MAY 2010

QUIRK'S

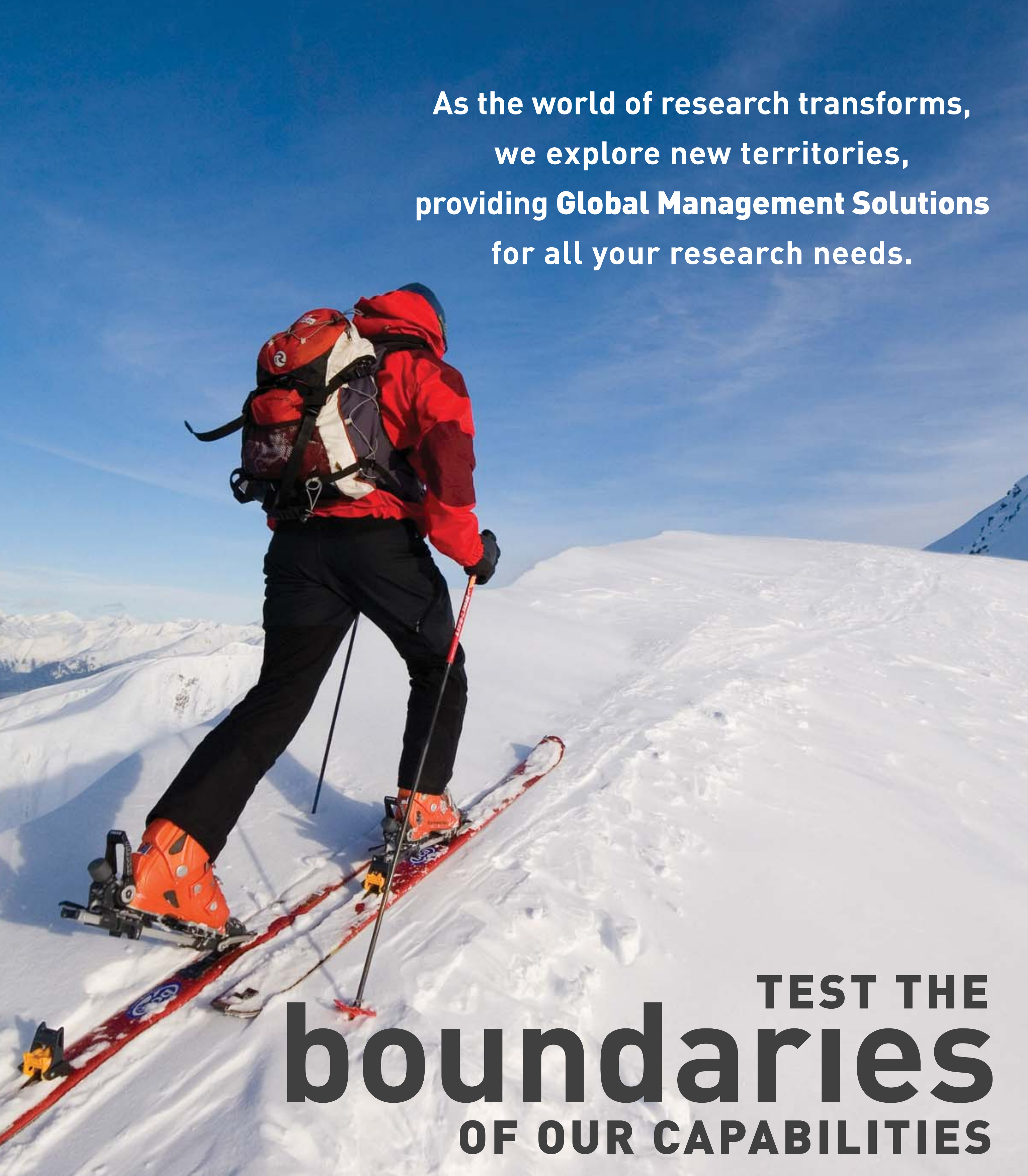
Marketing Research Review

Video-based qualitative steers Midas to better customer service

Also...

- Does tabletop shape affect focus group dynamics?
- The value of measuring MR ROI
- An ethnographic profile of the American HIVE

2010 Focus Group Moderator Directory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Quirk's Marketing Research Review
Volume XXIV Number 5

contents

case study

techniques

columns

departments

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in case you missed it...

news and notes on marketing and research

GM aims to make test-driving a pleasure cruise with new studios

As a testament to its latest "May the Best Car Win" corporate marketing campaign, General Motors plans to launch a multimarket test-drive program in 2010 that lets consumers drive both Chevy vehicles and the vehicles Chevy competes with in a relaxed, no-pressure environment, according to Karl Greenberg's March 11, 2010, article, "General Motors To Open The 'Un-Dealership'," for MediaPost. Called a Test Drive Studio, these minimally-branded locations will serve as permanent or semi-permanent brick-and-mortar facilities that house models such as the Malibu, Traverse and Equinox - plus comparable vehicles of different makes in each of the segments. In the Malibu category, for example, the facility would also offer test-drives in the Camry, Accord, Ford Fusion or Taurus.

The journey of purchasing a new vehicle is often wrought with the stress of wondering if you're making the right choice on an expensive purchase and tense situations with car salesmen pushing to send you home in a car today! Many potential customers are deterred from going out and test-driving new offerings for fear of being trapped in an uncomfortable situation. The Test Drive Studio, however, aims to create "a non-threatening environment," said Steve Tihanyi, general director for marketing services, alliances and branded entertainment at GM and the mastermind behind the new endeavor. "You get a really good cluster of vehicles to experience at your own pace."

The Test Drive Studios will be run on a pilot basis in Miami, Los Angeles, Philadelphia and Chicago. Look for them to be located in industrial zones or high-traffic retail areas and to have a laid-back feel, with Wi-Fi and a café or lounge. "Ultimately, we want it to be customer-friendly; we want them to feel good about being there. The last thing we want is people hovering over you. It will not look like a dealership and will not be branded Chevrolet," Tihanyi says.

Healthy, green, simple - trends to watch in the next 10 years

At the dawn of a new decade, critics question if the previous decade will be remembered as the Uh-Ohs instead of simply the Ohs and how the past 10 years will shape the next. Perhaps in response to the massive global fallout in 2008 - the effects of which are still evident - one can expect the next decade to be one of autonomy, understatement and an increased global conscience, according to trends identified by the Natural Marketing Institute, Harleysville, Pa.

Getting off the grid. A new spirit of self-reliance drives how consumers prioritize their spending and behave toward what they believe is purposeful, principled and powerful. Consumers are pursuing ways to become more self-sufficient, including household-generated energy; water conservation and purification; and private gardens.

Meaningful green. The green wave has penetrated the globe and almost every company and product claims at least a small place at the sustainability table. The challenge lies in achieving meaningful differentiation. Green initiatives must be distinctive, memorable and measurable to impact environmental, social and economic dimensions. Look for the meaning of green to move beyond the struggle of statistics (i.e., X percent less packaging, Y percent more energy efficient, etc.).

EcoTechMed. New economic realities are motivating many to take greater steps toward proactive health care rather than sick care and greater responsibility for their own health and wellness. Technology is enabling fully-customized and predictive prevention alternatives, including a blending of alternative and Western medicine.

Breaking the mold. Consumers are eating less meat, refusing vaccines, trading in the suburban castle for an eco-friendly urban flat and opting to manage one's own financial portfolio. In short, consumers are starting to reject traditional approaches.

Pure and simple. New trends in purity and simplicity are evident as we move to focused messaging, cleaner labeling, streamlined design and easy delivery. It's an attempt to get at the core of what is really needed. This less-is-more trend is resonating with values-driven consumers, eco-friendly enthusiasts and convenience shoppers.

The future is now. From aging infrastructures to population growth to climate change, we face a complex set of problems that threaten the population, economy and environment. We must solve the problems worth solving to create a livable future.

Commonwealth of connections. The aging population is driving societal shifts, resulting in a host of new products and services. New communities are being designed to help seniors stay local, active, safe, independent and connected to their world as long as possible.

