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JANUARY 2010

Marketing Research Review

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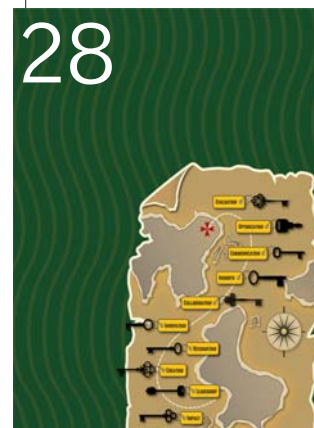


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in case you missed it...

news and notes on marketing and research



Chipotle kids' menu shows the possibilities are limitless

Chipotle Mexican Grill is using research to see if less is indeed more. While the simplicity of its menu is one of its cornerstones, the company aims to appeal to cash-strapped parents by highlighting its ability to make virtually anything with the ingredients available at the behest of the customer, according to Jordan Melnick's October 2009 Web-only article "Chipotle's secret menu," for *QSR* magazine.

The menu at most Chipotle outlets hasn't changed much in the past 16 years; across the country the options may seem standard to a fault, with only a few traditional end-product items to choose from: burritos, tacos, quesadillas, chips and guacamole.

A meal of \$6 burritos that can border on two pounds each is hardly a logical choice for most families with small children, so as a gesture toward Chipotle's smallest customers the company has decided to come forward with its longstanding (but largely unadvertised) kids' menu. Kids' menu items include quesadillas, single tacos and a build-your-own taco kit, all for under \$4.

In its effort to cater to budget-conscious consumers looking for a little variety, Chipotle is conducting research in markets across the U.S. to see if its kids' menu can draw in more families and get customers thinking beyond the menu board. Research indicated that customers are not grasping the depth of Chipotle's menu, which contains over 60,000 ingredient combinations, and Chipotle's kids' menu demonstrates the versatility of the standard ingredients (and staff) to meet the needs of customers. After a promising test run in its hometown of Denver, Chipotle has included the kids' choices onto the menu board in Boston, Dallas, Sacramento and Denver, as well as statewide in Arizona and Wisconsin.

Though still in its infancy, there are some signs the kids' menu is going over well with customers. "We've had almost triple the kids come in than we normally have because they love the meals," said J.B. Gordin, a cashier at a Sacramento location. "The parents think it's great because a lot of times they have to order a big burrito or a big quesadilla for the kids and they end up having to throw most of it away." Gordin says so far the build-your-own taco is the big seller.

Study coins four post-recession consumer typologies

While anxiously awaiting the return of a robust and booming economy, marketers must consider the long-lasting effects of the recession on the consumer mind-set. Gone are the days of frivolity and the naive notion that the good times can last forever. In their place are cautious spending and future-planning, at least for many Americans, according to *Marketing to the Post-Recession Consumers*, a study conducted by Dectica, a New Jersey research company.

The study identifies four distinct consumer segments that will remain after the smoke clears: Steadfast Frugalists, Involuntary Penny-Pinchers, Pragmatic Spenders and Apathetic Materialists.

Steadfast Frugalists (20 percent) are committed to self-restraint, engaging in prudence with unequivocal enthusiasm. Eighty percent of Steadfast Frugalists say the behaviors they have adopted will likely stay with them for a long time, and 29 percent of individuals in this group considered themselves tightwads. They are the least brand-loyal and most likely to discount marketing messages.

Involuntary Penny-Pinchers (29 percent) have been severely affected by the recession and are mainly made up of households with less than \$50,000 in income. Presently, their actual behaviors do not differ widely from those of Steadfast Frugalists. Where they diverge is in their aversion to expending effort in money-saving strategies. Only 17 percent find buying store or generic labels to be satisfying, compared to 59 percent of Steadfast Frugalists. Seventy-seven percent of Involuntary Penny-Pinchers admit to being more scared by the recession, 81 percent more stressed and 87 percent more worried about the future than other groups.

Pragmatic Spenders (29 percent) are consumers whose income has blunted the effects of the recession. Only 28 percent of Pragmatic Spenders feel the recession has changed what and how they will buy in the future, compared to 55 percent of Steadfast Frugalists. Pragmatic Spenders are over-represented by people in their 60s and from the Northeast and West.

Apathetic Materialists (22 percent) seem least changed by the recession. They have not embraced the new frugality to the same extent as others and get minimal satisfaction from such behaviors. Only about 6 percent in this group find price comparison to be satisfying, in contrast to 85 percent in the Steadfast Frugalists camp. This group has more men (55 percent) and younger consumers (72 percent) below the age of 40. Eight percent admit to being very focused on value, compared to 30 percent of Pragmatic Spenders and 52 percent of Involuntary Penny-Pinchers.

Research seeks out Romanian trendsetters in Virtual Bucharest/Second Life

Using the social network Second Life, Bucharest-based research company GfK Romania is reaching into consumers' alternate realities to glean insights into their real-world activities.

GfK Romania has established the first focus group aimed at exploring the opinions, attitudes, motivation, expectations and lifestyle of Second Life visitors ages 15-22 who "live" online in Virtual Bucharest, a Second Life community established in November 2008. Participation in the virtual research is marketed to Second Lifers as "an interesting and well paid 'job' for any resident wishing to share information about their consumption habits inside the virtual world," according to Virtual Romania.

One project was conducted from September to October 2009, and GfK Romania used a mix of qualitative methodologies: classical focus groups, discussions on online forums and virtual focus groups among Second Lifers, where the moderator and the respondents "met" in the conference space of Virtual Bucharest. Participants were recruited via questionnaires and informal discussion groups and selected based on which respondents behave as opinion leaders among their peers.

Second Life users are generally trendsetters, early adopters, people with influence in their social circles and masters of social networking tools. Most of them are producers of content - writing on blogs, using photo and video sharing or producing virtual goods.

Virtual Bucharest is a three-dimensional virtual replica of the capital and aims to gather within its borders the Romanian community. Before GfK Romania brought research into Virtual Bucharest, other companies had developed marketing plans (conferences, live concerts, product launches, live competitions) in the Second Life environment. As of late 2009, Second Life had over 15 million registered accounts, an economy and its own currency (Linden dollars).

All hybrids are just not the same

Hybrid research is all about utilizing the right blend of methodologies to accomplish the task at hand. However, combining focus groups and quantitative surveys is like trying to create a new breed, but the end result is not what you imagined. Dynamic hybrid research is achieved by formulating the right blend – not by stacking one methodology atop another.



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Consumers see economic collapse as a welcome slap in the face

More than half of all respondents across the globe have permanently changed their attitudes toward saving as a result of the credit crunch, and many see the changes they've made as a positive thing. Americans in particular are more focused than ever on paying down debt and controlling their finances. Forty-one percent of people globally, including one in four Americans, said they were glad the world had an economic crisis, as it has



helped them realize their priorities, and 52 percent of Americans have permanently changed their attitudes regarding the importance of saving money, according to a study from Chicago research company Synovate.

While 42 percent of Americans are looking forward to being able to spend freely again, 59 percent said they are going to do their best to not go back to the way they spent before. Overall, 26 percent of respondents are using more cash now as a better way to curb spending, including 21 percent of Americans. However, more than half of Americans are using cash less and 34 percent are using debit cards more, demonstrating a focus on control and having the money before spending it, but also flexibility and convenience. Thirty-eight percent of Americans say they are using credit cards less, and checks are also on their way out, with 48 percent using them less.

Other changes Americans have gone through include: revising their budgets

(17 percent); changing banks (6 percent); selling shares or taking money out of the stock market (9 percent); switching to safer investments (7 percent); and personal or partner job loss (9 percent). There has also been more closing of credit card accounts (15 percent) than opening (9 percent), and 13 percent of Americans admit to having made late payments on a credit card.

Respondents were also asked what they have postponed buying (or spent significantly less on). Twenty-two percent of Americans have been holding off buying a new TV, computer or other large appliance. In addition, 16 percent of Americans say they have postponed or spent less on purchasing a car, and 10 percent have delayed or spent less on a vacation.

Changes have been more personal, too. Globally, 6 percent of people say they have delayed having a baby, including 2 percent of Americans. Five percent of respondents globally have postponed surgery in the past six months, including 7 percent of Americans. Of the Americans who delayed a major purchase, changed a life decision or spent less, 45 percent did this because they didn't have enough money, while 11 percent were waiting for a bargain and another 11 percent thought it just seemed wrong to spend a lot at the moment.

In order to understand people's main financial priorities across the globe, Synovate asked respondents what they would do if \$1,000 landed in their lap today. The most popular response was put it in a bank savings account (28 percent), followed by pay off/pay down debt (17 percent); spend it on necessities like food or household bills (17 percent); and spend it on something fun (15 percent). More than one-third of Americans would use the \$1,000 to pay down debt, while 23 percent say they would put

that money straight in the bank and 21 percent would spend it on necessities. Only 7 percent would blow their loot on something fun.

Although over half of Americans agree that their trust in financial institutions has declined and 57 percent believe that more government regulation is needed for the financial industry, people are not going to stop investing in the future. The one thing most respondents agreed on: It is the responsibility of each generation to leave the country better off for the next generation (83 percent of Americans and 84 percent of people globally agreed). For more information visit www.synovate.com/insights.

Low price on poor product not a great deal

While much has been made of America's newfound thriftiness, shoppers may be less focused on price than most marketers think. In fact, according to The New Value Paradigm: Theatrics of Thrift, a study from Bellevue, Wash., research company The Hartman Group, when shown 25 different statements about grocery store products and what factors they consider most when making a purchase, respondents ranked "It works well/tastes good" No. 1, followed by concerns about waste, such as "Will this product actually be consumed in its entirety by my family?" Price only came in at No. 6.

For example, one of the items that ranked poorly in the study was a Costco multipack of chips. "While everyone said their family ate the BBQ and other flavors, no one ate the blue cheese or ranch. Although the price was very low, consumers saw it as having a poor value," says Jarrett Paschel, vice president of The Hartman Group.

Consumers are actually willing to pay a little more for a product they believe they will use fully, says Michelle Barry, senior vice president of The Hartman Group. "Waste is something they see as costly."

Barry believes that while consumers are managing their economic anxieties

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names of note

Larry Brownell, CEO of the *Marketing Research Association*, Glastonbury, Conn., will step down from his post on January 31, 2010, after over six years of service.

Susan Whiting of *The Nielsen Company* has been appointed to the board of directors of San Francisco branding company *MarkMonitor*.

Food and Beverage Brand Builders, a Dallas research company, has named **Mark Reinheimer** principal.



Reinheimer

Santaniello

Atlanta research company *CMI* has hired **Jodie Santaniello** as senior business development representative.

London research company *Illuminas* has relocated **Gordon Smith**, associate director, from London to its New York office.

Cathy Cromley has joined *Market Connections*, a Chantilly, Va., research company, as director, business development.

Paris research company *Ipsos* has named **Alex Gronberger** CEO of Ipsos ASI, its advertising research division. Gronberger is based in Chicago.

ActusMR, a Lewisville, Texas, research company, has appointed **Paul Kirch** as executive vice president and chief financial strategist.

Batavia, Ill., research company *E-Tabs* has hired **Steven Werner** as vice president, business development. Werner will be based in Chicago. In

London, **Paul Morgan** has joined *E-Tabs*' sales team.

TRA Inc., a New York research company, has appointed **Bob Meyers** president and COO.

The MSR Group, an Omaha, Neb., research company, has hired **Fred Mavinga** as vice president, senior methodologist, statistical research services.



Mavinga

Cespeshas

Chicago research company *Synovate* has made several appointments to its global operations: **Jessica Liu**, research director, media, Beijing; **Sue Phillips**, CEO, Synovate Censydiam; **Mike Cassidy**, managing director, Australia; and **Brent Stewart**, CEO, strategic units, Australia. **Rafael Cespeshas** has also been promoted to managing director, Chile.

M/A/R/C Research, Irving, Texas, has hired **Phil Ebeling** and **Scott Waller** as vice president, client development.

John Mackay has joined London research company *Voxco* as senior sales consultant.

James Walker has been appointed chief strategy and development officer of Leeds, U.K., research company *Nunwood*. Additionally, the company has relocated **Maria Slaymaker** from Leeds to its New York office. Also in New York, Nunwood has hired **Jeremy Hodgekinson-Price** as vice president, Fizz Knowledge Systems, U.S. division; and **Beng Delgado** as director, qualitative accounts.

Vancouver, B.C., research company *Vision Critical* has hired **Patricia Hughes** as executive vice president, consumer practice. Hughes will be based in Chicago.

Mark Turim has been named president, Asia-Pacific, of Port Washington, N.Y., research company *The NPD Group*.

Test Track Research Inc., Florham Park, N.J., has appointed **Mark Dulle** as director, business development. Dulle will be based in Cincinnati.



Dulle

Baid

Ajit Baid has been named executive vice president, client strategies, of *Roger Green and Associates Inc.*, a New Hope, Pa., research company.

R/GA, a New York research company, has hired **Jonny Longden** as director, analytics and accountability.

J. Mark Wirthlin has been named president and COO of Salt Lake City research company *The Modellers*.

Dave King has been appointed president, CEO and director of *Techneos Systems*, a Vancouver, B.C., research company.

Harris Interactive, a Rochester, N.Y., research company, has hired **Eric W. Narowski** as interim CFO following the resignation of **Robert J. Cox**. Additionally, Harris Interactive has hired **Mike de Vere** as senior vice president, sales and marketing.

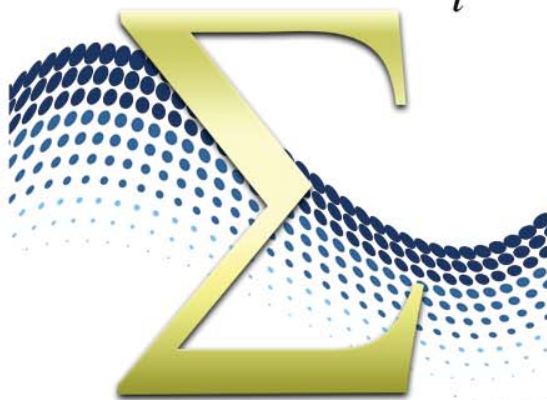
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product and service update

Interactive Dashboard aims to improve handling of VOC data

Montreal research company iPerceptions Inc. has released its Interactive Dashboard, designed to allow users to work with voice-of-customer (VOC) Web analytics data and manipulate quantitative and open-text feedback in real time. The iPerceptions Interactive Dashboard also allows site owners to set minimum thresholds for key metrics, such as task completion and overall experience satisfaction, and trigger alerts when thresholds are encountered.

The dashboard aims to mold the data around business objectives and remodel data through a graphical interface that replaces queries and spreadsheets with charts and graphs. Features include a key performance indicator (KPI) tracker to monitor user-selected VOC KPIs over time; a data miner to crosstabulate and manage survey data; a text miner to browse and visualize associated open-ended text data; benchmarking to track the VOC Web site KPIs against the VOC KPIs of a self-selected combination of industries and consumer self-initiated surveys, served by iPerceptions 4Q and webValidator Continuous Listening Solutions; and an outcome predictor to run priority grids and model what-if scenarios. For more information visit www.iperceptions.com.

Maktoob creates Middle-East consumer community by opening its Arab Eye

Maktoob Research, Dubai, United Arab Emirates, has debuted Arab Eye, an interactive online community aimed to create a network of consumers who participate in online surveys and polls. The Web site (www.arab-eye.com) features an English and an Arabic interface and is designed to ensure that the surveys reach the right consumers. Members can view and update their profile to receive surveys that match their profile and interests.

Arab Eye allows members to meet and interact within the community through chats and discussion boards;

post poll questions; and put forth questions on the discussion boards. Members are able to view live results of their poll questions on the Web site.

The service also offers rewards to members under a point system; members are able to collect points by participating in surveys, polls and discussions, which can be redeemed against cashU credit. For more information visit www.maktoob-research.com.

Companies partner for Digital World Report service

GfK Retail and Technology, a Nuremberg, Germany, research firm, has partnered with the Consumer Electronics Association, Arlington, Va., to offer The GfK Digital World Report, a database service of point-of-sale information that aims to provide insight into the electronics industry, including global sales measurement for IT, telecommunication and consumer electronics markets; a database of manufacturing sales data in the U.S. and retail sales data in the rest of the world; a database of sales for 400,000+ retailers worldwide; global reports with drill-down to product level; world, regional and country information; report delivery on a yearly, quarterly or monthly basis; and annual global forecasts by product, region and country. For more information visit www.gfkr.com.

Box Office Essentials debuts in Russia

Rentrak Corporation, a Portland, Ore., research company, has launched Box Office Essentials in Russia, wherein Rentrak will collect ticket-sales data from 800 theater locations incorporating 2,800 screens in Russia.

Box Office Essentials is designed to provide password-protected, real-time, Web browser-based, 24/7 access to data pertaining to movie release titles and to allow distribution executives to view and analyze the information at different levels of detail and across different attributes. Additional features include online school calendars, inter-

active release schedules and 24-hour subscriber support. As part of the roll-out, Rentrak has opened a Moscow field office. For more information visit www.rentrak.com.

Decipher updates online portal

Decipher, a Portland, Ore., research company, has updated three areas of its online data reporting portal: field reporting, Q&A mode and data reporting. The field reporting tool received an updated look and feel, and the data reporting functionality received a new user interface with the addition of a question tree, designed to improve report navigation. The Q&A mode also received a new user interface that includes a question tree and a one-click change management function designed to upload, download, view change history and import changes into the Q&A system. Enhancements were also made to the existing options of viewing and editing survey changes and navigation between languages. For more information visit www.decipherinc.com.

