division of New York advertising and marketing company Interpublic Group (IPG). OTX will have full access to EML. Additionally, OTX and IPG will issue periodic white papers and reports based on the findings from their collaborative studies. As part of this alliance, IPG will also have access to all of OTX's syndicated research products and services.

Association/organization news

The Marketing Research Association (MRA), Glastonbury, Conn., has officially endorsed Robert Groves, President Obama's nominee as director of the U.S. Bureau of the Census. MRA has urged the Senate to promptly approve Groves and let him begin working.

Additionally, MRA has announced its annual board of directors. Kim Larson of Information Alliance will serve as MRA's 2009-2010 president. Jon Last of Sports and Leisure Research Group will serve on the board as past president; Elisa Galloway of Galloway Research Service Inc. as president-elect; Ken Roberts of Cooper Roberts Research as treasurer; and Kevin Lonnie of KL Communications as secretary.

The following research professionals will join MRA's board as directors-at-large: Debbie Schlesinger-Hellman of Schlesinger Associates; Marisa Pope of Jackson Associates; Jill Donahue of Nestle Purina PetCare Company; and Adam Weinstein of Authentic Response.

Joining the board as workgroup chairs are Diane Kosobud of Ipsos North America; Janet Savoie of M/A/R/C Research; Angela Lorinchak of Metro Research Services; Magda Cooling of Opinions... of Sacramento; and Ted Donnelly of Baltimore Research.

Awards/rankings

Taymoor Arshi, senior vice president, engineering and CTO of Columbia, Md., research company Arbitron Inc., has been selected to the 2009 Academy of Distinguished Engineers at Oregon State University, Corvallis, Ore. Membership is awarded to mid-career Oregon State alumni who have sustained distinguished contributions to their profession, to their field, to Oregon State or to society at large.

New accounts/projects

Dallas research company **e-Rewards Inc.** has entered into an agreement with **InterContinental Hotels Group**, a Denham, U.K., hotel management company. Members of the hotelier's Priority Club rewards program will have the opportunity to enroll in the e-Rewards opinion panels and earn rewards, including Priority Club points, in exchange for sharing their thoughts and opinions with market researchers.

Huntington Bancshares, a Columbus, Ohio, bank holding company, has renewed its contract for a second year with Omaha, Neb., research company **The MSR Group**'s APECS customer satisfaction and advocacy measurement system.

New York researcher **The Nielsen Company** has extended its relationship with **General Mills**, Minneapolis. Nielsen will provide General Mills with retail tracking, insights on consumer purchase behavior, analytic tools and technology services.

Columbia, Md., research company **Arbitron Inc.** has signed a new three-year agreement with San Antonio-based **Clear Channel Communications Inc.** for diary-based radio ratings services, as well as other related agreements.

Additionally, Arbitron has renewed a multiyear agreement with **Beasley Broadcast Group Inc.**, Naples, Fla., for diary-based radio ratings services in five markets: Augusta, Ga.; Fayetteville, N.C.; Ft. Myers, Fla.; Greenville-New Bern-Jacksonville, N.C.; and Wilmington, Del. Beasley had previously signed for the Arbitron Portable People Meter (PPM) radio ratings services in Philadelphia and for PPM services in Las Vegas and Miami when Arbitron commercializes the service in those markets.

Finally, Arbitron has announced plans to raise three of its sample-quality benchmarks and its average in-tab sample targets for cell-phone-only households in its PPM radio ratings services. The company also intends to report PPM panel composition by country of origin for Hispanic respondents starting in the first quarter of 2010.

Several **Baskin Robbins** franchises have selected Nashville, Tenn., research company **edo interactive inc.**'s marketing platform Prewards to deliver incentives. Baskin Robbins will utilize Prewards to incentivize purchases at their Los Altos, Blackhawk, and San Ramon, Calif., locations.