Personal ROI. Consumers are demanding greater value from every product and service, and the demand extends into making the most of everything - including the investment of time and money. Value requirements transcend product cost and functionality to encompass fair trade, resource management and the efficacy and productivity of corporate social responsibility.

L.L. Bean goes viral on campus for feedback on new Signature line

After almost a century in business as the resident provider of all things preppy, outdoorsy and adult, mail-order retailer L.L. Bean has embarked on a journey to lure in consumers half the age of its average customer (50 years old). To ensure that L.L. Bean's new, more modern Signature collection would hit home with its target audience of 20- and 30-somethings, L.L. Bean accepted the help of 19-year-old college freshman Charlie Carey as a real-world brand ambassador in the Northeast to create buzz around the new line, gather feedback from his peers and provide input that would be used to help shape the future of the line, according to Jenn Abelson's March 15, 2010, article "With student help, L.L. Bean tries younger look," in the *Boston Globe*.

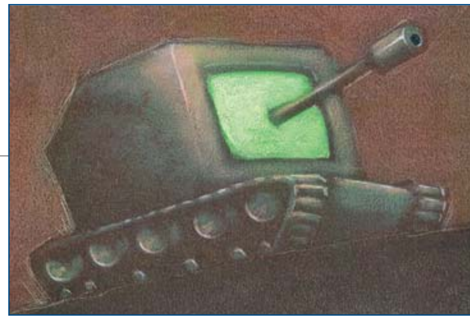
Carey approached L.L Bean asking to promote the collection among the campus crowd, but what originally started as a ploy to score some free threads turned into "Bean in the wiL.L.d," a grassroots, word-of-mouth marketing effort championed by Carey and a dozen of his friends at colleges in the Northeast. The team of students developed a private online forum where they write updates for L.L. Bean on how the clothes are fitting, what styles are working and post photos of the outfits they put together. L.L. Bean intends to use this feedback, along with other customer input, to drive style, marketing and price updates for the collection.

On the ground, the Bean in the wiL.L.d. team handed out catalogs, hosted trunk shows, wore the clothes and talked them up to the campus crowd. The team also organized a live sneak-peek event where they raffled off pre-sale merchandise and handed out $20 gift cards to more than 50 students combing through racks of piped wrap dresses, fitted polo shirts and other tailored wear.

The Signature collection will be a true test for L.L. Bean, as it goes head-to-head with J.Crew, Ralph Lauren's Rugby line and other specialty retailers catering to the khaki-chic audience.

war stories

true-life tales in marketing research



Editor's note: War Stories is an occasional column in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous anecdotes of life in the research trenches. Send your own (or a colleague's) tales of research-related wackiness to him at artshulman@aol.com. Contributors may remain anonymous. To view this article online, enter article ID 20100501 at quirks.com/articles.

Gary Brown of DDC Research tells a story from way back – in 1975 – when he was working for another company. He was in downtown Los Angeles doing a survey on saltwater fishing (no kidding) using door-to-door interviewing to estimate the number of fishing trips taken during the past year.

He worked in teams of two, with one interviewer and one security escort. On the final day of interviewing, his team was greeted at the very last household on the last block by a large, barking German shepherd behind a very, very low fence. Brown, the security part of the team, eyed the front porch of the house and said, "Look at those newspapers and magazines laying on the porch; nobody is home here. And I'm glad as hell cause the dog scares me to death. Hurray, we're finally done!"

But his coworker – a nearly 70-year-old female, clearly from the old school – adamantly pointed out, "We were told to visit every selected household on the block, and this house was selected so I'm gonna give it a shot."

She calmly opened the gate, petted the dog, rang the doorbell, found a saltwater fisherman inside and conducted an interview.

Brown stood outside the fence for the next 15 minutes being barked at by the German shepherd.

For those of you not aware, I am in show business in a way. I write plays and occasionally even act in them. I sometimes liken market research to show business. For example, when I'm about to leave my clients in the viewing room to moderate a group, I often announce as I leave, "OK, it's showtime!"

That's why I was so intrigued when moderator Melissa Van Ryzin sent in her war story.

About midway through the first of two groups she was moderating one evening she realized she was going to throw up! (This was not based on the material she was presenting. She was really sick.) Motioning to the group that she needed a moment, she held up a finger. Then she tore out of the room. She ended up throwing up on the floor in the hall and on herself before making it to the bathroom.

The viewing team (from her company) was wonderful. One of them sat in the bathroom, helping her clean up. Another went in to finish the group. Not the greatest idea, Van Ryzin indicates, since the team member (not a researcher) pretty much did everything wrong. But bless his heart, he kept the group going. He also moderated the second one despite her protests, but it made sense since the respondents already had arrived and Van Ryzin smelled of vomit.

Van Ryzin was told that after she left, the respondents briefly were concerned about her but soon resumed discussing the topic.

What does all this illustrate? In market research, like in show business, the show must go on!

Al Roberts of A.P. Roberts Associates was moderating a focus group of OB/GYNs on the topic of prenatal care. One participant, older than the rest, began trying to respond to virtually every question and to lecture the younger physicians. At one point, stressing the need for preventive medicine, he challenged the group with the question: "How often do you people have rectal exams?"

After a few embarrassing responses, someone asked him how often he had a rectal exam. He responded, emphatically and righteously, "Every six months!"

There was a moment or two of silence. Then Roberts asked him, "Performed by a physician, or some other, um, professional?"

The laughter went on and on.

Lee Boylan of Manzanita Market Research tells of the time she was conducting one-on-one interviews with people who had experienced bariatric (weight-loss) surgery. A woman who had undergone the procedure and lost a lot of weight was describing the extra flesh that remains after shedding excess pounds. To demonstrate, she stripped off her blouse.

Boylan blushed, but continued the interview as soon as the woman put her clothes back on!

So, what do you think? Would the woman have disrobed like that for a male moderator? | Q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Boomers and Gen X the most spend-happy; Millennials buy more per trip

Observers of popular culture have long known that in large part, generations look alike, think alike, dress alike, vote alike, live alike and share a similar attitude toward life and leisure activities. That theory certainly holds true for shopping. A recent analysis from New York researcher

The Nielsen Company of the four key generations revealed generationally-consistent shopping habits that reflect diverse lifestyle preferences and economic habits, according to a March 4, 2010, blog post from Todd Hale, Nielsen senior vice president, consumer and shopper insights, titled "Mining the U.S. Generation Gaps."

The Greatest Generation members (ages 64+ in 2009), shaped by the Great Depression and World War II frugality, are the most frequent shoppers and more deal-prone than other age segments. High-earning Boomers (ages 45-63) have the largest annual dollar spend per household of any group, followed by Gen X (ages 33-44). Millennials (ages 15-32) don't like to waste time in-store, shopping less often than other age cohorts but buying more per trip as a result. Millennial and Gen X shoppers favor mass supercenters and mass merchandisers over more traditional formats like grocery or drug stores, which remain a draw for the Greatest Generation and Boomers. When younger shoppers do check into a format, they make a big impression at checkout. Millennials topped the basket value list at grocery stores and mass supercenters, with Gen X taking top spending honors at mass merchandisers and drug stores. Millennials represent the largest population segment - over 76 million - just slightly larger in number than the Boomer segment. The two groups together represent half of the U.S. population. At club, dollar and convenience/gas channels, Boomers and the Greatest Generation populate the aisles more frequently, while younger shoppers offset fewer trips with bigger baskets.

Certain store banners hold a unique appeal for the younger generations, and Target is at the head of that retailing class. Target stores have managed to maintain a hip, trendy image with a strong value message with whimsical advertising; strong, almost pop-art in-store merchandising; and a roster of high-profile designers. And, with the interest in at-home meals, Target has partnered with TV cooking show host Giada De Laurentiis for a store-brand line of specialty food items and cookware. Gen X and Millennials both patronize Target more often than other age cohorts and also outspend them at Target, as well as at competitive mass merchandisers like Kmart and Walmart.