Vision Critical enhances Sparq platform

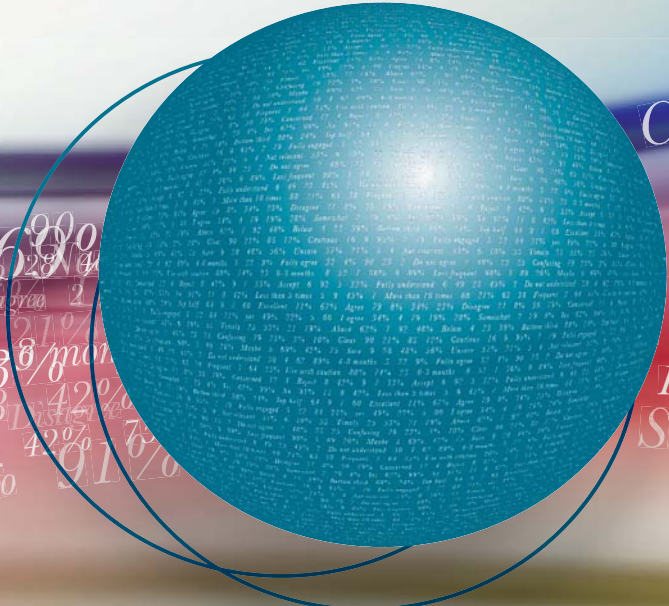
Vancouver, B.C., research company Vision Critical has rolled out its Globalization Expansion Pack for Sparq, the company's online research platform. The Globalization Expansion Pack's new features include expanded language support for surveys; multilingual support for communities; greater control during the survey authoring and translation process; and a new multilingual reporting feature designed to allow users to choose the languages for viewing survey reports.

Vision Critical has continued its creation of interactive visual question types with its scale slider grid and two new visual grid question types. The visual questions, available to all Sparq clients, are intended to help users create more engaging surveys. The Globalization Expansion Pack is also designed to enhance the flexibility of

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Intelligence
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9%
132
4%
90
32
4%
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More than 10 times
80%
79
74%
23
23%
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News notes

The Council for Marketing and Opinion Research (CMOR), a division of the Marketing Research Association, Glastonbury, Conn., announced in November that it has called upon Congress to alleviate the negative impact of the Universal Service Fund (USF) on telephone survey and opinion research. The USF serves a variety of programs for rural and low-income telecommunications, paid for by fees assessed on telecom companies, which the companies then pass through to telephone users. "CMOR opposes the imposition of the USF fee as a pass-through charge to telephone users - the equivalent of a tax on telephone survey and opinion research," said Howard Fienberg, director of government affairs for CMOR, in a press statement.

The USF changes quarterly depending on the needs of the programs. CMOR has advocated making the change an annual one, which would allow telephone users to better prepare for the costs on their phone bills.

Reston, Va., research company **comScore Inc.** intends to decrease its workforce by 8 percent, or about 50 employees. ComScore cites the weak advertising market; the need to shift resources to support the growth of its Media Metrix 360 service; and high attrition among its smaller customers as the reasons for the reduction.

Saskatoon, Saskatchewan, research company **Itracks** has been issued a reexamination certificate from the **United States Patent and Trademark Office** upholding the validity of Itracks' U.S. Patent No. 6,256,663, which relates to a system and method for conducting online focus groups using remotely-located participants.

Acquisitions/transactions

Reston, Va., research company **comScore** has agreed to acquire **Certifica**, a Santiago, Chile, Web

Calendar of Events January-March

Quirk's and Brett Hagins will present a Webinar titled "Managing Research Expectations: Best Practices in Business Problem Diagnosis" on January 26 from 12 p.m. to 1:45 p.m. CST. Attendees will learn proven methods for defining research study objectives and linking them to business outcomes. The cost is \$149 per person. To register visit <http://quirks.webex.com> or call 651-379-6200. See ad on page 61 of this issue for more information.

StratConn will hold a conference, themed "Retail and Shopper Insights," on January 20-21 in Rosemont, Ill. For more information visit www.stratconn.org.

Clarabridge will hold its annual customer connections users conference on January 25-27 at Walt Disney World's Yacht and Beach Club Resorts in Orlando, Fla. For more information visit www.regonline.com/clarabridge.

The International Quality and Productivity Center will hold its annual call center summit on January 26-29 at the Gaylord Palms Hotel and Convention Center in Orlando, Fla. For more information visit www.callcenterevent.com.

The 2010 Pharma Market Research Conference will be held on February 1-2 at the Sheraton Parsippany Hotel in Parsippany, N.J. For more information visit www.pharmamarketresearchconference.com.

The MRA will hold its annual CEO summit on February 10-12 at the Boca Raton Resort, The Waldorf Astoria Collection, in Boca Raton, Fla. For more information visit www.mra-net.org.

CASRO will hold its annual panel conference on February 24-25 in New Orleans. For more information visit www.casro.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.

ESOMAR will hold its global health care research conference on February 28-March 2 in New York. For more information visit www.esomar.org.

Globalpark will hold its annual mobile research conference on March 8-9 in London. For more information visit www.mobileresearchconference.com.

Frost & Sullivan will hold its annual competitive intelligence conference, themed "Strategic Competitive and Market Insights to Propel Profit and Growth," on March 10-13 in Washington, D.C. For more information visit www.frost.com.

PMRG will hold its annual national conference on March 21-23 at Disney's Contemporary Resort in Orlando, Fla. For more information visit www.pmrgrg.org.

The ARF will hold its annual RE:THINK! convention and expo on March 22-24 at the New York Marriott Marquis in Times Square. For more information visit www.thearf.org.

Research Magazine will hold its annual conference on March 23-24 at the Park Plaza Riverbank in London. For more information visit www.research-live.com/research2010.

measurement firm. Sites measured by Certifica will be available for inclusion (on an opt-in basis) in comScore's Media Metrix 360 measurement solution.

IMS Research, Wellingborough, U.K., has acquired **Young Market Research (YMR)**, Austin, Texas, in an effort to branch into display, TV, solid-state lighting and photovoltaic research. As part of the transaction, YMR executives will offer their ser-

vices to IMS Research.

Vancouver, B.C., research companies **Vision Critical** and **Angus Reid Strategies** have agreed to merge. The resulting company will combine the research and global panel capabilities and consultative service of Angus Reid Strategies with the technology and innovation offerings of Vision Critical. The Angus Reid

continued on p. 66

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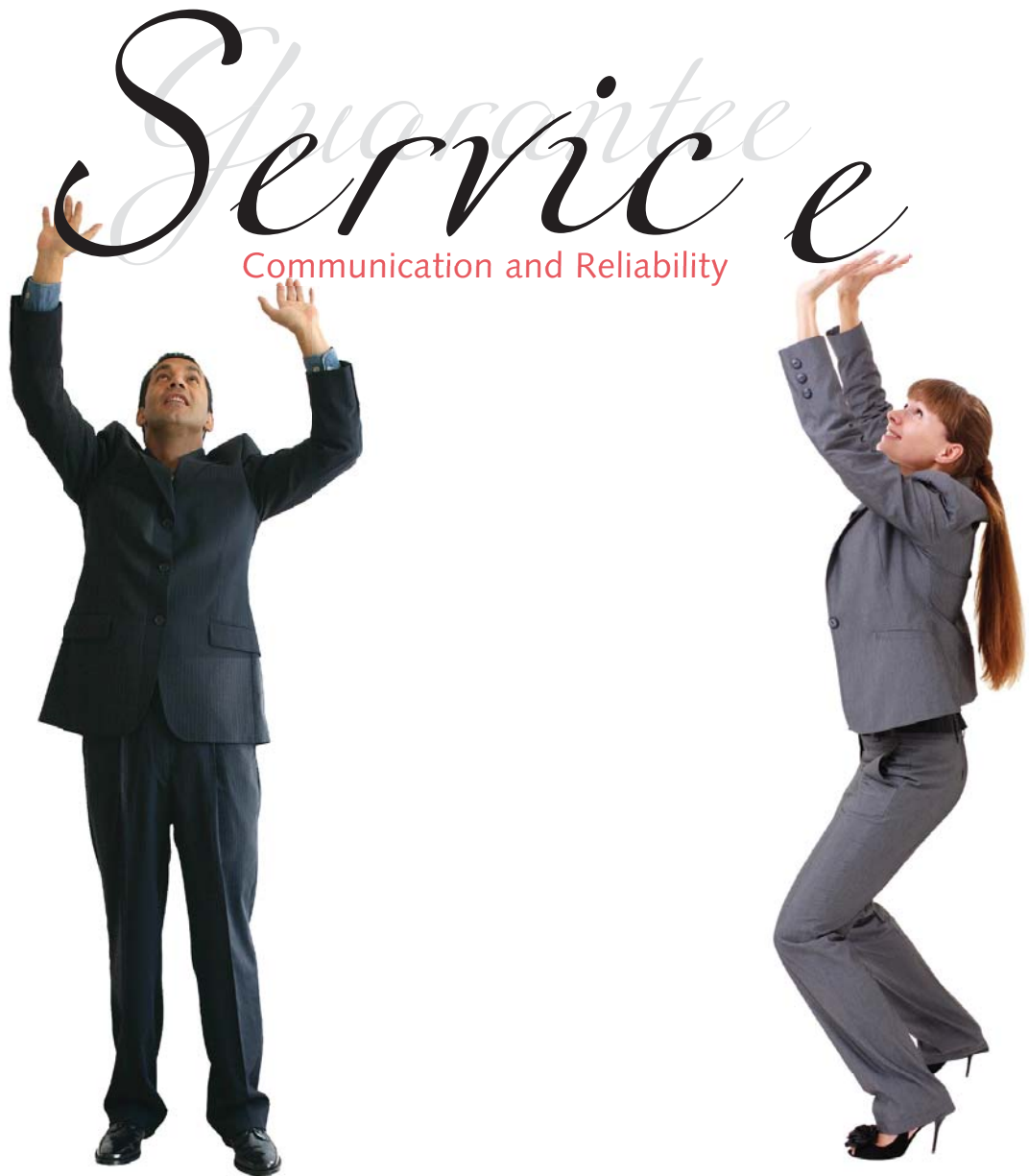
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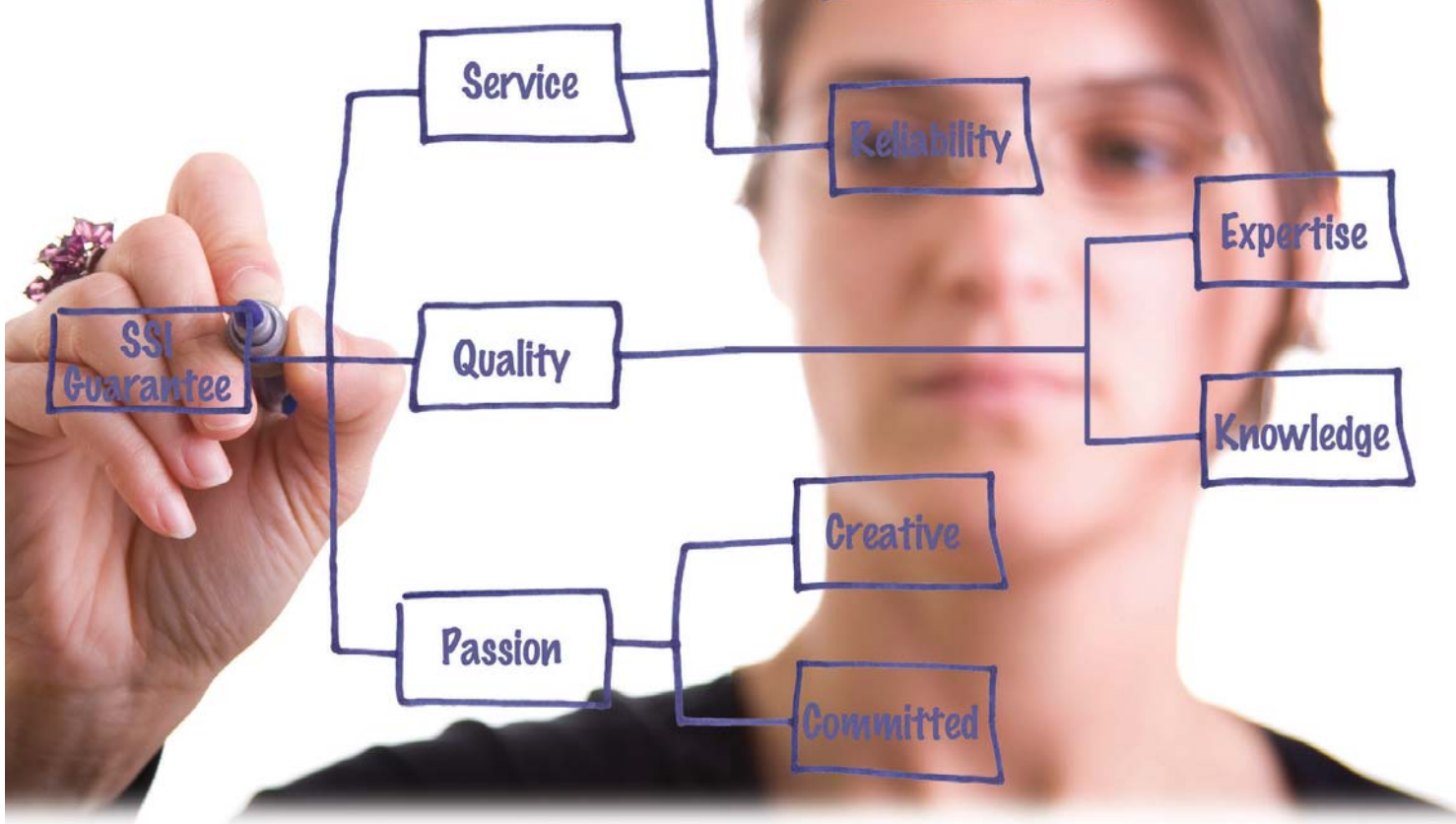
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A good choice for choice modeling

To some degree, all decisions involve choice. Individuals choose among different alternatives; commuters choose among possible routes and methods of transport; shoppers choose among competing products based on attributes such as price, quality and quantity.

Unlike with traditional polls and surveys, choice model predictions can be made over large numbers of scenarios within a context, to the order of many trillions of possible scenarios. Choice modeling is the most accurate and general-purpose tool currently available for making behavioral predictions, and human decision-making is regarded as the most suitable method for estimating consumers' willingness to pay for

quality improvements in multiple dimensions.

In marketing research, the most common types of choice models are forms of conjoint analysis, such as discrete choice modeling or paired-comparison analysis.

One option for choice modeling is maximum difference (max-diff) analysis (or scaling). Max-diff is based on customer choice or trade-off instead of typical rating-scale responses. Max-diff is the multinomial extension of the traditional method of paired comparisons (Thurstone 1927, David 1988). Whereas a paired-comparison question asks a respondent to make a binary choice, max-diff has the respondent specify "best" and

Editor's note: Michael Lieberman is founder and president of Princeton, N.J., research firm Multivariate Solutions. He can be reached at 646-257-3794 or at michael@mvsolution.com. To view this article online, enter article ID 20100101 at quirks.com/articles.

"worst" choices from sets of three or more objects.

Most importantly, max-diff allows the researchers to test a large number of attributes without having to resort to unwieldy, large orthogonal models or the complicated process of adaptive conjoint analysis. What can be accomplished with 10 relatively simple max-diff choice scenarios replaces up to 70 paired-comparison analyses.

A maximum-difference choice model is easily administered, has multiple levels of analysis and is a very effective tool in establishing the relative priority of such items as:

- potential message for a new product;
- features or benefits of a service;

snapshot

Maximum difference scaling lets researchers present respondents with large numbers of choice options without making the process onerous. The article uses examples of a hotel loyalty program and restaurant menu optimization to show the technique in action.



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Example 1

Least Important	Reward	Most Important
	Free Hotel Nights	✓
✓	Experience Getaways	
	Dream Vacations	
	Premium Merchandise	

Example 2

Least Important	Reward	Most Important
	Bonus Points	
	Complimentary Health Club Privileges	
	Hotel Room Upgrades	✓
✓	Reward Planner Services	

- which extras to include in a loyalty program;
- which political message most resonates with different segments of the public;
- fundamental customer interests and activities;

- unmet/future needs.

Max-diff can eliminate the awkwardness of a large set of customer choices, move respondents rapidly through the survey, ease respondent fatigue and remove problems

of clustering of attributes at either the top or bottom end of discrete scales. Moreover, max-diff reveals the descriptive results that companies are looking for and can be applied to large databases to predict future customer behavior.

This article will run through examples of a max-diff, presenting representative case studies showing the three levels of output that a max-diff analysis can deliver.

Maximize its loyalty program

Our fictional hotel chain, Malone Gardens, one of several chains owned by Colossal Hotels Inc., is seeking to maximize its loyalty program. It has indentified 12 loyalty benefits that it's considering offering its guests:

- free hotel nights;
- experience getaways;
- dream vacations;
- premium merchandise;
- airline miles;
- bonus points;
- complimentary health club privileges;
- hotel room upgrades;
- reward planner services;
- spa or golf packages;
- partner car-rental privileges; and
- shopping and dining.

Malone Gardens is conducting a survey across a sample of approximately 2,000 potential Malone Gardens guests to see which of the 12 rewards would maximize loyalty to the brand. Examples 1 and 2 show potential choice scenarios.

During the course of the Malone Gardens survey, each respondent might see eight to 10 or more of these randomized scenarios (if a respondent were to see all possible matches, there would be 495 choices to make). A key benefit of max-diff is that, unlike conjoint analysis, all respondents are not required see the same scenarios as each other in order for the analysis to be performed. Thus, each respondent in the sample may see completely different sets of max-diff choices. This has no effect on the analysis.