Preward campaigns are designed to allow companies to demographically target specific debit-card holders by offering them a monetary incentive to purchase or use a product – in this case a one-dollar Preward. When consumers choose to accept the Preward, it is stored on their debit card until the point of purchase, at which time it is applied with any remaining balance deducted from their existing balance.

New companies/new divisions/ relocations/expansions

Media Monitors, a White Plains, N.Y., broadcast verification service, has opened a branch in London. Georgie Greenland will serve as the training and support specialist for the region. The company plans to expand further across the British Isles.

Stockholm, Sweden, research company **Cint** has opened an office in Berlin. Michael Henrich, CEO of Cint Germany, will manage the office and be responsible for customer development and support in all German-speaking countries, including Austria and Switzerland.

Entertainment Research and Marketing has opened its doors at 1120 Avenue of the Americas, 4th Floor, New York. The company specializes in delivering audience feedback on movies, live theater, video games and other forms of consumer entertainment.

Leyhausen Field Services International, a Leverkusen, Germany, research company, has opened an office in the Middle East. The facility is located in Riyadh, Saudi Arabia.

Gilmore Research Group, Seattle, has opened a new location with three separate focus suites. Gilmore's corporate headquarters and research team will be housed in the new location at 2101 4th Ave., 8th Floor.

MP Global Link India, a Mumbai research company, commenced operations on April 1, 2009, as a national fieldwork agency. The company formerly served as the field operations unit for Market Probe India, a division of Milwaukee research company **Market Probe**.

Research company earnings/ financial news

The Nielsen Company, New York, announced its financial results for the quarter ended March 31, 2009. Reported revenues were $1,133 million, a decrease of 7 percent over reported revenues for the three months ended March 31, 2008, of $1,214 million. Excluding the impact of currency fluctuations, revenues increased 1 percent.

Reported operating income for the quarter was $109 million, compared to $115 million for the prior-year period. These results were negatively impacted by charges relating to restructuring costs. Adjusting for these items, operating income on a constant currency basis increased 1 percent.

As of March 31, 2009, total debt was $8,576 million, and cash balances were $410 million. Capital expenditures were $64 million, compared with $69 million for the prior-year period.

Arbitron Inc., Columbia, Md., announced results for the first quarter ended March 31, 2009. Net income for the quarter was $12.3 million, or $0.46 per share (diluted), compared with $16.3 million, or $0.57 per share (diluted) for first-quarter 2008. Excluding the $8.2 million pre-tax impact of the previously-disclosed restructuring charge, earnings per share for the quarter were $0.65 per share (diluted).

For the first quarter of 2009, Arbitron reported revenue of $98.5 million, an increase of 4.7 percent over revenue of $94.1 million during first-quarter 2008.

Costs and expenses increased by 19.1 percent, from $63.3 million in 2008 to $75.4 million in 2009, due to planned expenditures for the Portable People Meter ratings panels, the planned introduction of cell-phone-only household sampling in diary markets and expenses of $8.2 million related mainly to severance and benefits for the reorganization and restructuring program announced in March 2009.

Income from continuing operations for the quarter was $12.3 million or $0.46 per share (diluted), compared with $16.3 million, or $0.58 per share (diluted) in first-quarter 2008.

Toluna, London, reported results for the year ended December 31, 2008. Revenue rose 74 percent to £21.7 million (£12.5 million in 2007); net cash from operating activities increased 47 percent to £5.0 million (£3.4 million in 2007); profit before tax increased 48 percent to £4.7 million (£3.2 million in 2007);

total dividend increased 47 percent to 1.65 pence (1.12 pence in 2007); and earnings per share increased percent to 9.63 pence (6.59 pence in 2007).

In 2008, Toluna also acquired Dallas research company Common Knowledge and opened an office in Sydney, Australia.

Ipsos, Paris, reported first-quarter 2009 revenues of EUR 207.3 million, down 4.6 percent compared with the same period of 2008. The three components of this decline were negative organic growth of 5.1 percent; negative currency effects of 2.3 percent; and positive consolidation effects of 2.8 percent due to the consolidation of Punto de Vista, a Chilean research company Ipsos acquired in 2008.