Research suggests that owning a pet can stave off loneliness and lower blood pressure. Apparently, the Greatest Generation got the message, which may account for the average $198 in annual spending among pet-food buyers in these households. The next-largest spending categories for seniors were wine, at $124 per year, and vitamins, at $107 per year. Boomers spent even more on pet food ($211 per year), followed by carbonated beverages ($140 per year) and wine ($125 per year). Pet food also topped the list for Gen X at $148 per year, with carbonated beverages a close second at $134 per year and baby food in third at $127 annually. Millennials and their young families placed baby food in the top spot with annual outlays of $170 per household, followed by carbonated beverages ($116 per year) and pet food ($112 per year).

Most households (53 percent) have favorable attitudes toward grocery shopping, but 38 percent consider it a chore. The Greatest Generation is least likely to enjoy shopping, yet also the most likely to walk up and down each aisle on a shopping trip, thus extending their time in-store. Conversely, the Millennial generation, who make the fewest trips to virtually any format, really like shopping. On a typical mission, they know how to find what they need and are less likely to shop the entire store.

Shoppers are proving to be rational consumers with more than half relying on shopping lists and consistently comparing the unit price for a product. Other ways consumers attempt to milk value out of a shopping trip include using the store circular to identify sale items and redeeming coupons - a practice that has spiked in popularity thanks to the advent of electronic and mobile coupons.

While Gen X and Millennials claimed the highest coupon redemption rates and were among the most likely to use shopping lists for most trips, they also admitted to making the most unplanned purchases on their shopping excursions. Younger shoppers tended to bring children with them more often than others; were less likely to ask for advice from meat or produce department personnel;

continued on p. 59


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names of note

Rochester, N.Y., research company *Harris Interactive*'s **Frank E. Forkin** has left his position at the company as president, client services, North America.

Sentient Decision Science, a Portsmouth, N.H., research company, has hired **Derby Swanson** as director, market research.

MTV Networks, New York, has named **Suzanne McDonnell** senior vice president, digital fusion. Separately, **Heather Hopkins** will assume the role of senior vice president, marketing and sales development, in addition to her role as general manager, Tribes vertical ad network.

Eric Levin has joined *Integrated Marketing Associates LLC*, a Bryn Mawr, Pa., research company, as vice president. **Victoria Waldman** has also joined the company as senior project director.

Levin **Walker**

Atlanta research company *CMI* has named **Samantha Walker** manager, marketing science.

Marketing Research Services Inc., Cincinnati, has hired **Jennifer Wehr Holt** as senior project director and **Dan Schork** as project director.

Quick Test/Heakin, a Jupiter, Fla., research company, has named **Jil Hinds** manager and **Andrew Wobensmith** project manager, 3Q research solutions. **Nichole Benton** has also been promoted to manager.

David White has been appointed director, syndicated services, of *The Research Partnership*, London.

Stockholm, Sweden, research company *Cint* has named **Richard Thornton** director, global sales; **Clare McHatten** associate director; and **Valérie Lejeune** project manager. The three will be part of Cint's U.K. team.

Chicago research company *Synovate* has hired **Clayton Buckley** as managing director for its offices in the United Arab Emirates, Saudi Arabia and Iran.

ConsumerInfo.com Inc., an Irvine, Calif., division of Dublin, Ireland, research company Experian, has appointed **Chris X. Moloney** as senior vice president and CMO for the U.S. Experian Consumer Direct business unit.

Pierre Bouvard, of Columbia, Md., research company *Arbitron Inc.*, has been elected chairman of the board of the IRTS Foundation, a New York media and entertainment foundation.

Reston, Va., research company *comScore* has hired **Joan FitzGerald** as vice president, television sales and business development.

Don Morrison has been appointed vice president, international markets, of *ForeSee Results*, an Ann Arbor, Mich., research company.

ComRes, a London research company, has named **Peter Harlock** CEO and ComRes Founder **Andrew Hawkins** executive chairman.

New York research company *WorldOne Inc.* has hired **Matt Campion** as executive vice president and **Kim-Fredrik Schneider** as senior vice president. Schneider will be based in London.

Voxco, a Montreal research company, has appointed **Juergen Hessdoerfer** as managing director, Voxco GmbH.

Hessdoerfer **Davis**

Debora D. Davis has rejoined Baltimore research company *Observation Baltimore* as director, finance.

Bryan Black has joined Dallas research company *e-Rewards Inc.* as senior director, human resources.

Columbia, Md., research company *Arbitron Inc.* has made several appointments to the Arbitron Radio Advisory Council: **Erik Hellum**, **Frank Osborn**, **Craig Jacobus**, **Dan Savadove**, **John Fullam**, **Deon Levingston**, **Jeff Liberman**, **Gary Stone**, **Amy Vokes**, **Deb Esayian**, **David Landau** and **Bill Davis**.

Junghwa Lee has joined *Kantar Health*, a New York division of Fairfield, Conn., research company The Kantar Group, as general manager, Korea.

Lightspeed Research, Basking Ridge, N.J., has appointed **Amer Lotay** as project manager. Lotay will be based in the company's Wimbledon, U.K., office.

John Maslen has been named brand director of *Sewells Information and Research*, Peterborough, U.K. Additionally, the company has appointed **Sarah Tooze** to its research team and **Jacqui Barker** as leader of its sales operation.

continued on p. 66

product and service update

Clarabridge launches beta of its self-service text-analysis tool

Reston, Va., research company Clarabridge Inc. has beta-launched Clarabridge Self Service, a product designed to enable smaller organizations, departments and/or market research firms to upload and analyze their text-based e-mails and survey open-end verbatims, transcripts, social media content and other textual data sources via a self-service online portal. The portal builds on the technology of Clarabridge Enterprise, which focuses on customer experience management and other text analytics initiatives for large enterprises.

With the introduction of Self Service, any organization can use the same Enterprise natural language processing (NLP) technology on its customer feedback and textual data. Clarabridge Self Service is intended to automatically organize text into categories; determine multiple levels of positive and negative sentiment; identify emerging trends; and include online interactive exploration, reporting, exporting and root-cause analysis features.

Clarabridge Self Service aims to enable automatic linguistic reading of text and ad-hoc searching and filtration; categorization of the text at detailed sub-document, sentence and clause levels; identification of varying levels of positive and negative sentiments and what they relate to; analysis of root-cause, emerging issues and trends; and capability to drill down to the original text to understand any areas of interest. The solution also comprises an upload wizard, NLP engine, navigator, classification suite, sentiment scoring and reports. For more information visit www.clarabridge.com/selfservice.

Brand Advisory Communities aim to get women buzzing about brands

SheSpeaks, a New York woman-centric online communities company, has debuted Brand Advisory Communities, an offering that builds market research communities designed to allow marketers to directly engage with target consumers on a long-term basis. SheSpeaks will connect participating brands with targeted communities of 2,000 or more consumers for 12+-month-long programs that provide qualitative insights and quantitative surveying capabilities. Communities will be recruited and managed on an ongoing basis by SheSpeaks.

The SheSpeaks Brand Advisory Communities offering is intended to gather quantitative research and qualitative insights from consumers; inform product branding and marketing, including logo testing, pricing, packaging, ad concepts and spokespeople; engage consumers in evaluating new product ideas; and engender brand advocates via exposure to communications and messages. For more information visit www.shespeaks.com/corp.

Want your ad to go viral? Check your Creative Viral Potential

Naperville, Ill., research company Millward Brown has introduced the Creative Viral Potential (CVP) metric, a pre-testing metric to help marketers predict the likely viral viewing of video advertising. CVP was developed through research that analyzed behavioral viewings data from YouTube for 102 video commercials alongside survey-based pre-test measures. The research uncovered four essential components to viral success: the Awareness Index, a measure of branded engagement that has been used by advertisers to predict the success of their TV advertising; Buzz, which identifies whether an ad is likely to generate pass-along; Celebrity, the profile of a celebrity when used in an ad; and Distinctiveness, a measure of originality. For more information visit www.millwardbrown.com.