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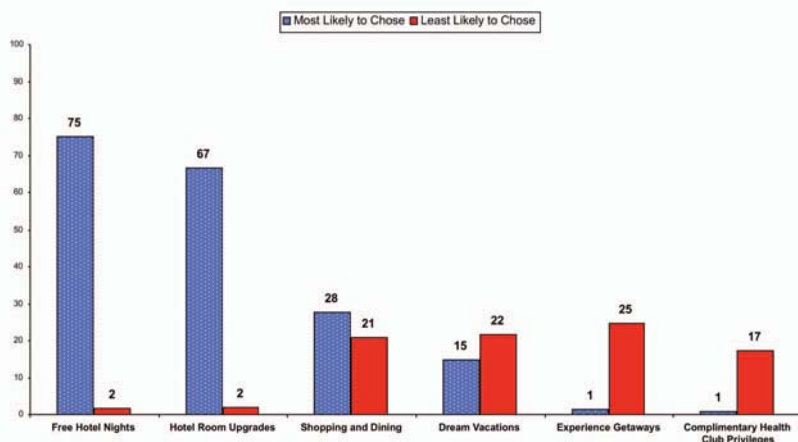
Figure 1

Maximum Difference Point Mean Allocations		Total Sample
Free Hotel Nights	Level 1	75.0
Hotel Room Upgrades		66.5
Shopping and Dining	Level 2	27.7
Dream Vacations		14.9
Experience Getaways	Level 3	1.4
Complimentary Health Club Privileges		0.9
Premium Merchandise		-2.7
Airline Miles		-3.7
Spa Or Golf Packages	Level 4	-6.2
Partner Car Rental Privileges		-25.8
Bonus Points		-30.8
Reward Planner Services		-64.7

Level 1 - WINNERS - Highly desirable items that have high/low scores near 100
 Level 2 - DESIRABLE - Items with a high/low over 10
 Level 3 - NEUTRAL - Items with a high/low near 0, indicating indifference
 Level 4 - NOT DESIRABLE - Items with high/lows scores over negative 20

Figure 2

'Most Appealing' vs. 'Least Appealing' Percentage (Total Sample)



The larger the contrast between Most Appealing (blue), and Least Appealing (red), the more desirable the attribute.

The first outputs are general charts (such as Figure 1) that show percentage differences for each attribute. We refer to these as high/low visuals. Among scenarios with each reward present:

- a reward scores +100 if “most appealing”
- “not chosen” scores zero
- a reward scores -100 if “least appealing”

For each attribute, scores are calculated based only on those respondents for whom the attribute

was included in the choice set.

As Figure 1 shows, evidently, Malone Gardens customers prefer immediate gratification.

The next step is to show these results visually. Figure 2 shows a chart of descending positives. The larger the contrast between “most appealing” (blue), and “least appealing” (red), the more desirable the attribute. Figure 2 shows the six most desirable rewards.

The next phase of output from Malone Gardens is to estimate the impact if certain packages of options are offered in the loyalty

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Figure 3

Malone Gardens Maximum Difference	Utility
Free Hotel Nights	2.53
Hotel Room Upgrades	2.23
Shopping and Dining	1.50
Dream Vacations	1.28
Experience Getaways	0.94
Complimentary Health Club Privileges	1.05
Premium Merchandise	0.86
Airline Miles	0.72
Spa Or Golf Packages	0.25
Partner Car Rental Privileges	0.16
Bonus Points	-0.05
Reward Planner Services	-0.47

Figure 4

MAXIMUM-DIFFERENCE SIMULATOR		
Malone Gardens Hotel		
		1=Included In The Items
Max Diff Score	Loyalty Benefits	
35.00	Free Hotel Nights	0
60.55	Hotel Room Upgrades	0
37.69	Shopping and Dining	0
34.81	Dream Vacations	0
1.36	Experience Getaways	0
0.87	Complimentary Health Club Privileges	0
0.86	Premium Merchandise	0
-3.32	Airline Miles	0
-6.32	Spa Or Golf Packages	0
-25.77	Partner Car Rental Privileges	0
-30.78	Bonus Points	0
-44.73	Reward Planner Services	0
Likelihood to Join Malone Gardens Priority Club		5.6

Figure 5

MAXIMUM-DIFFERENCE SIMULATOR		
Malone Gardens Hotel		
		1=Included In The Items
Max Diff Score	Loyalty Benefits	
35.00	Free Hotel Nights	1
60.55	Hotel Room Upgrades	1
37.69	Shopping and Dining	0
34.81	Dream Vacations	0
1.36	Experience Getaways	1
0.87	Complimentary Health Club Privileges	0
0.86	Premium Merchandise	0
-3.32	Airline Miles	0
-6.32	Spa Or Golf Packages	0
-25.77	Partner Car Rental Privileges	0
-30.78	Bonus Points	0
-44.73	Reward Planner Services	0
Likelihood to Join Malone Gardens Priority Club		7.3

program. The max-diff data is built perfectly to establish this.

In a discrete choice model, the data is set in an array in which an attribute variable is 1 if the attribute is present in the choice scenario and 0 if not. The dependent variable is 1 if that attribute is chosen, 0 if not. This is a multinomial logit regression model. It is

used to simulate real-world decision outcomes.

In the case of Malone Gardens, the logit model is run and conjoint utilities are constructed. These utility scores are shown in Figure 3. The practical value of the utilities is that they allow Malone Gardens to estimate the bump in loyalty program enrollment with

the addition of one or a combination of loyalty benefits.

We instructed Malone Gardens to ask respondents the likelihood of their signing up to become a Malone Gardens Priority Club member. Malone Gardens then asked the same question after the max-diff choice exercise. As expected, there was a rise in enrollment in the Malone Gardens Priority Club - the gap.

We do not use the gap as a dependent variable in any regression exercise. Rather, the gap provides endpoints for the max-diff regression model, which we now fit between the gaps.

Figure 4 shows the max-diff simulator before the choice exercise. In this "before" scenario, on average, customers are 5.6 out of 10, or 56 percent, more likely, to join the Malone Gardens Priority Club.

Figure 5 shows what happens when Malone Gardens offers a combination of three benefits: free hotel nights, hotel room upgrades and experience getaways.

After incorporating the max-diff results, the likelihood to join Malone Gardens Priority Club has risen to 7.3, or 73 percent, a jump of 17 percent. The max-diff simulator allows Malone Gardens to model literally hundreds of what-if scenarios, simulating any individual or combination of loyalty awards.

Within the context of this max-diff approach, individual-level utilities can be calculated. The max-diff equation produces a logistic regression model. When a respondent's choices are set within the regression model, an odds-ratio for each respondent is created using the formula of $1/(1+e^{-z})$.

For example, if a given respondent's choices are added across the maximum difference questions, then applied to the logistic regression model, the respondent might produce an odds-ratio of .6.

When compared against the maximum likelihood to join Malone Gardens Priority Club (100), this would give the respondent an odds-ratio of $100 \times .6 = 60$, or a 60 percent chance of joining Malone Gardens Priority Club

Figure 6

	Price 1	Price 2	Price 3	Price 4
Shrimp And Chicken Gumbo	\$12.99	\$13.49	\$13.99	\$14.49
Herb-Crusted Filet Of Salmon	\$12.99	\$13.49	\$13.99	\$14.49
Shrimp Scampi	\$14.99	\$15.49	\$15.99	\$16.49
Wasabi-Crusted Ahi Tuna	\$14.99	\$15.49	\$15.99	\$16.49
Old Fashioned Hamburger	\$8.99	\$9.49	\$9.99	\$10.49
Double BBQ Bacon Cheeseburger	\$10.99	\$11.49	\$11.99	\$12.49
Burrito Grande	\$9.99	\$10.49	\$10.99	\$11.49
Teriyaki Chicken	\$12.99	\$13.49	\$13.99	\$14.49
Beef Ribs	\$16.99	\$17.49	\$17.99	\$18.49
Hibachi Steak	\$17.99	\$18.49	\$18.99	\$19.49
Filet Mignon	\$18.99	\$19.49	\$19.99	\$20.49

Figure 7

MAXIMUM-DIFFERENCE SIMULATOR			
Casual-Dining Restaurant			
	Item Included	Item Price	Projected Market Share
Market Model			
Shrimp And Chicken Gumbo	1	\$13.49	16%
Herb-Crusted Filet Of Salmon	1	\$13.49	16%
Shrimp Scampi	1	\$15.49	13%
Double BBQ Bacon Cheeseburger	1	\$11.99	9%
Teriyaki Chicken	1	\$12.99	12%
Beef Ribs	1	\$16.99	24%
Filet Mignon	1	\$19.99	10%

based on the choices made in the max-diff exercise.

Test price sensitivity

In our second example, the client, a casual-dining restaurant, needed to test price sensitivity for 11 main courses, each at four price points. Figure 6 shows the main courses and the price points tested.

Given the large number of attributes, a conventional Grange-Gabor price wheel or discrete model would be unwieldy. Instead, we employed max-diff. Using an orthogonal design, we settled on a 15-run design to determine which attributes would be present in each of 15 choice questions. The order of questions was randomized, and price levels were randomly assigned to each attribute, in each question, for each respondent.

Simply put, respondents saw 15 scenarios with varying menu choices at varying prices and were asked which they would most likely choose and which they would be least likely to choose.

This approach allows us to construct a discrete-choice model similar to the logit model described above. We can construct utilities for each item (though not indi-

vidual conjoint utilities) and a price function, and then build a simulator to model item demand (by exponentiating the utility of all items in the market, then dividing by the individual items).

Figure 7 shows a simulator that contains seven menu items at varying price points.

Examining the outcome, the restaurant's management can see that

beef ribs, at their lowest price point, have a demand of 24 percent, and that pricing the double BBQ bacon cheeseburger above \$11 will drive demand down below 10 percent.

Using latent-class analysis, or cluster analysis, respondents could be grouped into segments. That is, by clustering different groups, we can see which prefer steaks and chops, vs. seafood, vs. trendier dishes such as teriyaki chicken.

Simple and effective

There are many applications for the accurate measurement of choice modeling. Max-diff scaling is not new but is emerging as a simple and effective option for choice models. It can be used to assess the extendibility of a brand's loyalty strength and brand equity, to refine a brand's communication efforts by identifying segments in which a brand's image is strong, and/or as a way of monitoring the competition. Whatever its application, this method of choice measurement is a sophisticated tool that helps keep marketers one step ahead. | Q

More on max-diff

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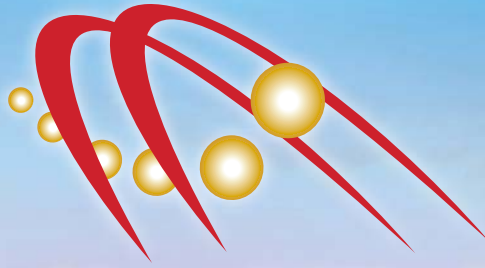
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How to take your in-house research practices to the next level

Company and marketing executives want to see greater marketplace impact from research, while researchers want to be the most sought-after providers of advice and counsel. The Market Research

Executive Board (MREB) reports that 69 percent of senior executives want research to be a strategic partner but only 29 percent of them currently view research as such. Furthermore, execs who view research as a strategic partner are much more likely to have changed decisions based on research than those who view research as an analytic resource (57 percent vs. 33 percent).

(Source: MREB Business Alignment Survey, 2008.)

Our firm has identified 10 key performance indicators (KPIs) that we feel

can help research teams within today's corporations increase their internal standing and achieve strategic, consultative relevance:

Editor's note: Ian Lewis is director, research transformation consulting practice, at Cambiar LLC, a research consulting firm. Based in Weston, Conn., he can be reached at ian@consultcambiar.com. To view this article online, enter article ID 20100102 at quirks.com/articles.

snapshot

Using the 10 key performance indicators detailed here, client-side researchers can install a continuous improvement process to add rigor and impact to their department's practices.

1. Driven by impact
2. Brings leadership to strategic priorities
3. Creates departmental intellectual property
4. Recognized as a business partner
5. Innovates
6. Integrates and collaborates
7. Develops rich consumer and market insights
8. Communicates for impact
9. Optimizes internal and external sourcing
10. Continually raises the bar

1. Driven by impact

Market research professionals typically spend their early years mastering the technical skills needed to design, execute and analyze a project. The focus is the project; the end point is a finished report or PowerPoint deck. Success is defined by a project well-executed - a ques-

tionnaire that the client is happy with, fieldwork that's done on time and on budget, a report or presentation that often summarizes "all the news that's fit to print." Then the researcher moves on to his or her next project. Performance reviews focus on quality of project management skills.

Contrast this with what the company's senior management wants from research. The company is investing substantial dollars in research, so it wants to see marketplace impact as a result of its investment. And senior management's time is increasingly precious, so they just want to know the key insights and how the company should act on the insights. If there is little or no marketplace impact as a result of the research investment, why should they keep investing?

Ideally the research department

would be able to demonstrate ROI for the function to the CFO's satisfaction. In our experience, analysis to determine ROI is often very nebulous and we have preferred to rely on client feedback in addition to a departmental log tracking marketplace impact.

Marketplace impact doesn't happen automatically from identifying insights. Insights must be integrated with business economics and organizational strengths and weaknesses, then communicated and subsequently acted upon by the appropriate internal function.

Research departments need to provide an environment in which marketplace impact is integral to the department's vision and mission, an environment that makes provoking impact part of the research culture and that rewards impact. Departments also need to provide



support in the form of coaching, mentoring and training. Researchers must be oriented to the need for impact from the beginning of their careers. When hiring, it is critical to select researchers who will have both the mind-set and the ability to develop the personal and professional skills needed to create impact. Finally, research departments must document and communicate their marketplace impact.

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2. Brings leadership to strategic priorities

Researchers often complain that they spend too much time and money researching tactical issues while major strategic issues struggle to get budget. When this happens, it speaks “opportunity” and is a clear indication that research programs and budgets are not reviewed at a high enough level in the organization. It may be that the research budget is controlled by a brand-level marketing person and that the rolled-up departmental research budget is never reviewed with senior management. Or it may be that senior management doesn’t believe (or isn’t aware) that research can help with the major strategic issues.

This four-step research strategic plan process will create thought leadership opportunities for research:

Step 1: Identify the major strategic issues facing the company/brand.

Step 2: Evaluate the current level of knowledge about these issues company-wide and the key knowledge gaps.

Step 3: Build a research strategic plan - a program addressing the key knowledge gaps for the strategic issues - and review it with clients, including senior management, to gain their commitment. If the company is highly decentralized, the idea of company-wide research planning will need to be sold to corporate senior management. It may require addressing the best funding mechanism for research (e.g., within brands or SBUs vs. centrally, or at least having central funding for major strategic issues).

Step 4: Anticipate and adjust to changing strategic priorities. (Remember Churchill: “Plans are of little importance, but planning is essential.”)

3. Creates departmental intellectual property

Research needs to be proactive and provocative, seeking opportunities to bring thought leadership to major strategic issues. One mechanism is for research departments to identify a small number of topics

(usually one or two) for which they can develop intellectual property for the company’s benefit; this can then be used to surprise and delight senior management. It also provides research an opportunity to showcase that it is future-focused (note that a future-focus isn’t intended to be limited to just this KPI).

This “above the brand” knowledge can be obtained by synthesizing internal and external information that is currently available but has not been leveraged. It is best to also establish a discretionary research budget that the department can use to create its own intellectual property.

4. Recognized as a business partner

The research relationship with clients runs all the way from being an internal vendor to a capable resource to a trusted advisor to a partner. One definition for a true partner is the first person you call when you have a problem and the last person you call before making a decision. Being simply an internal vendor is unacceptable; being a capable resource limits you to a reactive role. Today’s research departments must attain trusted advisor or partner status in order to drive impact. Research departments must achieve these consultative relationships with clients and with top company executives.

Attaining the desired relationship requires the researcher to have the right mind-set, the right collection of personal and professional capabilities, an understanding of the business and of the company’s capabilities, a way of working that fosters identification of business solutions from research, and the ability to get solutions implemented. The opportunity to develop trusted advisor or partner status will vary by client, so there needs to be client-specific planning. Coaching, mentoring and training are needed to help researchers become successful consultants.

5. Innovates

In an environment where resources are scarce and everyone is working

long hours just to complete assignments, it is challenging to find the mental space, time and resources to innovate. In our experience, it is difficult to get senior staff's attention to explore innovative approaches because they are so immersed in their day-to-day assignments. In addition, innovation is challenging for risk-averse researchers. However, if the research department wants to be seen as proactive and a leader it must innovate.

Innovation must co-exist with best practices. Best practices are extremely valuable and increase in value over time, but there must be openness to considering alternatives for which it may not be possible to bridge from the old to the new. A future-focused research department will have a culture that is open to considering disruptive change. In our experience, researchers can be more risk-averse than their clients.

Following these steps will keep a focus on and build recognition for innovation:

- Build innovation into goals for senior research staff. Don't delegate innovation to just one person.
- Have a regular, ongoing program for the department to be exposed to innovative approaches.
- If there are different research groups by SBU, assign innovation areas to different groups according to fit with SBU business objectives.
- Identify and partner with clients who are open to utilizing innovative approaches.
- Reward researchers who innovate.
- Get management commitment to a discretionary budget.
- Communicate innovation accomplishments to the organization.

6. Integrates and collaborates

Researchers have traditionally focused on projects, with skills development targeted to becoming self-sufficient in handling projects. Researchers tend to "own" projects, and in our experience do not usually reach out to

others for input when developing insights. Timelines are typically set for the project without consideration for integrating information that is external to the project. The researcher may also not be well-versed in information from sources such as consumer trends services, studies for other brands in the category, studies from other countries, mining of consumer conversations, industry studies, etc. Complicating things further, in our experience many researchers don't enjoy taking time to sift through other sources. Hence they tend not to focus on integrating multiple sources of knowledge, missing an opportunity for richer insights. However, researchers enjoy the opportunity to add value by participating in collaboration sessions; making collaboration part of the culture will have a substantial payoff.