Harris Interactive, Rochester, N.Y., reported total revenue for the third quarter of fiscal year 2009 of $39.9 million, as compared with $57.3 million for the same period in the prior year, representing a decline of $17.4 million or 30.4 percent. Included in the decline was an unfavorable foreign exchange rate impact of $4.4 million.

Operating loss was ($7.3) million, as compared with an operating loss of ($1.9) million for the prior-year period. The operating loss included $5.3 million in restructuring and other charges, specifically $3.4 million for severance related to U.S. and U.K. headcount reductions and post-employment payments to a former executive; $1.1 million for performance improvement consultant fees; $0.8 million in other charges, including a reserve for a note receivable (whose collectability is doubtful) and bank negotiation legal fees.

Net loss was ($6.7) million, or ($0.12) per fully diluted share, as compared with a net loss of ($2.1) million, or ($0.04) per fully diluted share for the prior-year period.

Research Now, London, announced preliminary results for the fiscal year ended October 31, 2008. Group revenues rose 60 percent to £41.2 million (£25.8 million in 2007) and underlying revenue growth rose 40 percent. Repeat business generated 83 percent of revenues. Operating profit rose 15.3 percent to £6.3 million (£2.3 million in 2007). Profit before tax increased to £5.7 million, up from £0.3 million in 2007.

Datascension Inc., Las Vegas, announced financial results for the first quarter ended March 31, 2009. The company recorded earnings up $75,801 over the prior-year first quarter. Total net revenues decreased to $3.7 million as compared to $5.3 million for the prior-year period. Net profit for the quarter was $8,911, compared to a net loss of ($66,890) for the prior-year quarter.

TRA, New York, has closed its second round of series B funding led by Arbitron Inc., raising $13.5 million. The round included participation by current investors Kodiak Venture Partners and WPP, as well as others. TRA plans to use the funds to grow its sales team and invest in Media TRAnalytics, the company's online reporting engine.

Psydex, Atlanta, has received $3.5 million in funding. Psydex will use the investment to launch Psyng, a news service portal designed to scour newswires, Internet feeds, TV closed captions, blogs and other sources of chatter to reveal statistical patterns and trends in social networks, human behavior and financial markets.

Tobii Technology, Stockholm, Sweden, has received EUR 16 million expansion capital from investment companies Amadeus Capital Partners, Northzone Ventures and Investor Growth Capital. The capital will be used to expand Tobii's eye-tracking technology and services.

Cello, London, has acquired an additional 30.6 percent in Fenix Media Limited, London, taking its total holding to 50.7 percent. The original stake was acquired in December 2007.

index of advertisers

By Joseph Rydholm
Quirk's editor

Second half of '09 could set research in motion

Is there cause for optimism in the research community? It's still too early to tell but anecdotal evidence from a number of sources suggests that the purse strings are being loosened up just a bit and some research projects that had been put on hold are inching forward.

In chatting with research vendors in Chicago in June at the MRA's annual conference, hopeful smiles replaced the worried winces that had previously flashed across faces when I've asked how business was going. The general message I got was that while research companies' phones aren't ringing off the hook with new business, there is evidence that client-side researchers are s-l-o-w-l-y starting to ford the waters again.

No one is suggesting, however, that researchers at client companies will be in a rush to make up for lost time and spend like crazy on all of the projects they've held in check during the first half of the year. It's more likely that we're in for a new era of austerity.

Still, many areas of research seem amazingly resilient. Take the venerable focus group, for example. Looking at the numbers from FocusVision Worldwide's 2008 Focus Group Index, which were issued in May, the number of focus groups conducted worldwide in 2008 was 538,000, up 0.2 percent from 2007. Granted, the number of sessions conducted in the U.S. in 2008 declined to 251,000 from 255,000 in 2007 (the number of non-U.S.-groups increased by 1.7 percent from 2007 to 2008), but given that we were in the throes of a downturn for much of last year, it's amazing there wasn't a larger decline.