Outdoor audience measurement tracks consumers on the MOVE

The Outdoor Media Association, New South Wales, Australia, along with outdoor media companies APN Outdoor, EYE, Adshel, JCDecaux and oOh!media, has released a national, industry-wide audience measurement planning tool for outdoor media in Australia. Dubbed MOVE (Measurement of Outdoor Visibility and Exposure), the tool is designed to cover all major formats and environments, including roadside billboards, posters, street furniture, railway stations, transit, shopping centers and airports.

Key features of the MOVE system include outdoor media inventory measured across the five markets of Sydney, Melbourne, Brisbane, Adelaide and Perth; a cross-format planning tool to produce audience measurement results for any combination of formats and/or markets against 110+ demographics; data stored on a cluster of 32 computers from which audience measurement results are generated; and mapping technology.

MOVE also features a database comprising site characteristics of 60,000 advertising faces; Australian Bureau of Statistics Census population statistics; travel information of 600,000 individual person trips sourced from 68,000 government household travel surveys; land-use information; survey results of 15,000 respondents used to determine movement within airports and shopping centers, as well as trip variability over time; and eye-tracking studies. For more information visit http://oma.org.au.

Arbitron expands educational offerings with training series and reports

Columbia, Md., research company Arbitron Inc. has launched an educational series that includes insights on Out-of-Home Video Advertising

continued on p. 62

research industry news

News notes

Vinod Gupta, founder and former CEO of Omaha, Neb., research company **Infogroup**, agreed in March 2010 to pay $7.4 million to settle federal regulators' charges claiming he siphoned $9.3 million from the company to finance a lavish lifestyle. Gupta settled without admitting or denying wrongdoing.

Acrobat Research, Toronto, has closed its Calais, Maine, call center, eliminating approximately 40 positions. The company cites a shrinking customer base as its reason for closing.

Jordan research companies **YouGovSiraj** and **Analyseize** have signed a memorandum of understanding, under which both organizations will conduct joint research projects; exchange data and expertise; and develop and produce projects that serve the needs of the Arab world, specifically the Jordanian market.

New York research company **Ipsos North America** has redesigned its Web site (www.ipsos-na.com). The redesign aims to offer more user-friendly functionality tools, greater profiling of key researchers and easier access to contact information.

Decision Insight, a Kansas City, Mo., research company, has partnered with the **United Aid Foundation**, New York, to assist in the Haiti relief effort.

2010 marks the 25th anniversary for **Q&M Research Services**, Chicago.

Polaris Marketing Research, Atlanta, has implemented a green initiative, which includes internal policies designed to reduce the company's carbon footprint and achieve a more environmentally-friendly workplace.

Calendar of Events has moved to page 118

Acquisitions/transactions

One to One Interactive Inc. (OTO), a Boston digital marketing firm, has acquired London research company **fhios**. OTO will incorporate fhios' user experience, research and design practice with its OTOinsights and Quantemo platforms.

Omaha, Neb., research company **Infogroup** has agreed to be acquired by affiliates of **CCMP Capital Advisors LLC**, New York, for approximately $635 million, including the refinancing of Infogroup's outstanding debt.

New York researcher **The Nielsen Company** has purchased **USP Market Intelligence**, a Munich, Germany, research company. Terms of the transaction were not disclosed.

Paris research company **Ipsos** has agreed to take a 25 percent stake in Portugal research company **Apeme**. As part of the agreement, Ipsos will have the option to buy the remaining 75 percent in five years.

Millennial Media, a Baltimore mobile advertising network, has acquired **TapMetrics**, a San Francisco research firm.

Port Washington, N.Y., research company **The NPD Group** has acquired **Solarbuzz LLC**, a San Francisco research firm. Solarbuzz will operate under its current name, and NPD's DisplaySearch division will be folded into Solarbuzz.

Alliances/strategic partnerships

New York research companies **Mediamark Research and Intelligence** and **The Media Behavior Institute** have entered into a strategic partnership to launch a syndicated, consumer-centric, multimedia database intended to improve how media is planned, bought and sold.

ACNielsen HCI, a Princeton, N.J., research company, has joined the Insights practice of **Kantar Health**, a New York division of Fairfield, Conn., research company The Kantar Group.

Association/organization news

The Marketing Research Association (MRA), Glastonbury, Conn., has launched its Professional Researcher Certification (PRC) Provider Program, which allows companies to submit their education programs for PRC approval. For more information visit www.mra-net.org/prc.

Additionally, New York research company **WorldOne Inc.** has completed an independent review of its internal processes and performance metrics through the MRA's Internal Review Program.

ESOMAR, Amsterdam, the Netherlands, has initiated its Young Researcher of the Year Award, which aims to showcase new and innovative market research from young talent and address pressing and challenging global issues. The topics for the 2010 award will be AIDS/HIV and children and youth; sustainable energy; and the digital divide. Entrants must be under

continued on p. 64

By Sharon Seidler

Qualitative research panels: a new spin on traditional focus groups

In conducting qualitative research, asking the right people is often as important as asking the right questions.

For example, custom advisory panels have been all the rage in the research industry over the past five years - and with good reason. They provide companies with relatively easy access to inexpensive advice and opinions from key consumers and customers. However, almost all of the focus has been on online panels that are relatively large, with a scale that can support a variety of online research endeavors, including quantitative surveys.

But for some companies, the same efficiencies of custom online panels can be achieved with the use of qualitative research panels. By establishing more focused panels, researchers are able to provide some worthwhile payoffs and efficiencies to these companies.

The basic principal behind a qualitative research panel is to establish a group of about eight to 12 qualified respondents who agree to participate in a series of interviews on a given product, service or topic. Once recruited, the same group of respondents would then agree to meet about once a month for what could turn out to be a six-month period. The approach is simple and efficient: invest in a single recruitment and leverage the same respondents for a number of qualitative research projects.

This model is quite different from the traditional focus group method used by most qualitative researchers in that respondents who've participated in research groups within a given six-month time frame are not rejected out of hand. Some research firms are breaking away from this long-standing tradition and developing proprietary respondent validation tools to help keep qualitative respondents honest. Working under this new paradigm might make some researchers a little uneasy, but it's important for the researchers - and their clients - to understand the benefits that an established qualitative research panel can provide.

One primary benefit is that the menu of topics can be varied and broad and can occasionally be revisited in a kind of longitudinal investigation. As an example, let's propose that a consumer packaged

Editor's note: Sharon Seidler is senior vice president of C&R Research, Chicago. She can be reached at sharons@crresearch.com. To view this article online, enter article ID 20100502 at quirks.com/articles.

snapshot

Engaging the same group of respondents for an ongoing set of interviews can save money, help foster camaraderie among participants and impose discipline on internal client-company teams.

goods company is seeking to launch a new line of salad dressings. Its qualitative panel starts out first with the seeds of new ideas for a line of salad dressings. The next session, in the following month with the same participants, refines those ideas to the point where packaging, graphics and samples begin to take form and come to life. And even before the subsequent session, advertising stimuli boards can be created, names generated and the product line begins getting its legs. This, ultimately, can save time and money for a CPG company in the long run.

Many companies are embracing the panel approach because they recognize the multiple benefits:

- Consumer panels can be significantly less expensive versus recruiting the same number of separate groups over the same time period. Because the same people are used each month, there are no additional recruiting costs – only simple reminder calls are required. This more streamlined design can result in a 25 percent to 30 percent reduction in cost to clients.
- Because quick feedback is critical, and the entire process is so fluid, the company doesn't require a full report. A topline summary works well and can be delivered just a few days after the panel convenes.
- Companies also appreciate the discipline that consumer panels can impose in the process. They know that each month they need to meet with marketing, packaging and R&D to determine what issues still exist. Meanwhile, the various internal departments welcome the concept of having a voice in the panel content each month.
- Respondents are better able to build ideas as they become more invested in the process and the topics. In some cases, the participants bond with one another nicely, and the time often needed to warm them up at the beginning of the session is significantly reduced.
- Participants tend to remain fresh, motivated and more inclined to evaluate. They are still wearing their consumer hats, and usually haven't devolved into thinking of themselves as budding marketing professionals.