Challenges to address in order to enhance collaboration and leveraging multiple knowledge sources include:

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When travelling, Greg has time to do IT related surveys on his PDA.

Arnaldo wants to have an up-to-date account of the rewards he's earned taking surveys.

Anna uses surveys to express herself.

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Training and orientation.

Researchers need training so that they evolve to become consultants. They still need to learn project skills but they need to learn a broader perspective - where the end game is creating marketplace impact from insights, and knowledge from projects and/or other sources is the fuel for discovering insights.

Collaboration. Working collaboratively within the research department can be a powerful asset.

Other colleagues may be well-versed in information sources that could be helpful for a project or bring a different perspective. Working collaboratively needs to become part of the research department culture, to better leverage multiple knowledge sources and to develop richer insights.

Time and resource management.

There may be an opportunity to leverage outsourcing and/or off-shoring for integration of additional knowledge sources. Priorities need to be set so that additional resources are used where potential marketplace impact is high.

7. Develops rich consumer and market insights

What is an insight and how does research increase insight productivity? We like a definition that includes discovery together with marketplace impact: "Insight is new knowledge that has the potential to create significant marketplace impact."

The toolkit for identifying insights has expanded in recent years. Online research capabilities have made segmentation and other quantitative techniques much more affordable, and enabled virtual shopping capabilities. Ethnographic research has become mainstream. Neuroscience, eye-tracking and facial-coding methodologies are evolving. Hosted online panel communities provide an opportunity for dialogue with consumers, and among consumers, over time. Listening to social media is gaining importance.

The challenge today is in unearthing insights that lead to competitive advantage, that can be leveraged to trigger an emotional consumer response and that ultimately provide the opportunity for significant marketplace impact.

It would be unwise to suggest that a simple formula exists to achieve high productivity for generating rich insights, but these pointers will help:

- A curious mind is an important starting point. If your research staff lacks curiosity, you have a problem.
- Research departments must create environments that support

creativity, use of judgment and risk-taking; this is more conducive to generating rich insights.

- Put processes in place that facilitate collaboration with colleagues to develop richer insights. "Going it alone" is sub-optimal.
- Integrate knowledge from a range of sources to increase the chances for identifying rich insights.
- Focus energy on insight-generation that can have significant business impact.
- Building insight-generation into goals and making it part of ongoing, informal feedback reinforces the importance of the process.

8. Communicates for impact

The richest insight in the world doesn't add value unless some action is taken. Research needs to take responsibility for making change happen as a result of insight development. Communicating for impact is critical. MREB annual themes in recent years have included "driving insight adoption" and "from insight to action," underlining the importance of this.

In my corporate and agency lives, it took a long time just to get our researchers to stop putting a methodology chart at the beginning of a presentation, and to get them to believe that they didn't have to show everything they learned. The job of the presentation is to create impact - period. Anything else is superfluous.

The following pointers will help create impact:

- Tell a story with your presentation, and tell it succinctly.
- Leverage visual storytelling, incorporating video where possible.
- Know your audience and their ingoing beliefs. Address potential minefields individually before delivering the presentation.
- Your audience wants to know what they should do, not what you did.
- Your job doesn't end when the presentation is given. Take responsibility for making action happen.

9. Optimizes internal and external sourcing

A key strength for research departments is that the available resources

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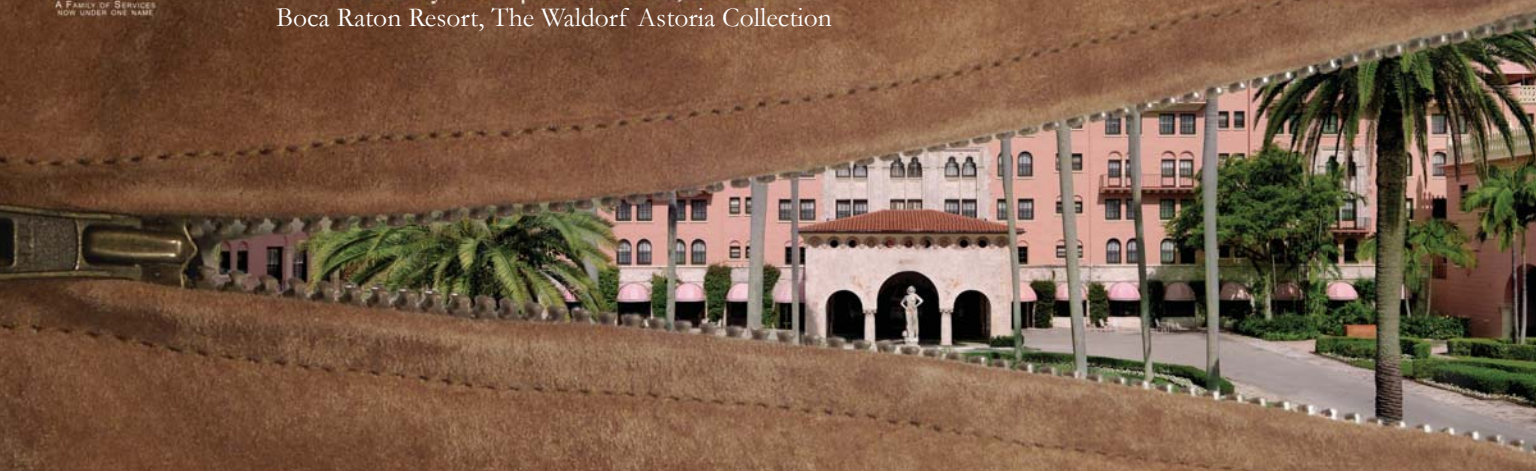
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go well beyond the internal staff, and now is a good time to reassess the best combination of internal and external sources in order to develop the ideal research capability.

Research departments have traditionally outsourced to “suppliers,” a term that – to the increasing army of procurement officers – unfortunately places market research companies in the same bucket as office products firms and other commodity pur-

veyors. In some client companies, cost pressures placed on suppliers have inhibited innovation and threatened quality.

Offshoring has been another recent development, providing the opportunity to either reduce costs or undertake assignments that weren’t possible with stretched internal staff.

In recent years consulting companies such as McKinsey have been increasingly retained for major strategic assignments that include a research component. While research suppliers (who lose lucrative business) and client researchers (who don’t make the hiring decision and usually don’t lead the assignment) are often unhappy about consulting companies being retained, the good news is that top management will pay for research that it believes will have a major impact. The opportunity is for research departments to earn their place as consultants to top management.

Factors to consider in developing the optimal internal and external sourcing plan include:

- What capabilities and knowledge must be retained internally?
- What adjustments, if any, are needed to the existing department structure and talent pool?
- What is the right partnering model with market research suppliers?
- Does the department have the best market research suppliers for its needs?
- How is offshoring best utilized?
- How can client self-service be expanded for low value-add services?
- What can the department stop doing?

10. Continually raises the bar

As the saying goes, “What gets measured gets managed,” so a key component is a performance measurement and feedback process. Tied to this is goal-setting. All of this must be designed to fit with the desired transformation for the research department.

Here are some things that we have found helpful:

- Look for “quick hits” to demonstrate to staff and management that the transformation is making progress.
- Set up an “impact log” for researchers to post successes with creating marketplace impact; use this to communicate successes with senior management. The log is also a great mechanism to share successes with research staff.
- Discuss progress toward transformation goals frequently, individually and with the department – don’t wait for the annual review!
- Build mini-360 evaluations into the annual performance appraisal process. Have confidential conversations about senior staff with their direct reports, key clients and sometimes with other colleagues and suppliers, prior to the performance discussion. All managers should be required to follow this process.
- Client surveys about key aspects of department performance are helpful initially but can become repetitive and should be replaced by one-on-one conversations.
- When setting goals relating to consulting relationships, select key clients and client-specific goals (e.g., “Achieve trusted advisor status with Marketing V.P. Joe Smith by mid-2010.”).
- Provide coaching, mentoring and training support.

We made progress

When I joined my previous company, the expectations from the research department were fairly low. We began the journey from number-crunchers to internal consultants, utilizing many of the tips given in this article. And we got some outside help from an experienced management consultant, who made us feel quite uncomfortable about the journey ahead. We made progress, and client expectations rose. The better we became the higher the expectations became. I believe this is axiomatic, and that it is essential to have a continuous improvement process in place. | Q

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

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

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



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

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

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

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

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How to transform market research from vulnerable to valuable

Marketing research (MR) departments have been especially hard hit in this recession. Even as we begin to see some signs of recovery, we are finding that our ranks and coffers are refilled more slowly than other departments. Unfortunately – and it really pains us to say this after our decades as researchers – our vulnerability may be our own fault.

A 2007 survey by the Metrus Group and the American Society for Quality (ASQ) found that when internal customers rated 13 of their various support functions on performance (such as quality, HR, legal, IT, finance and marketing), marketing was second from the bottom. Fewer than 40 percent of respondents said they were satisfied with marketing, compared to nearly 70 percent for the top-rated group (quality). Not only that, but since the survey was first done in 1993, marketing showed the smallest improvement (only 5 percentage points compared to about 25 percent for communications/PR and customer service).

Although the Metrus/ASQ study did not distinguish between marketing and MR, we have been studying the performance of MR functions for years (we have completed over 100 in-depth interviews with top researchers and their clients) and have found a similar situation. Only 30 percent of our internal clients give MR top (A to A-) ratings, and 10 percent flatly say we “fail.” And yet we researchers think we are doing well – with nearly 70 percent of us rating ourselves B to A.

How is it possible for people who do research to be so out of touch with our clients? Surprisingly, very few of us actually survey our own clients about the experience of working with MR. We rely on the absence of obvious complaints or the quantity of our workload to tell ourselves that we must be doing okay – which is certainly not something we would ever recommend to our clients as a best practice.

No wonder marketing researchers have been so vulnerable during this recession! No wonder so many MR departments have laid off staff and cut budgets.

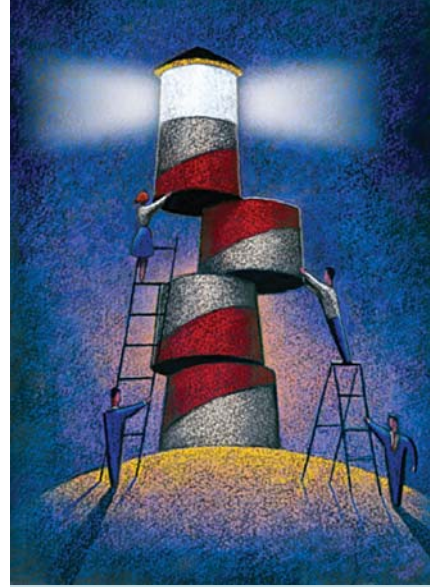
snapshot

The authors draw from in-depth interviews with top researchers to provide concrete steps that MR departments can take to raise their internal profile.

How we can improve

So what can market researchers do to take our groups from vulnerable to invaluable? Here’s what our studies show about what we are doing well and how we can improve.

First, we find that most clients think their research groups are doing the basics well. By that we mean that clients believe researchers are using the right methodologies, asking the questions in the right ways, surveying



By Diane Schmalensee and Dawn Lesh

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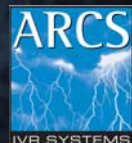
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the right people and analyzing the data in the right way. Doing the basics well might be called a “satisfier,” something that we have to do to avoid getting very low ratings but not sufficient to earn us top ratings. For example, in the rare cases where clients question the quality of our work, they tend to hire outside consultants, make decisions without our input or simply fire the head of MR and start again. But simply doing the basics well is not enough to earn MR groups top ratings.

This leads to our second finding: There are two things that we researchers have to do a lot better if we want to become valuable to our clients:

First, manage internal relationships. We are not seen as partners to our clients today. We are not perceived as working with our clients to help them succeed and achieve their business goals.

Second, quantify and promote the value of MR. We do not market or prove the value of our work.

Let’s look at each of these in turn to see what our clients want from us and how some highly-rated MR departments have accomplished the above.

Know how clients define MR success

Many successful MR groups begin

by knowing what their clients want and how to make the clients appear successful to others in the firm. For instance, although not all clients want to develop relationships with researchers (a very few clients say they just want “order takers”), most clients want us to act like consultants to them when it comes to things like: giving an early heads-up if the data are unexpected or negative, working side-by-side with the clients in developing recommendations that will actually be put into action or helping the clients navigate internal minefields if the recommendations call for a change in the status quo. For example, one MR head told us he spends about one-third of his time talking to clients about their needs. He has some formal meetings where he asks about what keeps them up at night and how their needs will change over time and he uses informal meetings and lunches to learn what they think will help them advance in the firm.

Know our industry as well as our clients do

While many researchers actively study the newest research methods and trends, fewer of us actively study the respective industries in which we work. For instance, how many of us who work in financial services attend industry conferences, read financial

services journals or even study the annual reports of our competitor financial firms? We are the keepers of so much primary and secondary data that we often think we know all we need to know. But, unless we are as familiar with our industry – why some firms are growing or just entering our market, what new economic or regulatory threats our industry faces, or what new technologies will mean for our industry – our clients cannot take us as seriously as we would like. One researcher told us how powerfully she moved ahead when she began to attend industry conferences. She got to travel with her internal clients (a great chance to build personal relationships) and build credibility for her research recommendations by tying them to industry as well as survey data.

Align our MR goals with company goals

It sounds so obvious, but a surprising number of MR groups told us that their goals are actually in conflict with company or other department goals. For instance, the MR group in one automobile company was judged on the accuracy of its predictions of customer demand for new models while the R&D and engineering groups were judged on the number of new models they introduced, regardless of their sales. No wonder R&D and engineering found MR’s input annoying. Those of us who are lucky work in organizations where the strategy and goals are clear. The rest have to study company culture to learn how to align MR goals.

Prove and communicate

So how can we quantify and promote the value of MR? We must prove and communicate the impact of our contributions.

Spend wisely, considering the value of the research and its return

Financial people usually discuss the ROI of any major budget item, and successful MR groups often do the same. They set budgets for new research work based on the anticipated financial value to the firm. For example, a project for a minor product usually has a lower ROI than a

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project for the firm's major product. Or, a project that deals with a topic that is strategically vital to the firm (or the firm's CEO) usually has a higher ROI than one that deals with a less important subject. Not only can ROI be assessed before the work begins to determine how much to spend on a project (or even whether to drop a project entirely), it can be used after the project is done to define the actual dollars and cents the MR group's work contributed to the firm. We have seen some MR heads calculate their department's annual financial contributions to the firm compared to MR costs to demonstrate the payoff of conducting research.

Market MR

Marketers are always looking for ways to promote their products or services, and we researchers can do the same for our departments. While we may do dozens of projects each year, our clients may be aware only of what we do directly for them. They likely could benefit from the work we do for someone else, but not if we don't market the work (on our intranet, via electronic newsletters or even in annual reports and presentations to top management). One head of MR created a quarterly "marketing landscape" report that incorporated industry data with MR information and highlights of recent work. This became so popular that it had to be updated monthly, and different levels of access were provided depending on the viewers' rank or role in the firm.

Most needed

Each MR group is starting from a different place and needs to assess what is most needed in its unique situation. However, when MR heads ask us for advice on how to make their departments more valuable, here's what we usually say.

- Do you know what your clients think of you and how well you are meeting their needs? Do you know how they define their own success? Do you know the threats and opportunities facing your industry? If not, start with this. Hold personal meetings with top managers and survey other clients to find out

where you are weak and strong and to guide your next steps. If you can make your clients or firms successful then you will share in that success.

- Do you know the value of what your MR group has produced for the organization? Can you begin by simply listing all the work completed in the last year, what it revealed and how this information was or was not used to increase company profits? Do you make it a priority to communicate proactively with your clients about what MR



has learned and its significance to your firm? If you know the answers to these questions, then you can summarize and market your contributions effectively.

Grow and thrive

Taking MR from vulnerable to invaluable is possible but requires work. It is up to us researchers to make our clients successful and to prove the value of our contributions if we want to ensure that our departments grow and thrive. | Q

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Evaluating the silent salesman

Why your packaging should be researched as much as (or more than) your advertising

Packaging has been personified in a number of ways: “Your package is your silent salesman who never sleeps.” “Your package is your on-shelf ambassador.” “Your package is your ever-present face to the public, particularly in the absence of advertising.”

Minus the rhetoric, the average package is typically in view for several years - far longer than most ad campaigns. Thus, now more than ever, the creation and evaluation of package alternatives deserves at least as much objective consideration and scrutiny as advertising.

Over the past few years, marketing executives have been increasingly challenged to deliver good results for their brands. The impact and effectiveness of advertising, always important, has been fractionated by a proliferation of new media. The current recessionary economy has added pressures to the bottom line, stimulating budget cuts. In fact, many companies, particularly those marketing consumer durables, have launched or supported new products with little or no consumer advertising - relying upon shelf presence, in-store displays and/or other collateral materials.

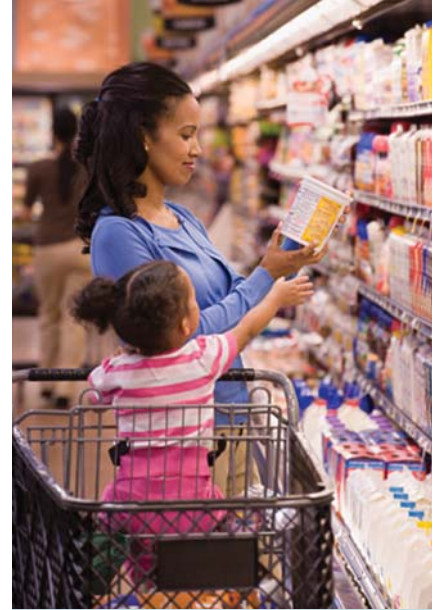
What has remained a constant is the need for communicative packaging - packaging that attracts attention in a cluttered, competitive environment, delivers a meaningful message and promotes appropriate imagery. And, beyond positioning a brand vis-à-vis competition, packaging is called upon to differentiate alternative products within a brand line.