"It's been such a rough economy for everyone," says Carol McNerney, FocusVision Worldwide's vice president of marketing, in an interview. "Even when the economy was bad in previous downturns, research has been steady, and this is the first time we've seen a bit of dip, which is proof of how bad things really are. Though it's really not that severe of a drop when you consider how tough it has been for other industries."

To compile its figures, Stamford, Conn.-based FocusVision looks at data from a multitude of sources - including ESOMAR, the MRA and other industry bodies - coupled with estimates of advertising and marketing spending and input from its network of 370 facilities around the world.

FocusVision cites the decline in ad spend as having the greatest impact on the number of focus groups conducted. In 2008, worldwide ad spend was $2.641 billion, down from $2.653 in 2007, reflecting the first decrease in U.S. ad spend in five years, according to the firm's data.

Interesting to see

Given the terrible first half, it will be interesting to see the final 2009 figures when all is said and done. Within the U.S. so far this year, FocusVision has noticed an interesting geographic difference, McNerney says. "It's more anecdotal at this point, but our East Coast facilities had a really tough first quarter this year but they are seeing the second quarter really turn around. Our West Coast facilities were the opposite: They had a strong January, February and March but they are having a tougher April and May."

In assessing the near-term prospects, McNerney echoes the sentiments I heard from the other research company reps I spoke with at the MRA event. "We are seeing everything coming back slowly. We got the impression the first quarter that everyone was holding their breath and waiting, and now we are seeing them start to do a lot more research. I think everyone just said, 'We don't know what's going to happen so let's freeze our budgets until we start to see things turn around.' It wasn't like they were cancelling the research, they just wanted to wait until 2Q. They probably won't make up to the numbers that they would have spent but at least it's back on the upswing." | Q

Total Number of Focus Groups Conducted

Year	Worldwide	U.S.	Non-U.S.
2008	538,000	251,000	287,000
2007	537,000	255,000	282,000
2006	519,000	248,000	271,000
2005	501,000	239,000	262,000
2004	490,000	233,000	257,000

Percent Change in the Number of Groups Conducted

Year	Worldwide	U.S.	Non-U.S.
2008	0.2%	-1.4%	1.7%
2007	3.5%	2.9%	4.1%
2006	3.5%	3.7%	3.4%
2005	2.5%	2.5%	1.9%
2004	3.2%	3.6%	2.8%

Total Ad Spend (thousands)

Year	Worldwide	U.S.	Non-U.S.
2008	$2,641	$1,315	$1,326
2007	$2,653	$1,349	$1,303
2006	$2,526	$1,273	$1,253
2005	$2,438	$1,227	$1,211
2004	$2,383	$1,196	$1,187

Percent Change in U.S. Ad Spending

Year	Spending
2008	-2.6%
2007	0.2%
2006	4.2%
2005	2.8%
2004	7.6%

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cover-to-cover

Facts, figures and insights from this month's issue

> Colloquy pegs the number of active memberships in U.S. loyalty programs at 792.8 million - a number that the study's authors characterize as "one of the worst-kept dirty secrets of the industry." *(p. 8)*

> The questionnaire design and response data should be carefully examined whenever poor respondent behavior is suspected, because there may be legitimate reasons why the respondent has sped through the survey. *(p. 23)*

> Other factors - time of year, localization, topic, and not-tested factors such as survey design - are more likely than gender to influence the response rates and question answers. *(p. 45)*

> Customer satisfaction has outlived its usefulness - at least in its current incarnation. That's a shame, given its profoundly valuable charter "to identify and resolve customer issues." *(p. 62)*