Provide benefits

Breaking the long-established rules of qualitative recruiting can provide benefits for both the research team as well as the companies seeking input on a wide variety of issues. The process has proven successful in forming bonds with consumers, making them allies and sharing ideas in a new and more intimate way. Additionally, the findings have been solid, and there has been little compromise as a result of interviewing the same people again and again. And, given the potential cost savings in this current economic climate, more companies will continue to see great value in qualitative research panels, which can put qualitative research on a whole new track. | Q

By Stephen J. Hellebusch

Under the influence

In the book *Predictably Irrational* by Dan Ariely, a study is described which reveals something very interesting about the effect of context on how we make decisions. Knowledgeable and very intelligent people who were fully aware that certain numbers were chosen in a completely arbitrary, random fashion were still influenced by those numbers when making decisions about what they would pay for certain items. This is described as arbitrary coherence, a term found in the behavioral economics literature. This is so illogical that I replicated it to see for myself, as described in this article.

This influence on bright people who "knew the story" has implications for marketing researchers. If, as has been demonstrated, irrelevant context can have an impact on responses even when the responder knows it is irrelevant, it suggests that marketing researchers must work harder to compensate for this factor.

Many marketing researchers are familiar with the standard "AB-BA" balancing pattern. In taste-tests between two products, for example, half of the respondents taste A first, B second, and half taste B first, A second. We look at the total, which is balanced, and usually look at the two cells (A1-B2 and A2-B1) to see if order effects exist. (They often do!) Arbitrary coherence suggests it would be wise to employ the same logic more widely. This possibility is discussed at the end of this article.

Method

Basically, in the original study, MIT students were asked three questions about several items that might be purchased in a store. However, the first step they were asked to take was irrelevant: to write the last two digits of their Social Security number (SSN) in dollars next to the item. So, if their SSN ended in 12, they wrote $12. If it ended in 87, they wrote $87. Next, they were asked to indicate whether they would pay that amount for the item (yes/no). Finally, they were told to pretend the item was being auctioned and to write in the amount they would be willing to pay.

Replicating this research required a call for volunteers, and 71 of the author's associates at Directions Research Inc. responded. This replicates the reported study in that the respondents were, for the most part, highly educated professionals.

The first step was to select items. Four were randomly selected from

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snapshot

The author replicated an experiment from *Predictably Irrational* to better understand the impact that arbitrary coherence might have on marketing research studies.

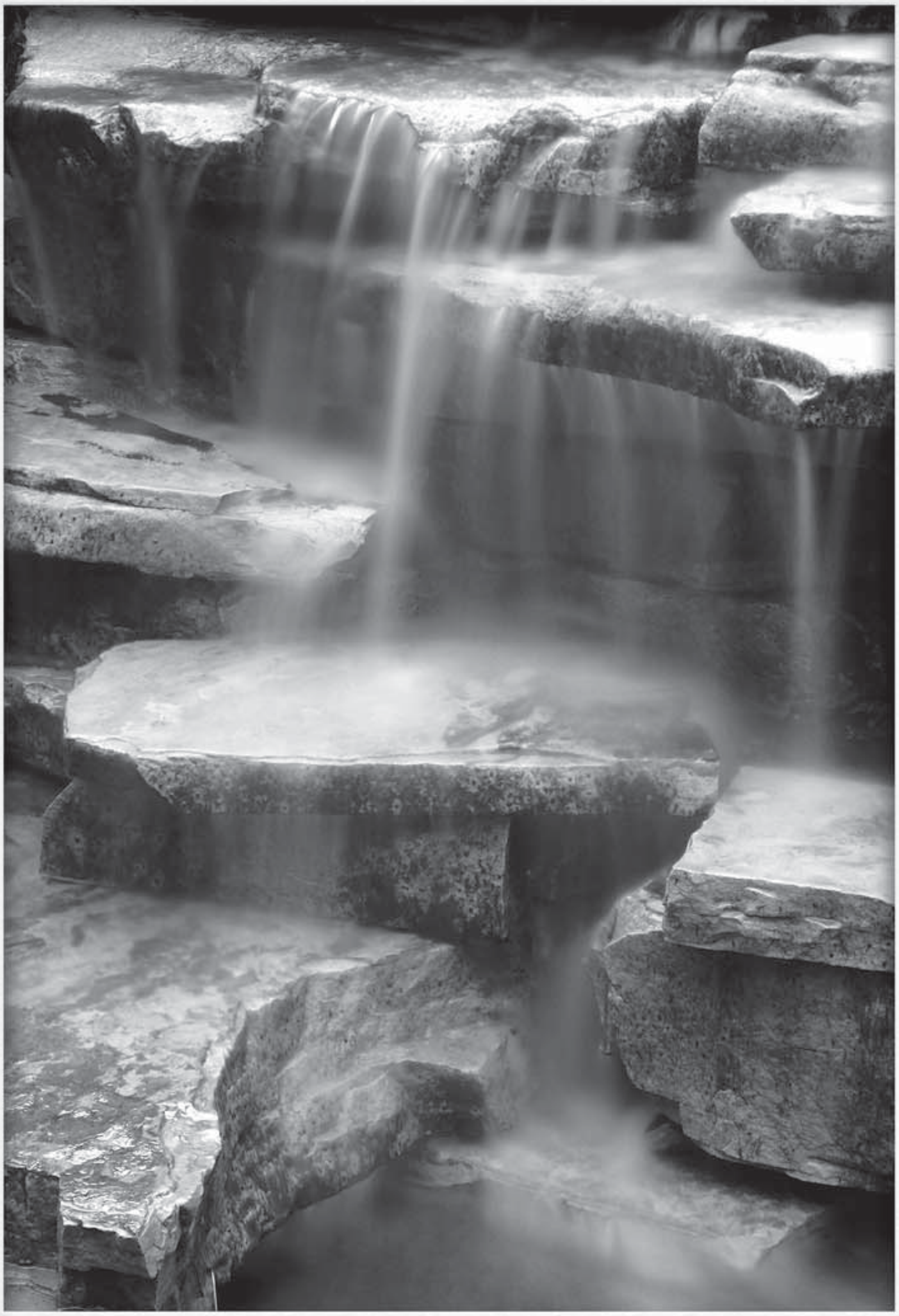


Table 1: Basic Replication Findings

Products	Social Security Number as $: Last Two Digits Ranges				
	$00-$25	$26-$50	$51-$75	$76-$99	Correlation
Teleflora	$22.13	$43.29	$38.70	$40.79	+0.33
Dr. Scholl's loafers	$34.13	$34.07	$49.45	$51.53	+0.28
Baileys Irish cream	$15.50	$16.93	$16.75	$20.42	+0.16
Irish Spring 12-pack	$5.63	$9.50	$6.10	$6.21	-0.05

Table 2: What Percent Is Willing To Buy for SSN As $ Price?

Products	Social Security Number as $: Last Two Digits Ranges			
	$00-$25	$26-$50	$51-$75	$76-$99
Base - no. per group	*16*	*14*	*20*	*19*
Teleflora	87.5%	85.7%	15.0%	5.3%
Dr. Scholl's loafers	75.0%	64.3%	45.0%	21.1%
Baileys Irish cream	68.8%	14.3%	0	0
Irish Spring 12-pack	18.8%	0	0	0

the Sunday newspaper FSIs: a 12-bar value-pack of Irish Spring soap; one pair of Dr. Scholl's hand-stitched leather loafers; a 750ml bottle of Baileys Irish cream; and a Teleflora Spring Pitcher floral display.

The respondents filled out a self-administered questionnaire that asked them to write down the last two digits of their SSN as if they were dollars, then asked whether they would buy each of the items for that amount, and for the amount they would be willing to pay if the item were being auctioned.