For brands that are consistently and actively advertised, it used to be sufficient for a package to reinforce the advertising message and to simply be visible. That premise, of course, was predicated on the notion that the package was visible during the advertising.

Today, perhaps more than ever before, packaging may be forced

to serve as the entire communications program for a brand. In fact, for some smaller brands, packaging may be the entire marketing program - the only means for a product to compete with advertised and promoted brands.

Yet, and despite the increased reliance that some companies have knowingly placed on their packaging, many companies are still conducting little or no research on their packages. Some, at best, conduct a couple of focus groups after new packaging has been created to make sure that the proposed packaging is acceptable or



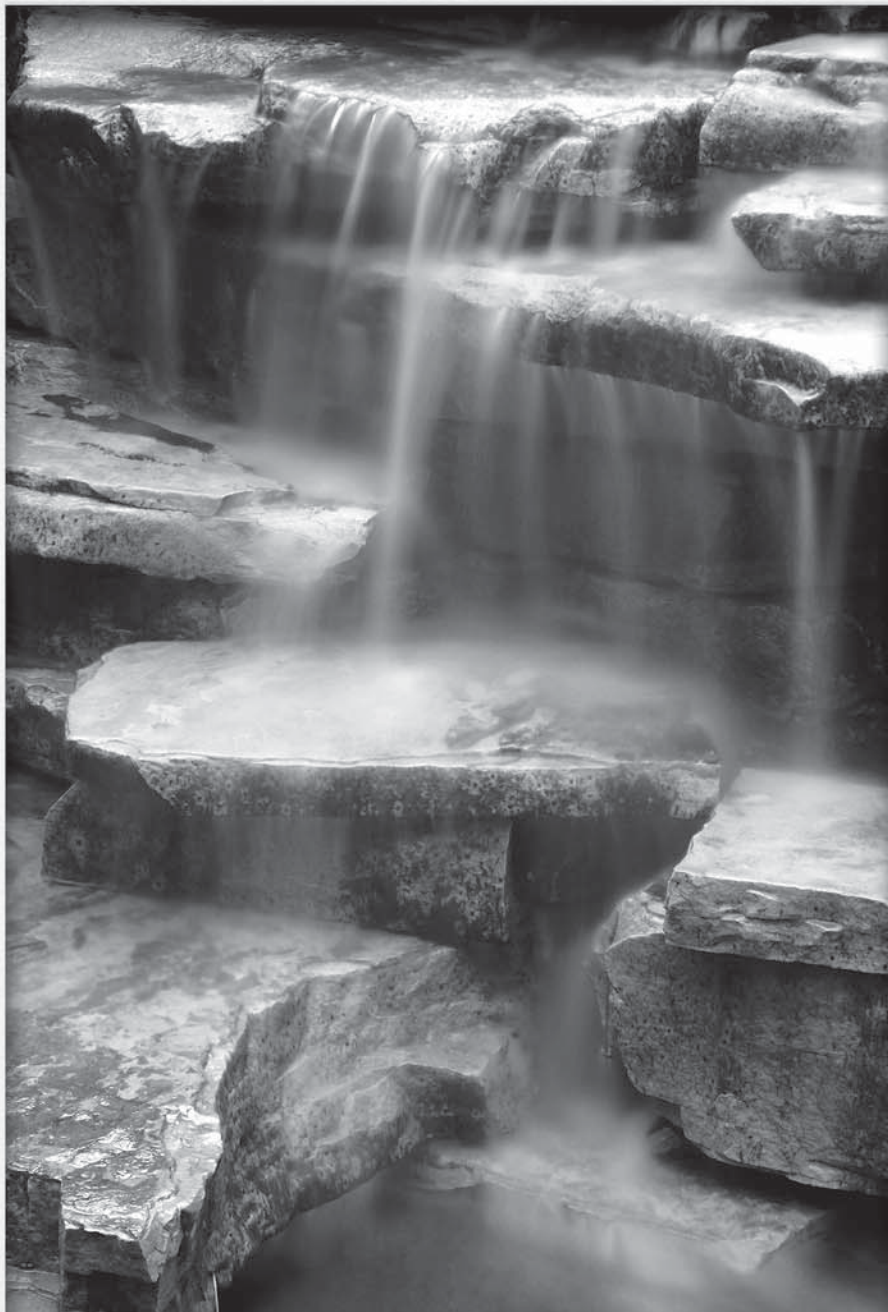
By Norman B. Leferman

snapshot

How much do you know about your packaging? In addition to evaluating prototypes, pre-design research is essential to understanding how consumers shop your category, how they view competitors' packaging and what your brand must do to stand out from the crowd.

Editor's note: Norman B. Leferman is president of Leferman Associates Inc., a Stamford, Conn., research firm. He can be reached at 203-327-1128 or at norm@lefermanassociates.com. To view this article online, enter article ID 20100104 at quirks.com/articles.

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And, more often than not, the research that is conducted is limited to a study of front-panel graphic elements (e.g., labels) with little or no regard for structures and materials. Without question, though, the shape, structure and materials used for a package can contribute to communications as much or more than the label design.

Stories abound about how the then-unique shape of the Absolut bottle contributed to the successful launch of that brand and its premium positioning. In fact, the Absolut bottle was the dominant factor in that brand's advertising for many years. Great care was taken as Bertolli decided to switch from glass to plastic bottles for its premium-priced olive oils to ensure that consumers would not question whether the quality of the oil might have been sacrificed and, as a result, whether the switch to plastic would harm the image of the brand. Conair and others recognized long ago the need for die-cut windows in their boxes to allow consumers an opportunity to see/touch the appliances contained within.

Same degree of planning

We believe that the same degree of planning and consideration should go into the development of packaging as that traditionally devoted to advertising research, with heavy emphasis on pre-design research.

Before anyone devotes much creative time to designing a package, care should be taken to understand how consumers shop the category and use packaging in their decision process. Importantly, even though some of the information categories might be similar, one should not rely on advertising message research to drive package design.

Pre-design research for packaging should identify and assess:

How people shop the category.

What do they look for first – a particular brand, a particular attribute/benefit, a size, a price point, etc.? What is their second order of priority? This should not only influence the relative size and placement of packaging elements but also impact

the development of merchandising systems (e.g., how an entire category should be displayed and differentiated).

Key attributes/benefits that impact on product selection.

What is the relative importance placed on taste, texture, durability, ease of use, safety, number of components in the package and, in turn, which characteristics are deserving of front-panel recognition? Moreover, beyond simply knowing the right words and phrases, it is important for packaging research to identify the colors, textures and icons that may be used to communicate those characteristics without words that can clutter the front panel.

How current and competitive packaging are regarded. Apart from the basics of knowing brand image and acceptability, it is incumbent upon package researchers to identify and fully comprehend current equity values. What current packaging elements (color, logo, typography, structure, etc.) must be retained to maintain communications with the current customer franchise? What elements should be modified/changed entirely to stimulate new/renewed interest among former users and/or non-triers?

Costly change

The need for studying equity values cannot be overstated. The recent decision of Tropicana to bring back its former package graphics after a reportedly costly change for its entire product line emphasizes the need to maintain key elements or risk the ire of current customers. This is no different than changing the formula for a product (e.g., Coca-Cola) without having consulted loyal customers.

Sometimes, though, the need for preserving specific package elements is discovered in a more subtle fashion than in the answer to a direct research question. For example, despite the fact that some aspects of its research had suggested that the owl icon on its package was a meaningless and redundant communicator, when it was time to update packaging for the Wise line of potato chips, management decided to keep the owl on its packages,

albeit in a smaller form, because it gave loyal customers confidence that the product was not being changed. Management of Macco adhesives decided to maintain a cowgirl icon on packaging for its Liquid Nails line of adhesives after learning that that single element made it easy for some contractors to send their less well-educated (and/or non-native-English-speaking) laborers into a store to pick up additional tubes of product. All they had to do was find the product with the cute girl on the tube.

Guide and shape

Once the creative process has begun, follow-up phases of research are valuable to help guide and shape development and, importantly, to validate that the proposed packaging actually can fulfill objectives, including: intermediate phase(s) of research to examine response to proposed alternatives and/or package elements and to suggest refinements and; post-design research to diagnose response to final candidates, pick a “winner” and offer suggestions for optimizing that selection.

In general, a combination of qualitative and quantitative modalities are employed to study these issues. Since objectives, target audiences and competitive environments can vary greatly, there is no one cookie-cutter approach that should be followed. Depending upon the category and our objectives, we have used individual depth interviews, triads or full focus groups for pre-design research. And, in some cases, we have used the Internet for quantification.

The first priority, though, for choosing a methodology is to ensure that candidates and competitors are assessed in a cluttered environment – simulating, as much as possible, what consumers would see and feel in a typical shopping venue. To the extent that it is very complicated and/or costly to prepare enough test packages to fill shelves in a working store and wait for real consumers to shop the category, we tend to rely on simulations – often using life-sized photographic representations in a research facility to which target market consumers have been

pre-recruited. In general, time-controlled stimuli (e.g., slides shown at a fraction of a second) afford an effective means of measuring impact while follow-up forced exposures let you intensively assess communication and image values.

In our view, Web-based studies are not recommended for many phases of packaging research. Most home computer screens are not nearly large enough for a consumer to see, read and evaluate alternative packages in a competitive display. While an online study may be perfectly acceptable for measuring the communication values of a single alternative on a forced-exposure basis, it does not allow the assessment of clutter effects. Research via the Internet also does not provide a means for examining consumer response to tactile characteristics (e.g., materials/textures) of a package beyond its shape.

Here are several sets of questions that marketing executives should ask about their current or future packaging. All can be addressed in reasonably cost-efficient research modalities.

When potential purchasers are shopping the category, do they see you? What brand or brands are most visible?

In the blink of an eye, what can they learn about your product? What do they sense about your brand?

Once drawn to look at your package, what are the main attributes/benefits expected from your product? Does the package communicate the intended positioning?

Is the package easy to read? Is it too cluttered? Does it clearly convey the contents/components that are included?

Is the principal display panel compelling enough to encourage consumers to pick up the package? Will they be motivated to read other panels to find other information that is important to them?

Does the principal display panel differentiate your product from those of competitors? Are the perceived differences important, compelling and believable?

Does the packaging make it easy for shoppers to differentiate among your own alternatives (e.g., sizes, flavors, power ratings, features)? Is it easy for consumers to see that you, in fact, offer alternatives?

What image does the packaging

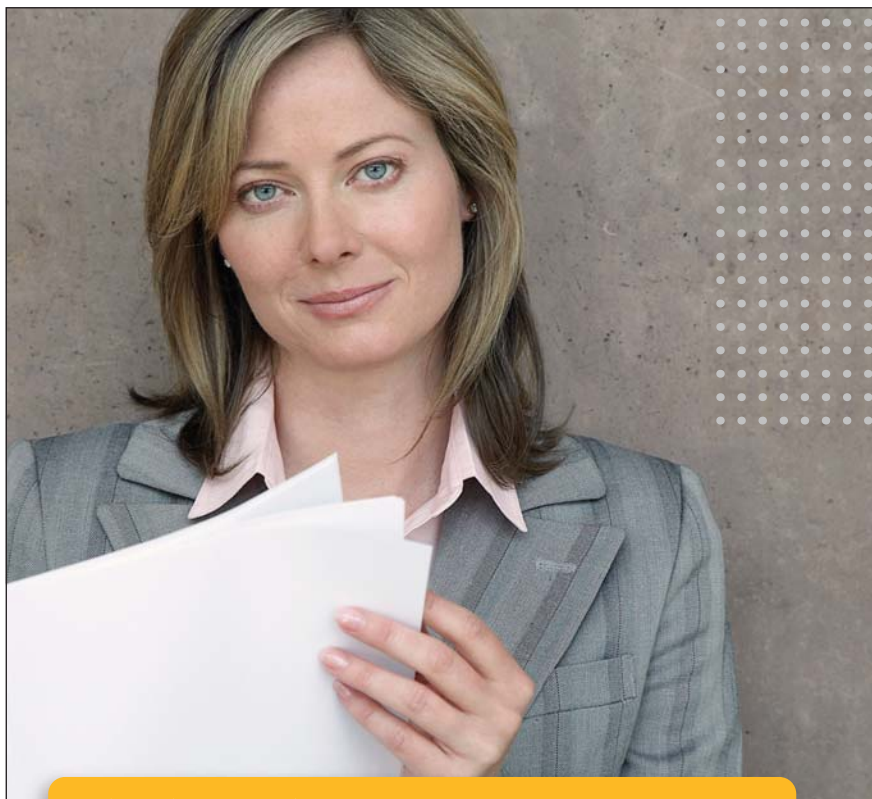
foster about your brand and/or the types of people who might use it? Does the package imply that this product is “for people like me”?

Do the physical package structure and materials provide a sufficient view of the product? Will shoppers want/need to open the package in the store to get a better look at the product?

Catch attention

Take a step back. Assume that no one knows your product, that the

shopper is just entering the category and has never seen (and may never see) any advertising for your product. Can your package catch a shopper’s attention and interrupt the planned behavior of someone who was going to buy their regular brand? Will your package sell itself off the shelf or will it sit there collecting dust? Regardless of your expenditures for advertising or PR, researching your package will be a wise investment. | Q



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Winning at the two moments of truth

Insights and implications for packaging research

Recently, marketers have become more focused on the power of design – and far more aware of the power of packaging to impact sales. However, as companies have acted more aggressively in changing the appearance of their brands, we’ve also seen several high-profile mistakes, most notably the Tropicana disaster, in which a new packaging system led to double-digit sales declines. This has led some clients to ask if there is a formula for leveraging the power of design while minimizing its risks.

With this issue in mind, our firm, Perception Research Services (PRS), recently reviewed our packaging research database (across thousands of studies) to see what it could teach us about the primary factors driving sales gains. This exercise uncovered several interesting insights, with definite implications for both packaging design and shopper research.

Difficult to come by

First and foremost, our analysis revealed that true wins (i.e., major sales gains from packaging changes) are quite difficult to come by. Across studies, while nearly half of the new (i.e., proposed) packaging systems outperformed current packaging in terms of overall packaging effectiveness (as measured by the PRS Packaging Performance Index), only about 10 percent of new systems drove significantly more shoppers to purchase the brand from shelf.

Thus, while a new packaging system might be more appealing or perhaps stronger than a current one in supporting core brand imagery, these advantages were not very likely to directly impact shopping patterns and translate into sales. In addition, we found that it is far easier to damage a brand than to grow it via packaging. In fact, it’s about twice as likely, as approximately

20 percent of new packaging systems drove declines in purchases from the shelf (as opposed to the 10 percent driving significant sales increases).

Of course, a natural next step was to take a closer look at the major success stories, in order to identify the performance measures and design elements that most highly correlated with success. This uncovered a very intuitive, yet powerful, reality: To significantly drive sales, new packaging systems need to have a

snapshot

Drawing from real-world successes and failures, this article argues that on the shelf and in the home are two proving grounds for innovative packaging designs and explores how research can help enhance the odds of victory.



By Scott Young

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powerful impact at one of the two moments of truth – on the shelf or in the home.

Single strongest driver

Across brands and categories, we confirmed that increases in shelf visibility were the single strongest driver of sales increases. While we've long known that "unseen is unsold," this finding goes a step further: It confirms that if a new design system can drive a higher percentage of shoppers to engage with a brand at shelf, it is highly likely to drive purchase. In fact, through studies conducted in collaboration with Wharton and INSEAD, we've found that reexamination (getting shoppers to take a second look at a brand, as measured via eye-tracking) is an even more powerful predictor of purchase. When shoppers take a second look they are actually reconsidering a brand (giving it a second chance) and bringing it into their consideration set.

Of course, this leads us one

step further, to the question of what creates shelf visibility and leads to a second look. Put simply, the one-word answer is contrast. In other words, visibility is not the result of a shopper's conscious decision ("I want to look at that brand."), but instead a physiological process, driven by the contrast between a brand and its competitors on shelf. Literally, it is what catches the eye.

So what creates contrast? Our analysis revealed three primary drivers: color blocking, unique shapes/structures and strong brand identity (a bold logo, visual, etc.). In fact, across brands, cultures and countries, we've seen that revolutionary new packaging structures have a far greater likelihood (than graphics-only changes) to create disruption at the shelf, lead shoppers to take a second look at a brand they previously ignored, and, ultimately, to change their behavior.

Interestingly, we've found that declines are not the inverse

or mirror image of successes but they are also driven by on-shelf performance. Rather than shelf visibility, we found that declines in shopability are the factor most consistently linked to drops in sales. Specifically, we've seen that when shoppers are confused or frustrated at the shelf, it typically takes one of two forms: brand hesitation ("Is this still my brand?") or product findability ("Where is my product?").

One or both of these factors create enough hesitation for shoppers to revert to a safer choice (i.e., a competitive brand) and leave the brand, in some cases permanently.

Retail realities

New packaging structures can also be powerful in linking to an important and oft-overlooked aspect of shelf presence: Packaging rarely appears as we'd like it to at retail. Instead, packs are frequently knocked over, facing sideways or backwards, partially obstructed, scrunched up and

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dented or compromised by poor lighting or careless stocking. These retail realities are often the result of packaging systems or structures that don't translate well to the retail environment.