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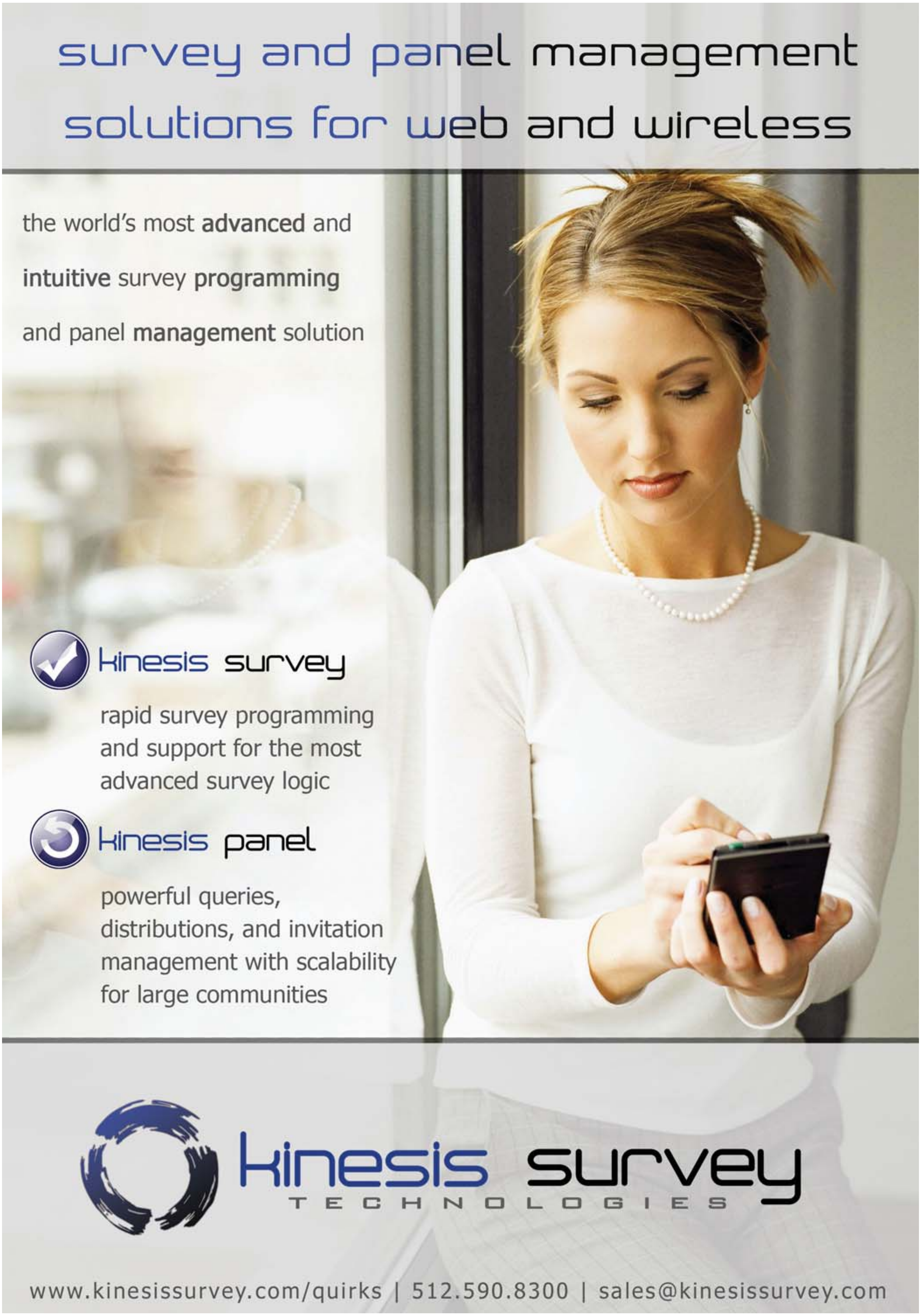
To register, e-mail your complete contact information to contest@quirks.com. Please include "TechSmith Contest" in the subject line. Deadline to enter is August 1, 2009. The winner will be selected at random and announced in the October issue of *Quirk's*.

Congratulations to May's winner, Julie Landers of Texas Instruments, Education Technology, Dallas.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