Results

The results from *Predictably Irrational* are quite uniform. Six varied items – computer elements (trackball, keyboard), a book, edibles – are reported, and the average price willing to pay is categorized by the last two digits of the SSN. The results show that having the arbitrarily-chosen SSN "price" near at hand leads respondents to bid higher and higher in the auction. As the SSN price rises, so does the average amount people are willing to pay. The correlations between the SSN price and the price respondents would pay ranged from a low of +0.32 to a high of +0.52. Those are the type of results expected for the four products used in this replication attempt.

Clearly, the results shown in Table 1 are a little different than expected. For the Teleflora display and the Dr. Scholl's loafers, results are very consistent with what has been reported. With these two items, the earlier research is successfully replicated.

With the Baileys Irish cream, not so much. A much weaker pattern of average price increase with increasing SSN price is found, and the correlation is much weaker than any previously reported. For the Irish Spring 12-pack, the phenomenon breaks down completely, and the correlation is close enough to zero to say there is no correlation.

One of the questions about the summary report described in *Predictably Irrational* is "What percent were willing to buy the items for the SSN dollar price?" That finding is not reported. In this case, however, many were still willing to buy Teleflora at the highest prices, and some stayed with Dr. Scholl's loafers to the highest level. But no one was willing to pay over $50 for 750ml of Baileys, and no one was willing to pay $26 or more for 12 bars of soap. At least at Directions Research Inc., people are not irrational.

Generally speaking, as prices go up, a smaller and smaller percent is willing to buy, as expected. Some stayed with Teleflora and with Dr. Scholl's loafers, but the percentages who did so drop sharply after the $50 price point (Table 2).

Finally, there was speculation concerning what the initial results (Table 1) would look like if the data were restricted to only those willing to pay for the item at the SSN price. This required new (and small) base sizes for each item in each price class.

Table 3: Basic Replication Findings					
	Social Security Number as $: Last Two Digits Ranges				
Products	**$00-$25**	**$26-$50**	**$51-$75**	**$76-$99**	**Correlation**
Base - no. per group	*14*	*12*	*3*	*1*	
Teleflora	$24.57	$47.50	$70.00	$85.00	+0.93
Base - no. per group	*12*	*9*	*9*	*4*	
Dr. Scholl's loafers	$45.08	$45.00	$75.89	$108.50	+0.74
Base - no. per group	*11*	*2*	*0*	*0*	
Baileys Irish cream	$20.45	$59.00	0	0	+0.73
Base - no. per group	*3*	*0*	*0*	*0*	
Irish Spring 12-pack	$7.67	0	0	0	NA

Interestingly, the phenomenon is still seen for Teleflora and Dr. Scholl's when this restriction is made, even though the numbers in each group get very, very small. Also interesting is the fact that, with items that most would believe are lesser values, no one was willing to buy at the highest prices, so there is no "average price" respondents are willing to pay (Table 3).

Arbitrary coherence exists

Overall, the replication demonstrated that arbitrary coherence exists. The research was replicated, to a degree. For the items of lowest interest (Baileys Irish cream and Irish Spring 12-pack), it did not work quite so well, suggesting that there are other factors at work. For an inexpensive item that everyone knows is inexpensive (i.e., soap), it did not work at all. So, the hypothesis to be tested is that arbitrary coherence works when we have a high degree of uncertainty about the cost of an item, but does not work so well - we are not influenced by the random number - when we are assessing an item that has an approximately known price.

If a known, irrelevant context has a definite effect on responses, at the very least those who write questionnaires should be made aware that this is so. There may be ways to deal with the concern. One that comes to mind is to balance, rotate or randomize sections of related questions within a questionnaire, as well as the continuing the standard use of these methods within appropriate sections. Obviously, not every section of a questionnaire is movable, since the flow cannot be reduced to gibberish, but there may be many interchangeable sections that the designer would not think to interchange, seeing no reason to do so.

Similarly, at least for the most important projects, multiple interviewing modalities may be a good idea - conduct some interviews online, some by phone, some in person. If the results are similar, it removes or reduces the concern that some unknowable context effect is at work. Once, this would have been considered ridiculous, just because of added expense. Now, we know there is a reason: Context known to be completely irrelevant can have an effect! | Q

> qualitative research

By Joseph Rydholm

Steering in the right direction

Insights from video diaries help Midas in its drive for better customer service

Next to visiting the dentist, taking a car in for service likely ranks among a consumer's least-favorite tasks. You know it will probably cost a lot more than you want it to; you likely won't understand everything that gets done to your car; and the second you drive away you'll start dreading the time you have to do it all over again.

Itasca, Ill.-based Midas Inc. is one of the best-known providers of automotive services, offering brakes, maintenance, tires, exhaust, steering and suspension repairs at nearly 2,400 franchised, licensed and company-owned Midas shops in 16 countries, including more than 1,600 in the United States and Canada. Though he works for Midas Inc., Garry Rosenfeldt is the first to admit that some of his company's customers could have the same uneasy feelings about visiting a Midas shop. "As an industry, we are typically not known for warm and fuzzy customer service," says Rosenfeldt, the firm's director of marketing research.

But car owners may soon begin looking at Midas in a different way. Since 2008, Rosenfeldt has used two large-scale qualitative research projects to help show the company's franchisees how bad things are in the auto service realm and, more importantly, how good things could get if shop managers started adhering to a set of basic service guidelines and behaviors that have now become a fundamental component of a broader retail operating model called the Midas Way.

Editor's note: To view this article online, enter article ID 20100504 at quirks.com/articles.

snapshot

Securing buy-in from influential franchisees was just one of the benefits that Midas researcher Garry Rosenfeldt reaped when he turned to qualitative research to develop a new service model.

Better received

When initial discussions were held about undertaking a project to research and document the state of customer service in the car repair business, Rosenfeldt knew that the edicts to improve service would perhaps be better received internally if they were in the consumers' own words rather those of Midas corporate. "It occurred to me that the best way to get franchisees on board is to have somebody else basically say what they should be doing and hey, wouldn't it be great if that 'somebody else' happened to be real, live customers?"

Qualitative was naturally a first thought for getting in-person feedback from customers but Rosenfeldt says that previous efforts to convene customer focus groups for franchisees didn't go well, as many shop owners don't have the luxury of being away from their businesses for extended periods of time.

Instead, a better way was to enable consumers to do the talking to video cameras in the privacy of their own homes. For the first project, Rosenfeldt recruited all of the respondents himself. He went to an electronics retailer and bought 150 video cameras and sent them out with instruction packets.

The goal was to learn about the ideal car repair service, not just at a Midas location but anywhere, so respondents had to complete a handful of tasks. For the first assignment, they were asked to look at scores of photos that represented many of the things that could happen in an auto service experience and express their thoughts - have they experienced the same thing, what did they think about it, etc.

Next they were asked to make an appointment for some kind of car service - an oil change, new brakes, etc. - at any service provider of their choosing and explain why they chose the shop they did, whether they had been there before, what they expected to happen, how they expected to be treated, etc. After the service, the consumers gave a wrap-up of how things went, including what was good, what was bad, what could have been better.

Rosenfeldt edited the hundreds of hours of videotape down to the most important, impactful responses and set about distributing the video to franchisees over the Midas corporate Web portal, on DVDs in the mail and via various road shows to explore and explain the results to internal audiences.

The franchisees' response? "We found that it was among the best, most effective research projects we've

ever done, for two reasons. One, we learned a lot more than we typically have about what the ideal customer experience should be. And two, the success we had in actually converting and convincing our franchisees was so beyond our expectations as to be almost unbelievable. It spawned a complete reassessment of our corporate strategy and what direction we were going, where we were spending our resources and how we were operating as an organization," Rosenfeldt says.

The bad news was, there weren't a lot of positive feelings about the auto repair experience. The good news? Lots of opportunity to move ahead of the competition. There was nowhere to go but up, and Midas wasn't alone in underachieving. "It was eye-opening to realize just how low the bar was, how bad the industry was perceived and how much upside there was if we made even the smallest changes. The bar is not just low for us but for the entire category. Even if we did the most minor things it would make us so much better than everybody else," Rosenfeldt says.