Consider rounded containers, such as those used for many beverages. They may look great in a conference room (or perhaps when viewed in a focus group) when they face directly forward. In-store, however, these containers are often turned off-center, which can greatly compromise their shelf impact. Bagged products can also be a challenge because they are likely to sag or get scrunched on the shelf, which can impact quality perceptions and/or make key copy points unreadable.

When marketers invest in packaging structures that limit retail risks and maximize opportunities, we often see a positive return. For example, the new square jar for Kraft mayonnaise makes it very likely that the front label will face outward on shelf - thus creating a clear competitive advantage.

Finally, we've continually seen that packaging systems can break through clutter on-shelf by more directly speaking to shoppers' underlying priorities and thought processes. In many categories, we find a disconnect at the shelf, between the shopper's mind-set, which is often focused on users and usage occasions ("Who is this product for? When would I use it?") and packaging communication, which typically emphasizes ingredients, forms and features (diet, organic, liquid, gel, etc.).

For new products, the opportunity often lies in defying convention and using packaging to speak to an underlying need and/or a specific usage occasion. One excellent example is Nabisco's 100 Calorie Packs, which quickly built a \$100 million brand by using packaging innovation to provide portion control and to extend brands into new usage occasions (school lunches, etc.).

There is a danger

When most marketers consider the

second moment of truth during product usage, thoughts turn immediately to packaging functionality (opening, dispensing, etc.). However, we've found that there is a danger in defining functionality too narrowly. The reality is that we come across very few cases of major functional problems with current packaging, such as leakage or breakage, which are creating high levels of dissatisfaction.

Instead, we've found that the

challenge is identifying unmet (and often unarticulated) consumer needs - and using them as an opportunity to provide differentiating benefits. One frequent example is resealability, which provides value by retaining product freshness and preventing spoiled food. On a spontaneous basis, consumers don't often complain about packaging that doesn't provide resealability. However, when we observe them in their

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homes, we see that they often work around the issue, by taking the food out of its original packaging and putting it into alternative home storage containers (such as unbranded jars, sealed bags, plastic containers, etc.).

When Chips Ahoy identified and acted upon this trend (via the Snack n' Seal feature), it was rewarded with double-digit sales gains. Not surprisingly, we've recently seen this trend extend to other companies and categories, such as Target's Archer Farms cereal packaging.

These examples - and their connection to home storage - also link to the larger opportunity in the home environment. Consistently, we've seen that there is a direct and powerful connection between where products are stored and how often they are consumed. In other words, it's critical to avoid getting "lost in the pantry" - and it's very important to have packaging that creates a consistently-visible branded presence in the home.

The most obvious example is fridge packs, which drove enormous increases in beverage sales upon their introduction. More recently, Heinz drove a 68 percent increase in consumption of its large 64-ounce product through a more slender package that provided improved storage flexibility within refrigerators.

Clear implications

The insights gathered from our study of packaging success stories have clear implications, in terms of guiding both design efforts and investment in packaging innovation.

From a design perspective, the findings point to a very challenging balancing act that must be navigated. To make a difference and drive elusive wins at the shelf, designers need to make significant changes that create visual contrast at the shelf, lead shoppers to take a second look and reconsider a brand.

Smaller changes, which are less striking and not evident from three feet away within a cluttered

shelf, are very unlikely to influence purchase patterns. However, to prevent major mistakes, designers also need to avoid creating brand hesitation and confusion at the shelf. They need to provide some visual continuity, in order to reassure shoppers and bring them along, which acts as a counterbalance against the imperative for dramatic change.

How can designers and marketers navigate this challenge? Fortunately, recent experience points toward at least one successful strategy, as embodied by successful design changes by Baked! Lay's and Kraft salad dressing. In each of these cases, dramatic and visceral design changes - in color, visuals and/or packaging structure - were balanced with continuity in brand identity (to provide reassurance) and very clear product versioning (to facilitate shopability).

On a larger level, our experience highlights the importance of investing in new packaging

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structures and delivery systems, which hold far more potential (than graphics alone) to positively impact both moments of truth. While dramatic graphics changes can certainly make a difference at the shelf, there's no question that structural innovation is a more powerful weapon, in terms of driving wins in the store and at home.

Change their focus

Finally, our experience has powerful implications in terms of packaging research. Overall, it suggests that if researchers are to truly help marketers and designers win through packaging, they need to change their focus in several ways.

First, researchers need to spend more time in the store environment. In addition to discussing packaging with shoppers, researchers need to observe them in the aisles. Packaging research has to incorporate and integrate shopper research, to provide an understanding of decision-making at the shelf – and to identify opportunities to break through clutter via innovation.

In addition, in-store research is needed to systematically uncover retail realities that are limiting sales, by compromising how packaging

appears on the shelf. These insights should guide design briefs and investment decisions regarding new packaging structures.

Second, there's a greater need for in-home insights. Specifically, more research needs to be done to document the full life cycle of packaging in the home, from purchase and transport through storage, use and disposal. By understanding how packaging fits within consumers' lives, we can uncover opportunities to increase consumption rates through new usage occasions. Importantly, we can also help to ensure that packaging doesn't get lost in the home.

This research also highlights the importance of testing new packaging systems within a realistic shelf context, in order to gather accurate measurements of both shelf visibility and shopability.

In addition, it illustrates the need to test new innovations (new packaging structures and delivery systems) holistically, starting at the shelf, moving to the shoppers' hands and eventually to the home environment. This level of rigor, measuring impact on shelf presence and in-home consumption, is needed to fully gauge the ROI

from new systems and, ultimately, to give marketers the confidence to invest in innovation.

Quantifying opportunities

Researchers who embrace these changes – and move beyond a risk-prevention mentality toward a focus on identifying and quantifying opportunities – will become invaluable partners in helping marketers leverage the power of design and win at these two moments of truth. | Q



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A research plan you can take to the bank

Detecting and eliminating racial profiling and unfair sales practices in consumer lending

Market research can be a powerful tool for detecting and resolving problems consumers encounter when applying for credit. These problems and vulnerabilities can manifest themselves in racial profiling and disparate treatment during the loan process. For the consumer seeking credit, he or she may not be able to obtain accurate information to make appropriate credit decisions, and racial profiling and discrimination only magnify the problem and affect the very consumers who need the information the most. For the lender, it can result in business practices that violate the law, reduce revenue and increase risk.

Self-testing through the use of established research methods (such as mystery shopping and matched-pair testing, monadic testing and post-application consumer telephone surveys) can help a financial institution ensure consumer credit decisions are sound and based on receiving understandable and accurate information. These research programs can also help financial institutions adhere to the law and defend against allegations of unfair sales practices and discrimination.

Matched-pair testing and mystery shopping call for testers or mystery shoppers to pose as potential or actual buyers. Unlike statistical procedures which require outcomes (i.e., loan approval, loan denial, pricing) and rely on abstract arguments and statistical principals, mystery shopping provides a record of the treatment or experience. In tests for discrimination, a direct

comparison is made of the experiences of minority and non-minority classes of testers.

Post-application consumer telephone surveys measure the assistance and treatment encountered by loan applicants and whether they maximize the opportunity for loan approval – based on the financial circumstances of the borrower. Similar to mystery shopping, direct comparisons of the attitudes, perceptions and experiences recalled by recently-approved and -denied minority and non-minority loan applicants are made (some surveys include withdrawn and approved-not-accepted applicants).

Both approaches measure disparate treatment. In consumer credit, this may manifest itself in discouraging and/or providing different information to a potential black applicant than

snapshot

Unfair treatment and inappropriate sales in financial institutions often negatively impact minorities and those less knowledgeable about financial products. Market research can help banks guarantee fair treatment of minority and non-minority consumers applying for credit and also help ensure sound sales and service practices to improve the consumers' ability to make appropriate decisions.



By Paul C. Lubin

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Overt or subtle

Differential or disparate treatment may be classified as overt or subtle. Overt differences are those actions which are evident to the prospective borrower. Examples include a prospective borrower told to go to another lender, or told that he or she will not qualify for the loan. Subtle differences are those actions which are not noticeable to the borrower but affect the prospective borrower's access to credit and ability to make an appropriate decision about credit. Examples include telling the black potential borrower that approval time will take 60 days while the white potential borrower is told 30 days; taking longer to approve the black loan applicant than the potential white applicant; or offering the potential Hispanic borrower only loans with lower monthly payments but higher variable interest while offering the potential white borrower a variety of loans, including fixed-rate and adjustable loans.

There are specific steps to take when implementing a market research program designed to help a financial institution adhere to the law and provide fair and equal treatment of consumers during the credit process.

1. A well-defined objective of the market research should be

created along with an action standard concerning how the information will be used. An example of a well-defined objective is: "The objective of the program is to determine the existence of disparate treatment of prospective loan applicants on the basis of race or ethnic origin. The program will examine the following areas and non-minority and minority comparisons will be made: access to information; questioning; products offered and recommended; product features and terms discussed; closing costs and rates quoted; courtesy; and invitation to apply. Disparate treatment will be judged based on the existence of statistical differences at the 95 percent confidence level between minority and non-minority testers or mystery shoppers."

2. An appropriate data collection method should be chosen. The number of mystery shops and/or surveys needs to satisfy the objective and provide information to take appropriate action. Many times the number of interviews conducted is based on cost. Statistical reliability and setting action standards to make decisions can take a backseat to cost and immediacy. This can seriously detract from the credibility of the research. Verifying that the number of mystery shops and interviews will meet the action standards and determining how the data will be used is vitally important.

3. The data collection instrument or questionnaire must be designed properly. The questionnaire should be easy to understand and administer

and be free from bias. The mystery shop questionnaire should be in a checklist (yes/no) format with subjective questions at the end, such as overall shopper satisfaction. This helps reduce the bias associated with what the mystery shopper feels is important by keeping him or her focused on what happened during the mystery shop. Ordering the questions to follow the sales and service process can help the shopper remember the experience and accurately record the details.

The consumer survey, on the other hand, may contain a series of yes/no and rating questions, as well as questions which allow the consumer to express his or her thoughts verbatim. Here the order of the questions is particularly important in order to avoid bias. Asking a customer how satisfied he or she is with the institution at the end of survey may result in a completely different response than asking overall satisfaction at the beginning. Asking customer satisfaction at the beginning of the questionnaire limits bias as the customer will think only of the topics important to him or her when answering the question.

4. Select the right analytical and reporting approach. The analytic approach must meet the objectives of the research. It must describe the results by key decision criteria and point out patterns in the data important to the decision makers. A research program designed to verify compliance with fair-lending laws and ensure fair sales practices should report and quantify the treatment of non-protected and protected classes of potential and/or actual loan applicants (for example, black versus white). Following comparison, make conclusions concerning whether protected and non-protected classes receive similar access to information and whether the information received is similar and appropriate.

5. The financial institution must create an action plan based on the results and assemble a team to develop and implement it. Regulators have provided financial institutions with a self-testing

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tion to make the correction itself. Research becomes even more crucial when the consequences involve entanglement with the law. | Q

Research for public policy

Enter article ID 20080707 at www.quirks.com/articles to read more of Paul Lubin's insights on using research for public policy decisions in consumer lending.

How to make sure 'new' is not 'too new'

FAQs for first-time clients of online qualitative

Online methods have become pretty standard today in survey and quantitative market research. In qualitative research, too, more studies are being done totally or partially online, yet many clients remain hesitant to try this approach. (And, for that matter, so do a number of qualitative researchers/moderators.)

As someone who believes that the research methodology should fit the purpose, I use a variety of interview methods - face-to-face, phone and online - depending on the study situation and goal. In the online area, I'm a "regular user," as we market researchers would say, of bulletin boards; some other online methods I either don't care for (a "rejector") or don't have experience with yet ("non-user"). The bulletin boards offer a rich way of interacting with and getting to know participants, sometimes making it possible to do research that we couldn't have done in other ways. No, I don't think online is superior overall to other forms of qualitative, despite claims some make, but I do think it's worthwhile using when appropriate.

Proposing online methods to non-user clients is sometimes the classic double bind for researchers: clients are impressed by and may even ask for "new" methods, yet they reject online qualitative because it's "too new" for them.

Here are some top FAQs for clients hesitant to use online qualitative and my answers (see the online version of this article for two additional FAQs).

What is online qualitative anyway?

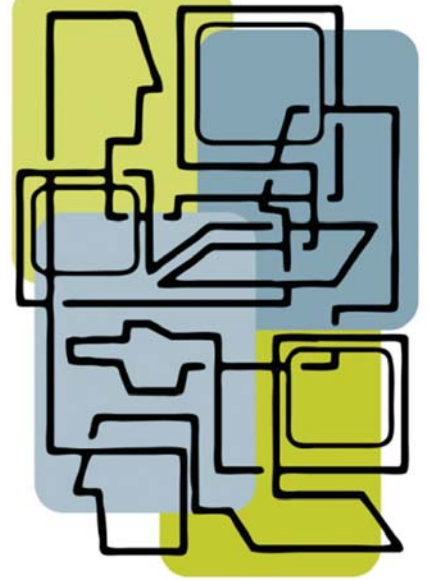
The "online" part refers to the participant interviews/engagement, which typically use Internet access through specially-designed software.

Recruiting may be at least partially online too, but regular telephone screening is often used as well. A number of companies now offer software platforms that enable moderators and participants to enter a virtual room, accessed through the Internet, where they can engage and clients can observe. This "facility" is both wide open because people can participate from anywhere and restricted because access is password-protected for each study.

Some basics about on how online qualitative works, whatever the particular method:

snapshot

Thinking about commissioning some online qualitative? Moderator Judy Langer answers some common questions, exploring how and when various approaches can be used, the client's role in the process and offering tips on selecting a moderator.



By Judy Langer

Editor's note: Judy Langer is president of New York-based Langer Qualitative. She can be reached at judy@langerqual.com. To view this article online, enter article ID 20100107 at quirks.com/articles.

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Anywhere. Physical boundaries disappear with the Internet, opening up the research to anyone with Internet access. Rather than spending time with a few consumers in one suburb, for example, we can interact with people all around the country (or even in different countries). Online qualitative can be a good alternative when potential respondents are far-flung or in remote areas, making in-person interviews impractical or impossible. In one study, we talked about air quality with a mix of urban, suburban and rural residents.

Forms of interaction. Among the different types are the question-and-answer format we're familiar with from other market research; closed-ended questions; participant-created visuals, such as their photographs, videos, collages; self-directed exercises (written or video diaries, blogs); Webcam video of participants and their environment (what some call "ethnography lite"). These activities can be done in face-to-face research too but not as easily or on spur of the moment.

Group or private discussion. Researchers can choose how much of the online discussion participants can see. A question or comment relevant to a subgroup, for example, can be directed just to them. The moderator can send a note publicly to all participants, send it only to certain individuals, or can write privately one-on-one. A particularly valuable feature is the "masked" question: participants see one another's responses (e.g., to a new product concept) only after submitting their comments, eliminating any issue of group influ-

ence. In one study I conducted, all responses were private - participants thought they were the only person being interviewed, but observers and I could view all responses together on the chat stream.

Showing materials. Still and animated materials (concept statements, ads, commercials, etc.) can be shown on a whiteboard. In some platforms, participants can use mark-up tools so they can circle and X-out different parts of concept. Participants can be given links to the client's or other Web sites. And, of course, participants' own visuals can be displayed.

Planned yet flexible. The topic guide is pre-loaded into the virtual room so that questions and instructions will be posted at specified times or, in live discussions, if/when the moderator chooses. In the case of live sessions, various probes come with some software ("Why do you say that?," "Please tell me more.") or can be written in advance by the moderator, then used when desired. These pre-planned time-savers do not confine the researcher, however. We can easily shift the direction of the discussion based on issues that arise.

Client role. Clients can observe the entire process as it develops. They have their own viewing room where they can talk with the moderator and one another. Communications with participants have to go through the moderator - that is, unless the decision is made to involve clients in the conversation. At the end of one magazine study, several editors came into the participant room; the back-and-forth dialogue greatly enriched the research.

Of course, online qualitative eliminates travel expenses, time and hassles, an advantage it shares with telephone qualitative. But other expected advantages are not always realized. Clients are sometimes surprised to find that online qualitative compared to other forms of qualitative is not necessarily:

Faster. Recruiting time is about what it is for in-person and phone qualitative study. Fieldwork time, of course, depends on the length of the engagement, which may or may not be different from other qual studies. One part that is definitely faster: raw transcripts are instantly available since participants type and post their pictures. (And, yes, there has been a decline in the public's spelling, grammar and punctuation.)

Cheaper. Online surveys are significantly less expensive than door-to-door (remember those?) and phone studies, but online qualitative is, at best, slightly lower. Recruiting costs and incentives are often about the same; while people aren't asked to travel to a research facility, studies can take a substantial amount of time. Moderator fees may be higher because some online studies are so labor-intensive, even without travel. (More about that later.)

Easier. Sure, it's easier for clients and researchers to sit at their computers than to traipse through airports, but designing, conducting and, most of all, analyzing online qualitative projects can be more work.

What online qualitative method alternatives are there?

A wide range of online qualitative

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methods (products) already exists, and undoubtedly the number will continue to grow.

Real-time. Participants interact with the interviewer and one another live. Online focus groups or chats typically have six to eight respondents and last 60–90 minutes – that is, have about the same number of participants as in-person focus groups with somewhat shorter duration.

Mini-groups using Webcams can bring together people around the country; there tends to be a short time lag between the audio and video, which can be distracting at first. One-on-one interviews done by phone with a Webcam enable the interviewer and respondent to see and hear each other, while visuals (e.g., ads) and text can be shown.

Asynchronous. A somewhat fancy way to say that people are in the virtual room at different times, usually when it is convenient for them in their time zone. Bulletin boards, which I personally like, are a popular example.