Test its effectiveness

With the first batch of customer video diaries having been a smashing success, leading to the development of a more focused service model (more on that later), the next step was to implement the model and test its effectiveness, Rosenfeldt says. "We needed to go back to the customers and say, 'We heard what you said. Here is what we have done. Is it correct? Are we doing the right things?' "

A group of Midas shops in the Northeast had begun executing the new service model, so the setting was perfect for a new round of video data-gathering in which respondents would visit these shops and report on their experiences. But, with fresh memories of the massive undertaking that was the first project, Rosenfeldt was a bit, er, hesitant. "The thought of going through that same procedure and process and hassle as the first time was so nauseating to me that we almost didn't do it," he says.

However, thanks to a certain research industry publication, he found an easier way to complete the second project by tapping QualVu, a Golden, Colo., provider of online video-based qualitative research services. "Around that time I was flipping through *Quirk's* and saw a blurb on QualVu, and I'm like, wow, these guys do everything that we have done but they take it to the next level. Particularly, they have a platform that the consumer's video is posted to and you can filter it and view it and respond to it. That was enough for me to call them and say, 'We need to work together on this project.' "

QualVu recruited respondents and distributed cameras to them. Rosenfeldt kept internal audiences informed of the project's progress using the Midas Web portal and relayed instructions on how to use the QualVu site to view customer videos. "The QualVu platform is very intuitive and open, not only to me but the franchise organization, which makes the whole process of research more transparent, more believable, more acceptable. [The franchisees] understand it more, they recognize why we say the kinds of things we say. The dealers and senior management were able to log into this system and see the customers' comments. And the feedback that I got was even better than the first time around.

"Basically we are no longer going to be doing traditional focus groups for the most part, because the drawbacks are great. This new process will not replace them 100 percent of the time, but most of the projects that we do require franchisee buy-in, and you just can't get it with a regular focus group so this is going to be our new default procedure."

Huge difference

As for the findings, Midas learned that it got the service model correct. "Customers did in fact notice a huge difference in the way the stores operated. So much so that when we were at our annual convention in November, we presented these results there and people were floored. They couldn't believe it. They completely bought into this process, which is testament to the power of listening to the voice of the consumer."

Rosenfeldt says that Midas certainly could have learned the same things through traditional qualitative but the immediacy of the feedback afforded by the online platform, and the level of access that franchise owners and other interested parties had to the data, made securing the all-important buy-in much easier.

The franchisees who were selected to have access to the video generated from the customer diaries had seen the question guides and were familiar with the purpose of the research. In some cases they were able to view feedback from customers of the Midas shops under their control, which certainly enhanced the impact of what the respondents were saying.

"What QualVu brought to the table was the ability to get more people to buy into and participate in the research process. That just made all the difference in the world, particularly for our organization, which is probably unique in some respects to other, non-franchised companies where people will do what you tell them. In our case, they don't. We have to convince them, so this is really the perfect service that they are offering that allows us to do that.

"That's the biggest career challenge that I've had. Doing the research is easy. It's getting the people to actually listen to it and react to it that's the hard part."

Best and worst

For the QualVu project, general-population consumers were recruited as were customers of Midas shops in the New England states that had adopted the new service model. They were sent Web cams and asked to answer a series of questions on topics such as their best and worst auto service experiences. Respondents were given a copy of the new service model (without the Midas name attached to it) and asked if they felt it was unique, how they would feel if their auto service provider executed the same service standards, etc., and if anything was missing from the current service model.

Once they had seen the new service model, they then were instructed to have their car serviced at a Midas shop that had adopted the new protocols and report back. (As a control, some respondents were also sent to shops that were still operating under the old standards.) Did the process match what was written in the service model? Was the experience different from what they had experienced at that Midas in the past?

One of the biggest outcomes of all of the research, Rosenfeldt says, is the discovery that the interaction with shop employees is the source of much of the fear surrounding car repair. "It's about the actual human being standing behind the counter. All the power is on them and we actually went as far as to say that to franchisees: 'We don't care about you, we care about your employee, your manager, who is actually the one who will make or break this business going forward.' It was a good choice because it's absolutely true - when you walk into those stores, if you don't like the guy behind the counter, we're in trouble."

The notion of treating each customer transaction as a unique, one-time event is long gone, Rosenfeldt says. For Midas, the focus is now on building long-term relationships, getting customers to come back and providing total car care. "We are now in the preventive maintenance business, such as oil changes, which people come in more frequently for. The problem is, the oil changes are $21; brake jobs are $300. The margin is significantly lower on oil changes. If you come in once for an oil change and we treat you poorly, and you don't come back, we're going to lose money on the proposition. So our whole model now is to get them in the door with an oil change, wow them with our customer experience and have them come back again and again for more oil changes and more expensive work. When the shops have adopted this model of service, to focus on the long-term relationships rather than the short-term profit, the shops make substantially more money over a longer period of time."

'Ridiculously simple'

Three main components of the Midas service model are greet, explain and thank. "When you are a shop manager and a customer walks in the door, you need to do three things: greet them, explain what you are doing and thank them," Rosenfeldt says. "It sounds ridiculously simple, but it almost never happens in this industry. We have found that when shops are able to execute those behaviors consistently, our customer satisfaction goes way up. Our customer retention goes way up and people come back and they purchase more services from us."

To be sure, "greet," for example, goes well beyond just saying hello. "There is a whole new process around what an exceptional greet looks like. It encompasses the way the whole shop looks, the amenities that you have available, the tone of the way you talk to the customer, how quickly you are acknowledged as a customer," Rosenfeldt says.

For the "explain" portion, it's all about listening and responding. The manager has to tell the customer what repairs were made and why, no matter how minor. "The customers appreciate when the manager actually says, 'Here is what we did and here is why. Do you have any questions?' Even if it's just for an oil change - take them to the bay, show them the emptying out of the old oil, talk to them about the different types of oil there are. If you've been to a Jiffy Lube, they do a lot of this stuff but Midas is not a quick-lube place and we were not set up for that and so those behaviors were not ingrained in the employees' brains but that is something we are getting better at and are working on now."

In addition, there is a specific script in which managers ask if the customer is comfortable with what was done, if they need something re-explained, etc. "They are trained to not let the customer out of the door unless they completely understand what happened. The benchmark for success, when we do some quantitative customer research, is, would you be able to explain what happened at Midas to your mother? If they say yes, then we are happy that it was explained correctly. If they say no, then we haven't done our jobs."

The "thank" includes, of course, thanking them for coming to Midas, perhaps a coupon for a return visit, and a conversation about setting up the next appointment.

Effective video snippet

While a goal of this type of research is to build a big, wide-ranging picture of the problems that need to be addressed, it's the small findings that can have the greatest impact. Rosenfeldt cites one particularly effective video snippet from a woman who had been a customer of a Midas shop that had been using the new service model but had switched back to the old ways after a managerial change. "She said, 'Jack, the new manager, is nothing like the old manager Joe was. Joe used to really follow these procedures. Jack doesn't and now I'm not going back.' And she went on to describe all of the things that were missing and why she wasn't going back. As I watched it I said to myself, 'This is gold!'

"A lot of what you look for is the little tidbits that really drive a certain point home and this was a perfect example. We could use it to say to the shops, 'Here is exactly why you need to do the things we're suggesting because you're going to get a bunch of Mildreds who are not going to come back!' "

Securing the participation, support and buy-in of the International Midas Dealers Association, the influential organization of Midas franchisees, was critical, Rosenfeldt says. "When it came time to develop the new service model, we had franchisees involved in the writing of it, so it wasn't just Midas saying, 'Here is the new service model, go do it!' They were enthusiastic to be involved in this because of what they had seen from the research. They knew how important it was and they wanted to be a part of it."