Words and pictures. Methods used

to be divided between (primarily) text-based tools and image/video-based platforms, but increasingly these are coming together. Today's software systems now support a wide variety of formats and ways of interacting. Bulletin boards, originally mainly question-and-answer, for example, now include more of the participant-created photographs and videos mentioned before.

Blogging. Participant journals can be used as a separate tool or integrated into other formats. These secure blogs, available only to study participants and observers, are an easy way for participants to record their thoughts and experiences.

Mobile. Text messaging enables participants and researchers to interact from anywhere. Rather than trying to recollect their feelings and actions later, they can keep notes or answer questions at the time. From what I've seen and heard, this approach seems to work better as a supplement to other online qualitative rather than as a standalone method.

Hybrid quant/qual studies. One

approach is described as “incorporating moderated interview sessions into an online survey,” where respondents' answers to closed-ended questions are probed. Another method uses live focus groups with anywhere from 25 to 200 people. Participants answer both open- and closed-ended questions; answer tallies and randomly selected verbatims are displayed in real time. (I worry about showing numbers on such small samples, particularly in percentages, and find the verbatims skimpy.)

Communities. These ongoing groups are typically large, with hundreds of people. Some communities consist of brand fans/customers for what one research company calls “insight and co-creation.” Research is often only one part of the community's purpose. Here too the method is positioned as “transcend[ing] the qual/quant divide.”

What are bulletin boards and their advantages?

Bulletin boards, in one form or another, are the most popular online



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qualitative method. Asynchronous, the boards take place over an extended period of time. Participants may be asked to answer questions, read and discuss one another's comments in a threaded discussion, perform different exercises and homework assignments, create and upload photos, and so on.

Most commonly, a study has between one and three bulletin boards (more is definite overload), with 18-20 active participants each, logging on once or twice a day over a period of three to six days. That size group, though too large in person, provides substantial interaction online without overwhelming participants.

The days or day parts are usually divided into different topics. Here's an example of a four-day study: day one, general context; day two, specific products/brands; day three, reports (including photographs/videos) of store visits; day four, reactions to new product concepts. Or, there might be a week's break after day three, then another day or two with the same participants on new product concepts developed in phase one.

The beauty part is that bulletin boards are so flexible. The answer to "How many people for how many days?" is, "Do what works for your study." The size of a board can range from a small group (six to eight) to a large group (I've heard up to 80 mentioned). Longer studies can go for a year or more, for example, following the decision-making process; in these cases, posting is less frequent. Participants can be added during the board, can be selected for follow-up work, or (this moderator's dream) discreetly dropped through the magic trap door without disrupting the

group. We can subdivide a group for separate conversations or bring bulletin boards together. In one study of a Western state, for instance, one board was with long-term residents, the other with newer residents. After a few days, we created one board, encouraging dialogue between these presumably hostile segments.

Bulletin boards have several advantages as a qualitative tool, in addition to geographic spread.

Participation engagement. Bulletin boards offer the convenience of participation from home or office without being locked into a discussion at one particular time. (While we ask for daily participation in a shorter board, participants can catch up if they miss a day or two.) As a result, it's often easier to recruit busy people, including higher-level executives, than for in-person interviews. Interacting with and learning from others also attracts some to the group discussions.

Rich responses. With more time to think, write, read, explore, post pictures and so on, participants often give us much more input. I much prefer bulletin boards to the live online chats, where everyone has to rush to type, and moderators researchers rush to read, retain and redirect. Compared to in-person qual, the bulletin board researcher doesn't have to cut off articulate respondents who take airtime in a group, throw off the moderator guide schedule or simply annoy observers; on a board, participants can "talk" at the same time without depriving anyone else of their opportunity. ("Here are 10 reasons to buy organic" was the beginning of a 469-word post in one study.)

Obviously, some people "talk" more than others, but the overall level of engagement tends to be quite high.

Little group influence. Because they do not interact face-to-face, participants tend to be candid, not worrying about offending others or being swayed by dominant respondents. With the masking feature, respondents react to materials initially on an individual basis, before seeing others' comments. Screen names can disguise participants' identity, freeing them to answer anonymously; employees who would normally be concerned about speaking up, for example, can give honest feedback. Another advantage is that a broader range of people can feel comfortable together in a board than they might in person. For example, in face-to-face focus groups on skincare, we usually wouldn't mix women 21-50 years old since age can be a touchy issue. Online, because they don't see one another, this works well.

Creative/interesting activities. Assignments during the boards can enrich the conversation. A few examples:

- Go to at least one store, look at products in the category (not just your regular brand).
- Talk to your friends to find out what they think of the issue.
- Visit a makeover Web site, upload your photo and try out different cosmetics.
- Send in a photo of yourself with a favorite treat and tell us why it's special.

When are bulletin boards a good choice?

Bulletin boards can work well for many different kinds of stud-

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ies - attitudes and usage, deep-dive exploratory, new concepts, advertising and so on. The choice of online qual and other qual doesn't have to be either/or, however. Often they make a great combination in hybrid projects with other qual methods:

Before. Prior to in-person focus groups on happiness - a broad, perhaps intimidating subject - respondents were invited to a bulletin board with questions on when they experienced moments of being happy and unhappy. Their private answers served as warm-up for the sessions. In another study, prospects for an automotive brand participated in a journal-type board (no interaction); the most interesting people were selected for follow-up home visits and drive-alongs.

Simultaneous. Usually these are done together in the interest of time, rather than sequentially.

After. In-person interviews in one market with the client observing (often in their home town) help the team refine the topic guide and concept materials. The subsequent interactions with participants around the country provide a wider view. Online can continue the dialogue with participants, for instance, in probing their reflections on the in-person experience or having them try a product at home.

In the study in which we asked women to visit a makeover Web site, the in-person depth interviews and focus group enabled us to see what the women did on the sites, their body language in response to the sites and their appearance/style (relevant to cosmetics). In the focus group, we also observed how strangers bonded using the software. In the bulletin board, women around the country could upload their own photograph and play with a Web site as long as they wanted rather than being rushed; most sent us their photographs. Reactions across methods were quite consistent, giving us confidence that the face-to-face interviews in one market were not anomalous.

Needless to say, online doesn't work for all kinds of studies. In-person is still better for tasting and touching products (vs. using

the products on their own), for showing or sorting a large number of objects and for seeing how customers look and behave.

What should I look for in a moderator?

Should your bulletin board moderator be an online specialist or a qualitative researcher with some online skills? They don't have to be a techie, although that can help. Several online qualitative software companies offer

very good training for newbie online moderators and updates on their constantly-evolving technology. Some of these companies also provide excellent support during the studies, patiently explaining how-tos on posting the topic guide, sending probes and so on. Needless to say, it takes a while for most moderators to feel comfortable using the software.

Bulletin boards are different from other qual from a research standpoint as well. Topic guides need to be



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more fleshed out yet avoid being long-winded. Moderator posts have to be very clear on what we're looking for since we're not with the participant to explain, reword or probe. Participants may give simple yes/no answers if we don't repeatedly emphasize we're interested in why they feel a certain way. What would be a follow-up probe in live qual becomes part of the question online.

With all the differences, it is important to keep in mind that bulletin board moderators should fundamentally be good researchers who can design and analyze studies.

What are the problems/issues of bulletin boards?

Boards present a number of challenges for moderators and clients.

Maintaining interest. I've never had a participant walk out in the middle of an in-person interview, but overburdened or bored board members do complain or drop out. Graphics, stimulating questions, feedback, reminders and upping the incentives are among the ways to keep participants actively involved. In a business-to-business three-day board, we showed 17 concepts and asked the same questions for each. Explaining that we needed consistency and interspersing some refresher questions kept them with us.

Partial participation. Not everyone on a board answers every question, even with e-mail and phone reminders. In face-to-face focus groups this also happens but directly addressing an individual usually gets a response. Some board software can be programmed to require answering a question before proceeding. A related challenge is engaging "quieter" participants. An issue in any qual interview, these people can be more difficult to engage and draw out online.

Problems probing. Follow-ups by e-mail are generally less effective than in in-person or phone interviews. Because the probes are not immediate, they're easier to ignore, even with reminders. Software improvements help in showing participants the questions and messages to which they have not yet responded.

Engagement overload. We need to remember that participants have a life outside the boards. We should stick to the time demands promised, rather than burdening participants with too many assignments and questions. Homework overwork is an issue, especially if the moderator underestimates (or fudges) the time commitment during recruiting. This doesn't mean that we can't be flexible; if ideas for new tasks arise, raise the incentives in recognition of the extra work.

Getting to know you. Following individuals is more difficult, although personalities do emerge and interesting/colorful people stand out. Strategies for dealing with this include sorting the transcript by segment (user/non-user), keeping notes during the board and running the transcript through Excel to see a person's posts straight through.

What does it all mean? It's great that boards are so rich – and in many ways this is the biggest challenge for every moderator I've talked with. A three-day board on home decorating resulted in a transcript of nearly 400 pages, plus four-to-six photos of each participant's home. That's an awful lot for researchers and clients to wade through. The software platforms have tagging features that enable researchers to classify verbatims, highlighting good ones, along with comments/analysis; some researchers also use special qualitative analysis software. A number of researchers use these but I prefer my own informal note-taking.

What role do clients play in bulletin board studies?

Clients are involved in the usual role of briefing the researcher, having input into and approving the screener, the topic guide and report. Observation of the boards, however, tends to be very different, and not necessarily in a good way. Real-time interviews, whether in-person or online, are "appointments" clients usually make time for on their calendars. With bulletin boards, though, client involvement seems to range from super-intense to non-existent. On one end of the spectrum, clients log on mul-

iple times a day, sending multiple comments to the moderator on new probes, changes in the guide, respondents to get rid of, etc. Comments can come from a team of clients, who don't necessarily agree with one another.

More common seems to be the other extreme, the absent client. In a client team of 10, for example, just one or two may log on just once over the three days, sometimes only at the beginning of the board before discussion has gotten underway. (The moderator view of a board shows us exactly when and how often observers log on.) From the client's point of view, the fact that boards are less demanding of their time than in-person groups can be a plus. Moderators I've spoken with, however, want some direction during the study rather than trying to fix problems afterwards. Techniques that researchers use for engaging clients include sending daily updates, transcripts with starred quotes, intriguing quotes, ideas for new approaches and (trying to) schedule debriefs.

So, how to get started?

For first-time clients, a toe-in-the-water approach may be best: use one or two bulletin boards as a complement to the qual method you're comfortable with, and use your regular researcher, if possible. Let the bulletin board method free you. Imagine a focus group with people from just about anywhere; that's almost as long as you want; where you can ask follow-ups days later, even after the research is officially over (you have to ask permission during the board); where participants can go beyond the virtual room – to the store, to talk with their friends and family, to check out Web sites, to try a product in their own home; where articulate people don't have to be cut off in the interest of time; where you get to see people's real-life world; see their thoughts and feelings represented visually. Remember that you're not locked into an online interaction – you can arrange for a phone, Webcam or face-to-face interview too. Exciting, isn't it? | Q



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Survey Monitor

continued from p. 8

with the pretense of saving at supermarkets by using shopping lists and coupons, the actual amount they are spending on groceries and the items they purchase aren't all that different than what they tossed into their baskets before the slump started. As a result, while marketers are predicting that these sweeping changes will stick, in terms of food, consumers will come out of this recession with little in the way of changed habits, claims Barry. For more information visit www.hartman-group.com.

Consumer confidence on its way up globally

With many economists reporting that the worst of the global economic crisis appears to be over, consumers around the world are expressing more confidence about their personal financial situations, according to the Nielsen Global Consumer Confidence Index, conducted by New York researcher The Nielsen Company, which rose from 77 index points in April 2009 to

86 in October 2009. Brazil, Hong Kong and South Korea recorded double-digit boosts in confidence, while the U.S. recorded its first increase in consumer confidence since early 2007. But although most consumers are feeling better about the economy, they remain cautious about spending.

Consumer confidence rose in 45 out of the 52 countries (Ukraine and Saudi Arabia were added in the latest round of the survey). Consumers in India, Indonesia and Norway topped the confidence index, while the most pessimistic consumers were in Latvia and Japan. Hong Kong posted the largest consumer confidence increase in the third quarter compared to the second, up 14 points from 79 to 93 points, followed by South Korea (+13 points) and Brazil (+12 points). Confidence rose 8 points in India, 6 points in China and 4 points in Russia compared to the previous quarter. Consumer confidence fell in only two countries: Spain (-4) and Japan (-2). Australia and New Zealand also posted double-digit increases during the last quarter, while Europe's two largest economies, France and Germany, posted

the highest increases in the Eurozone, up 7 and 5 points, respectively. For more information visit www.nielsen.com.

Viewing of movies and TV shows online doubles in '09

The number of U.S. broadband households watching premium online content, including movies and TV shows via the Internet, doubled in the last year, according to Broadband, Communications and Entertainment Bundles, a study from Parks Associates, a Dallas research company. Over 25 million U.S. broadband households regularly watch full-length TV shows online, while over 20 million watch movies online.

The growing popularity of online portals such as Hulu.com shows rapid growth in the number of viewers who use the Internet to watch long-tail and premium content. This shift highlights the opportunity for service providers to extend their current pay-TV and video-on-demand services to include online and mobile video features. For more information visit www.parksassociates.com.

Americans dining out less but not cooking more? Recession heats up microwave cooking

The economic downturn can be blamed for a number of lifestyle changes, but causing Americans to cook more is not one of them. Despite the decline in dining out and the fact that more Americans are eating at home, more are turning to their microwaves to serve their food up for them. Americans used their microwave ovens more in 2009 and their stove tops less, according to Port Washington, N.Y., research company The NPD Group.

Approximately 20 percent of all meals prepared in U.S. homes from 1990 to 2007 involved the use of a microwave, until last year when usage rose 10 percent. Stove tops remain the most popular cooking appliance, but the percent of main meals prepared on a stove top dropped from 52 percent in 1985 to 33 percent in 2009.

"Microwaving has been flat for two decades, but it increased last year as Americans found a way to eat at home and not cook," says Harry Balzer, chief industry analyst at The NPD Group. "We're using our microwaves to warm and heat more, but not prepare more dishes from scratch." For more information visit www.npd.com.



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Product and Service Update

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the application through a new custom development framework. For more information visit www.visioncritical.com.

FreshMinds tool to measure online brand buzz

FreshMinds Research, London, has launched a suite of social media monitoring services to allow clients to examine how and why online consumer conversations are shaping their brand, both on- and offline. The buzz-tracking capabilities have been designed to feed into brands' ongoing social media strategies; track the quantity, content and sentiment of chat around their brand; and map the success of online marketing initiatives. The solution operates by mining blogs, forums, news sites, social networks and micro-blogging sites and includes a social media audit and a social media monitor tool.

Buzz monitoring can be integrated with primary and secondary research projects. Results will be benchmarked to reveal the strengths and weaknesses of a brand's social media strategy against that of its peers. For more information visit www.freshminds.co.uk.

Mobile Marketing Association launches panel

The Mobile Marketing Association (MMA), New York, has partnered with Kinesis Survey Technology, an Austin, Texas, research company, to launch the MMA Global Research Panel, a service designed to collect via the mobile channel data regarding mobile campaigns, objectives and outcomes. The MMA Global Research Panel is intended to facilitate an ongoing dialogue and produce regular reports available to MMA members and participating brands and agencies. Reports include information based on questions asked of mobile marketers about their perceptions of the mobile channel, such as which mobile platforms they are using, how much they are spending and what results they are seeing. For more information visit www.mmaglobal.com.

Briefly

Starting this month, Out Now, an

Australian marketing company, has partnered with GNETWORK360 in Buenos Aires, Argentina, to research gay and lesbian consumers in Argentina. Research will be conducted online and a sample drawn from gay, lesbian, bisexual and transgender people across Argentina. Questions will cover a diverse range of consumer, lifestyle, social, workplace and political issues. Out Now will also open an office in Buenos Aires to support work on the survey. For more information visit www.outnowconsulting.com.

London research company YouGov has launched a 24-hour omnibus service. YouGov's fast-track service is designed to interview 1,000 British adults on a daily basis and deliver results within 24 hours. For more information visit www.yougov.com.

BuzzLogic, a San Francisco research software company, has released BuzzLogic for Media Partners, a platform intended to allow media companies to capture additional revenue from advertisers looking to reach audiences engaged in specific conversations and understand audience involvement in online conversations. The platform is designed to identify like-minded authors across networks, categories and channels, showing how they connect around common themes, and to identify partner inventory based on criteria such as reach, audience demographics, conversation density (or author expertise) and social activity around content. For more information visit www.buzzlogic.com/mediapartners.

Accelerant Research, Charlotte, N.C., has introduced BlogNog, an online qualitative research platform that uses the blogging culture to have online conversations with respondents, either in a one-on-one conversation stream or a one-to-many bulletin-board format. The format aims to simulate traditional qualitative methods and provide improved geographic reach, fast feedback and results, and no travel costs and scheduling challenges. For more information visit www.blognogresearch.com.

Reston, Va., research software

company Clarabridge has released Clarabridge Enterprise 4, which includes an ad hoc uploader; upgrades to the natural language processing and sentiment engines; new collaboration tools in the classification suite; and built-in early warnings and alerts. For more information visit www.clarabridge.com.

SurveyHealthCare, a New York research company, has developed a pharmacist database that includes pharmacists who have indicated they work in various settings, such as independently-owned pharmacies, hospitals, chain stores, managed care, mass-merchant stores, grocery stores or mail order. For more information visit www.surveyhealthcare.com.

Ipsos Marketing, a New York research company, has released Novaction NextGen Forecasting System, a modular forecasting tool designed to measure the potential of new consumer package-goods products throughout the innovation process. Novaction NextGen is based on Ipsos' Designor STM forecasting model. Novaction NextGen forecasts are intended to be added to existing innovation, including idea testing, concept screening, concept and product testing, communication testing, package testing and line and price optimization. For more information visit www.ipsosmarketing.com.

Roller Marketing Research, Gloucester, Va., has launched Research Design Review, a blog devoted to discussing qualitative and quantitative research design issues. The blog is located at www.researchdesignreview.com

QualVu Inc., a Golden, Colo., research company, has updated VuPoint, its analytics portal designed to manage and organize video-based qualitative output generated on- or offline. VuPoint aims to allow users to watch participant video as it is submitted; collaborate among stakeholders; create video highlight reels; and generate online reports. VuPoint also processes video data output such as DVD recordings from traditional focus groups. For more information visit www.qualvu.com.



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Research Industry News

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brand will continue to exist as Angus Reid Public Opinion, specializing in analyzing and understanding citizen markets and the public commons. All other research practices and divisions will adopt the Vision Critical name. The combined company will continue to be led by Angus Reid. Board membership and shared ownership will not change, as both companies have shared a joint-ownership structure since 2006.

Dallas research company **e-Rewards Inc.** has agreed to acquire **Research Now**, London, wherein Research Now will become a wholly-owned subsidiary of e-Rewards upon completion of the transaction. Hal Brierley, chairman and CEO of e-Rewards, will continue to serve as chairman of the board. Chris Havemann, chief executive of Research Now, will serve as CEO.

Alliances/strategic partnerships

Research Panel, Japan, has partnered with Korean research company **Trend Monitor** to include Japan in a multi-Asian country consumer research and data reporting service, which was originally conducted in China, Korea and Taiwan.

Biz360 Inc., a Redwood City, Calif., research company, has entered into a strategic partnership with San Francisco consultancy **Chess Media Group** to measure and explore the impact of social media. Biz360 has named Chess Media Group's co-founder Jacob Morgan advisor to the company.

Dulles, Va., research company **Vovici** and **Attensity Group**, a Palo Alto, Calif., research company, have partnered to deliver a software-as-a-service-based loyalty solution that incorporates formal and informal customer feedback.

Wikimedia Foundation, a San Francisco nonprofit information company, has partnered with Reston, Va., research company **comScore** to provide Wikimedia access to

comScore's Web measurement tool, Media Metrix, which Wikimedia will use to augment its global site-usage statistics; interpret project participation and editing trends; and develop a strategy to expand awareness and usage in new markets, such as Asia.

Harris Interactive, a Rochester, N.Y., research company, and **Ideas To Go Inc.** (ITG), a Minneapolis innovation consultancy, have entered into an agreement granting Harris Interactive access to ITG's Creative Consumers associates panel to explore, create concepts for and test new products.

Kansas City, Mo., advertising agency **Bernstein Rein** has partnered with **Bill Engel**, an analytics and marketing research expert, to optimize its marketing efforts.

Association/organization news

Larry Brownell, CEO of the **Marketing Research Association**, Glastonbury, Conn., will step down from his post on January 31, 2010, after over six years of service. Colleen Moore-Mezler and Steve Schlesinger will head the search committee for Brownell's replacement.

Awards/rankings

Cologne, Germany, research company **Globalpark** has been selected for the third time to the 2009 Deloitte Technology Fast 50, which ranks the fastest-growing technology companies in Germany. Companies are chosen based on the percentage of revenue growth over five years. Globalpark was ranked No. 25 for achieving 422 percent growth from 2004 to 2008.

Dallas research company **e-Rewards Inc.** has been ranked No. 11 in the Dallas 100 Awards, presented by the **SMU Cox Caruth Institute for Entrepreneurship**, Dallas. The awards honor the 100 fastest-growing privately-held companies in the Dallas area. 2009 was e-Rewards' fifth year on the list.

The Marketing Research Association (MRA), Glastonbury, Conn., honored its 2009 volunteer award winners at MRA's First Outlook

Conference, November 4-6, 2009, in San Diego. **Meg Ryan**, Online Survey Solution, received the Rising Star award; **Ken Roberts**, Cooper Roberts Research Inc., Shining Star award; and **Lynn Stalone**, I/H/R Research Group, Shining Star award. The **Northwest Chapter of the MRA** was the recipient of the Best Chapter Education Event award. **Nichols Research** received the Celebrated Company award.

Timothy Keiningham, global chief strategy officer and executive vice president of Parsippany, N.J., research company **Ipsos Loyalty**, was part of the team that received the Best Practitioner Presentation Award at the 2009 Frontiers in Service Conference.

New accounts/projects

EU Health, a Lancashire, U.K., online health care database, has partnered with Stockholm, Sweden, research company **Cint** to include data from EU Health in the Cint Panel Exchange.

GH Korea, a Seoul, South Korea, research company, has joined Rochester, N.Y., research company **Harris Interactive**'s Global Partner Network of independent market research companies.

Gillian Kenny Associates Limited, a Gloucester, U.K., research company, has selected Montreal research software company **Voxco**'s Command Center SaaS platform for conducting phone and online surveys and online reporting.

Additionally, Harris Interactive has adopted Westport, Conn., research company RelevantView's digital fingerprinting technology RelevantID to ensure Harris' online research is free of duplicate or fraudulent respondents.

The National Statistics Institute, Madrid, Spain, has selected Fort Washington, Pa., research company **Marketing Systems Group**'s PRO-T-S research Predictive dialing software for Spain's Agricultural Census 2009.

EasyInsites, a Surrey, U.K., research company, has been appointed

by **Review Centre**, a Surrey, U.K., consumer review site, to build and manage its consumer research panel. The proposed panel will include Review Centre's 30,000 most-active members, covering all age ranges and socioeconomic demographics.

Choice Hotels International Inc., Silver Spring, Md., has selected Reston, Va., research software company **Clarabridge's** text mining solution to increase guest satisfaction rates and efficiency for its franchisees.

New companies/new divisions/relocations/expansions

20/20 Research Inc., Nashville, Tenn., has expanded its project management and technology support to European clients during European business hours. The European desk opens at 2:00 a.m. CST and will offer support via phone and via online text chat for the QualBoard platform.

EC Navi, a Tokyo Internet service company, has launched **Research Panel Asia Inc.** (RPA), a subsidiary

for building online survey panel business in Asia. RPA launched its first overseas panel (91wenwen.com) in China. RPA will be headquartered in Tokyo and led by Shogo Nakazato. The company is online at www.researchpanelasia.com.

MDC Partners Inc., a Toronto research company, has formed a Consumer Insights Group. Chris McDonald will lead the group.

InsightExpress, a Stamford, Conn., research company, has moved its headquarters to 333 Ludlow St., Stamford, Conn.

Merkle, a Columbia, Md., marketing agency, has created a market research practice as part of its Quantitative Solutions Group. Christine Baskin will head the practice in the role of vice president.

Sample U, a San Diego research company, has opened its first ongoing product testing center on the campus of Alliant International University,

San Diego. The center is designed to allow companies to receive consumer feedback on product introductions in a controlled environment prior to market release. Sample U is free and open to the public.

Research company earnings/financial news

United Sample, Encino, Calif., announced a triple-digit increase in sales from April 2009 to October 2009 over the prior-year period.

The board of directors of **Arbitron Inc.**, Columbia, Md., has approved the payment of a quarterly cash dividend of \$0.10 per common share (\$0.40 per share on an annualized basis) to be paid on or about January 4, 2010, to shareholders of record as of the close of business on December 15, 2009.

The GfK Group, Nuremberg, Germany, reported earnings for third-quarter 2009. Adjusted operating income amounted to 38.2 million euros. The company achieved sales of 282.7 million, and the sales decline in

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organic terms was more than halved to 5.1 percent from 11.7 percent in the second quarter of 2009. In the first nine months of 2009, GfK generated sales of 840.2 million, down from 883.8 million during the prior-year period. Overall, sales declined 4.9 percent.

Adjusted operating income rose to 38.2 million in the third quarter, compared with 36.8 million in the second quarter of 2009. In the first nine months of 2009, GfK generated income of 89.8 million, down from 104.3 million in the prior year.

Ipsos, Paris, reported revenue of 669.6 million euros for the first three quarters of 2009, down 3.9 percent from the prior-year period. Ipsos generated revenues of 221.8 million in third-quarter 2009, down 5.3 percent compared with the year-earlier period. Emerging markets delivered organic growth of 2 percent over.

Harris Interactive, Rochester, N.Y., announced financial results for the first quarter of fiscal year

2010. The company generated \$0.8 million in operating income and achieved \$2.1 million in adjusted EBITDA, including the add-back of \$0.1 million in restructuring and other charges.

National Research Corporation, Lincoln, Neb., announced results for the third quarter ended September 30, 2009. Revenue for the quarter was \$13.5 million. Net income was \$2 million. Operating income increased 4 percent to \$3.3 million, compared to \$3.2 million for the same period in 2008.

Revenue for the first nine months of 2009 increased 13 percent to \$43.9 million, compared to \$38.8 million for the same period in 2008. Net income for the first nine months of 2009 increased 13 percent to \$6.3 million over the same period in 2008.

Datascension Inc., Las Vegas, announced financial results for the third quarter ended September 30,

2009. The company recorded a net loss of (\$49,978), compared to a net loss of (\$5,044,809) in third-quarter 2008.

Total net revenue decreased to \$3,550,457, a decline of 10.7 percent from the prior-year period. The company generated a gross profit of \$675,536, an increase of 36.2 percent over the same period in 2008.

Net income for the nine months ended September 30, 2009, was \$160,367, compared with a loss of (\$5,785,590) in the year-earlier period. Revenue totaled \$11,138,267, a decrease of 20.5 percent. Gross profit was \$2,114,096, compared with \$1,655,115 in 2008.

InfoGroup, Omaha, Neb., reported revenue of \$125 million for the third quarter of 2009, down 14 percent over the same period in 2008. Operating income was \$9.4 million, compared to an operating loss of \$12.4 million in the third quarter of 2008. Net income was \$4.8 million, compared to a net loss of \$8.6 million in 2008.

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Names of Note

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London research company *Verve* has appointed **Jeremy Hollow** and **Nina Treney** as client service director.

Chicago research company *Fieldwork inc.* has appointed **Michelle Fagerholt** as president, Fieldwork San Francisco.



Fagerholt

Kadence International, a Framingham, Mass., research company, has appointed **Greg Clayton** as insight director, Singapore. Separately, **Piers Lee** of Kadence International has

been elected president of the *Market Research Society of Singapore*.

Lynette Cooke has assumed the role of sole CEO of *Kantar Health*, a New York division of Fairfield, Conn., research company The Kantar Group, following the departure of joint CEO **Elaine Riddell**.

MarketVision Research, Cincinnati, has appointed **David Moak** vice president, pharmaceutical, biotechnology and medical diagnostics.

Ian Jeffrey has been appointed CEO of *Ipsos Markinor*, a South Africa research company.

Devon Reimer has joined *Integrated Marketing Associates LLC*, a Bryn Mawr, Pa., research company, as vice president.

Montreal research company *iPerceptions Inc.* has named **Stephen Lapointe** CFO.

MarketShare Partners (MSP), a Los Angeles research company, has

appointed **Jim Garrity** to its board of advisors. Additionally, MSP has hired **Peter Cain** as vice president, analytics.

Market Probe Inc., a Milwaukee research company, has added **Tom Doyle**, **Arlene Cohen** and **Dawn Payne** to its pharma division.

Austin, Texas, research company *Bazaarvoice* has appointed **Bernie Feiwus** and **Joe Shults** to its advisory board.

Group Dynamics in Focus Inc., a Bala Cynwyd, Pa., research company, has hired **Terry Salat** as director, business development.

(Editor's note: The following is a correction of a misprint in the December 2009 *Names of Note*.)

London research consultancy *Double Helix* has hired **Sally M. Davis** and **Margie Sherr** as vice president, strategic market research. Both will be based in the company's Fort Washington, Pa., office.



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The Web, cell phones unite the United States

One of the early fears about the Internet was that it would drive us apart, turning us from groups of social creatures into antisocial units of one, isolated and focused more on our cyber lives than the things going on around us. That situation undoubtedly exists but a more prevalent and fascinating twist has been the Web's role in helping us form and maintain vast and vibrant networks of e-based friendships and linkages.

Far from cutting us off from each other, the Internet has made possible links that likely never would have been forged. Think of the thousands of sufferers of rare diseases, who can now share the daily indignities that their conditions inflict on them, along with the tiny victories that keep them from giving up hope. On a more mundane level, consider all the hobbyists, sports fans, political junkies and other similar tribes who need only a few mouse-clicks to bond with like-minded people around the world.

Recently-released data from the Pew Internet and American Life Project confirm that the initial worries about the Web were unfounded.

In examining how people use the Web and mobile phones to interact with family and friends, the Pew research found that, on average, the size of our discussion networks – those we consult about important matters – is 12 percent larger among mobile phone users, 9 percent larger for those who share photos online and 9 percent bigger for those who use instant messaging.

The level of diversity of our core networks – those we view as our closest and most significant confidants – tends to be 25 percent larger for mobile phone users and 15 percent larger for basic Internet users. The diversity is even greater for frequent Internet users, those who instant-message and sharers of digital photos online.

The survey was conducted by researchers from the University of Pennsylvania's Annenberg School for Communication, led by Keith N. Hampton, assistant professor of communication, and the Pew Internet Project. (For more info visit www.pewinternet.org.)

Examine social isolation

On a larger level, the study sought

to examine social isolation in America and found that just 6 percent of the U.S. adult population claims to have no one with whom they can discuss important matters or who they consider to be “especially significant” in their life.

Rather than isolating us, mobile phone ownership and participation in a variety of Internet activities are associated with larger and more diverse core discussion networks. “There is a tendency by critics to blame technology first when social change occurs,” said Hampton in a press statement. “This is the first research that actually explores the connection between technology use and social isolation and we find the opposite. It turns out that those who use the Internet and mobile phones have notable social advantages. People use the technology to stay in touch and share information in ways that keep them socially active and connected to their communities.”

As taken from the Pew press materials, here are some of the other key findings in the Social Isolation and New Technology report:

Despite worries that Internet use limits people's participation in their local communities, the research found that most Internet activities have little or a positive relationship to local activity. For instance, Web users are as likely as anyone else to visit with their neighbors in person. Cell phone users, those who are online frequently at work and bloggers are more likely to belong to a local voluntary association, such as a youth group or a charitable organization. However, there is some evidence that use of social networking services (e.g., Facebook, MySpace, LinkedIn) substitutes for some neighborhood involvement.

While Internet use does foster social contact across vast distances, many Internet technologies are used as much for local contact as they are for distant communication.

Web use does not pull people away from public places. Rather, it's associated with frequent visits to places such as parks, cafés and restaurants - the kinds of locales where research shows that people are likely to encounter a wider array of people and diverse points of view. Indeed, Internet access has become a common component of people's experiences within many public spaces. For instance, of those Americans who have been in a library within the past month, 38 percent logged on to the Internet while they were there; 18 percent have done so in a café or coffee shop.

Our mobile phone use outpaces our use of landline phones as a primary method of staying in touch with our closest family and friends, but face-to-face contact still trumps all other methods. On average in a typical year, people have in-person contact with their core network ties on about 210 days; they have mobile-phone contact on 195 days of the year; landline phone contact on 125 days; text-messaging contact on the mobile phone 125 days; e-mail contact 72 days; instant-messaging contact 55 days; contact via social networking Web sites 39 days; and contact via letters or cards on eight days.

Social media activities are associated with several beneficial social activities, including having discussion networks that are more likely to contain people from different backgrounds. Frequent Internet users, for example, and those who maintain a blog are much more likely to confide in someone who is of another race. Those who share photos online are more likely to report that they discuss important matters with someone who is a member of another political party.

While participation in traditional social settings, like neighborhoods, voluntary organizations and public spaces, remains the strongest predictor for the overall diversity of people's social networks, Internet use, and specifically use of social networking services like Facebook, is also associated with knowing more people from a wider variety of backgrounds.

"All the evidence points in one direction," said Hampton. "People's social worlds are enhanced by new communication technologies. It is a mistake to believe that Internet use and mobile phones plunge people into a spiral of isolation." | Q

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In late 2009, Quirk's enjoyed its strongest month ever, with circulation and Web traffic hitting new heights. Print circulation was the highest it's ever been at 17,044, plus an additional 4,000 overseas readers who received Quirk's digital edition. E-newsletters reached an audience of 18,642, and Web traffic rose to 64,000 unique visits, with close to 300,000 monthly page views. These increases are all thanks to our readers, more and more of whom are choosing Quirk's as their main source for all things research-related!



cover-to-cover

Facts, figures and insights from this month's issue



Forty-one percent of people globally, including one in four Americans, said they were glad the world had an economic crisis, as it has helped them realize their priorities, and 52 percent of Americans have permanently changed their attitudes regarding the importance of saving money. (page 8)



Senior management's time is increasingly precious, so they just want to know the key insights and how the company should act on the insights. If there is little or no marketplace impact as a result of the research investment, why should they keep investing? (page 29)



One researcher told us how powerfully she moved ahead when she began to attend industry conferences. She got to travel with her internal clients (a great chance to build personal relationships) and build credibility for her research recommendations by tying them to industry as well as survey data. (page 38)



Before anyone devotes much creative time to designing a package, care should be taken to understand how consumers shop the category and use packaging in their decision process. Importantly, even though some of the information categories might be similar, one should not rely on advertising message research to drive package design. (page 42)

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Congratulations to November's winner, Lesley Kibler of Office Depot, Boca Raton, Fla. November's prize was a collection of books from Paramount Books.



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