Sales improvements

While Midas is fighting the same economic headwinds as most businesses these days, Rosenfeldt says that shops that have adopted the new processes have seen marked sales improvements and also increased numbers of repeat customers. In particular in the Northeast – the focus of much of the research and the service improvement efforts – sales and customer counts are up after both had been trending down since 2005.

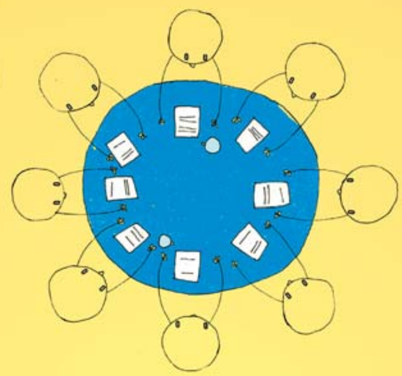
More than anything, the research results have helped focus the company's attention on the value of earning and keeping each customer's business, Rosenfeldt says. "For Midas, this research represents a deliberate and thoughtful process that has led to the ongoing development of an effective, measurable means of understanding what a differentiated customer experience is, how to train to it, how to measure its delivery and how to integrate it into our culture.

"Just as at any large organization, especially one that is largely franchise-based, there are differences of opinion on marketing and other operational issues. But when you have a central theme to rally around, it kind of focuses them on what is important. Do we agree on every single thing? We do not. But we know at the end of the day it's about happy customers coming back. It's as simple as that." | Q

qualitative research

Shaping the discussion

What effect does tabletop shape have on focus group dynamics and client viewing?



By Raúl Pérez

Being constantly on the move from market to market, and from facility to facility, moderators sometimes stumble upon unexpected situations. Though these unexpected situations often alter the smooth progress of projects, a few times they may end up working to a moderator's advantage.

In the summer of 2008 I moderated focus groups in hotel conference rooms in several small markets that had no focus group facilities. Though every booking manager was asked to provide a rectangular table surface, in one of the markets a circular tabletop was set up instead. Believing that the round shape of the tabletop would not be a major hindrance to the research process, I proceeded to hold the sessions, accepting the unfamiliar arrangement.

To my pleasant satisfaction, participants in the groups in which the circular tabletop was used were very engaged in the discussion and exhibited strong empathy toward each other. While being mindful that no single factor is ever fully responsible for the dynamics of a group, I began wondering to what extent the special setup facilitated an especially safe, welcoming environment. To satisfy my curiosity I conducted a literature search in psychology and business journals on the effect of tabletop shape on group dynamics and then asked a group of fellow moderators about their experiences with circular tabletops.

Direct relationship

Psychology studies have shown a direct relationship between physical distance and verbal production – the nearer a respondent is to an interviewer, the greater the number of words in the answers. Therefore, one way in which tabletop shape may affect group dynamics is the proximity factor. Business management studies have found that participant dissent is more likely when individuals sit around rectangular surfaces than when they sit around circular or similarly-rounded ones.

Although the situations examined by psychologists and business management researchers are different from qualitative marketing research interviews in many respects (e.g., rationale for gathering, individual motivators, etc.), basic commonalities (e.g., sitting around a table, the existence of an interviewer or discussion leader, etc.) are sufficient enough to conclude that proximity and table shape effects should play a significant role in focus groups.

Besides the literature review, I

snapshot

After circumstances forced him to conduct focus groups using a circular table, the author began investigating other table configurations to gauge their impact on the qualitative process.

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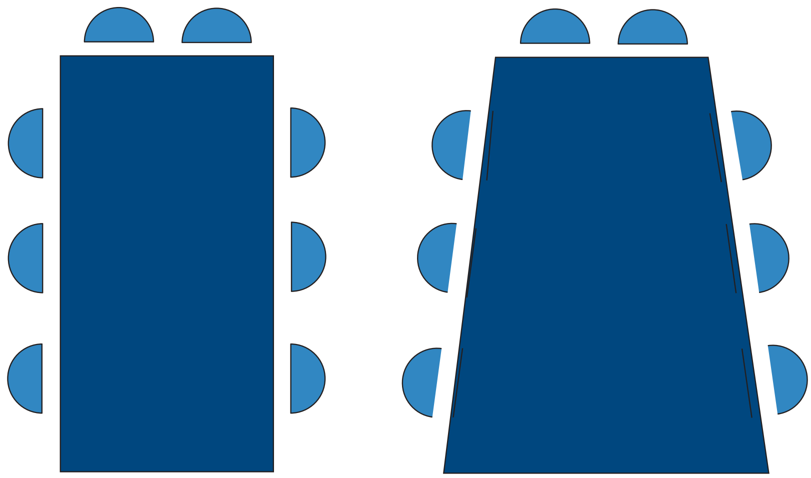
Figure 1: Rectangular Tabletop (left) and Trapezoid Tabletop (right)



asked a group of fellow moderators about their experiences with circular tabletops. To my surprise my colleagues felt compelled to share their experiences with a variety of tabletop configurations, not just circular ones.

Although these moderators did not believe they could offer an opinion on the effect of a particular tabletop shape on group dynamics, they did have a clear understanding of the effect that different setups have on eye contact, which is a factor closely related to interpersonal dynamics. Moreover, my colleagues were quick to note the impact of different tabletops on clients' ability to view respondents. As anyone who has observed a focus group will attest, an unobstructed view of respondents greatly facilitates the following of the sessions.

In this article I provide a description of common and not-so-common tabletop shapes used for focus groups. Rather than presenting an exhaustive review of tabletop options for moderators, this article simply attempts to illustrate how tabletop choice, when available, involves a delicate balancing act among moderator, client and respondent needs.

Primarily, the discussion centers on how these surface arrangements may affect group dynamics by altering distance among respondents, proximity of respondents to the moderator, respondents' ability to make eye contact with each other and the moderator's ability to visually follow respondents. Secondly, the discussion covers how different tabletop shapes affect clients' view of respondents. Six different configurations are reviewed.

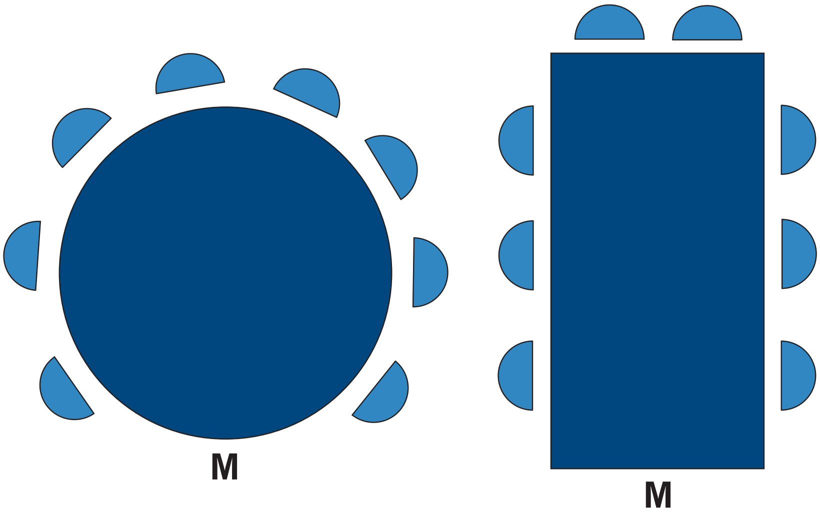
Rectangular tabletops

The rectangular (or rectangle-like) table is the most common setup available in focus group facilities. It allows the moderator to easily establish eye contact with respondents, although those sitting immediately to the left and right normally tend to fall outside of the moderator's visual field. Moderators, therefore, usually make an extra effort to visually monitor the pair of respondents sitting to the immediate right or left.

A welcome advantage of rectangular surfaces is that usually there is plenty of workspace for each respondent. Clients sitting right behind the moderator tend to have a nearly unobstructed view of respondents, while those sitting more toward the side of the room tend to experience some visual obstruction caused by respondents or the moderator. Four of the additional tabletop arrangements shown in this article (trapezoid, semicircle, rotated-rectangle and triangle) help overcome these inconvenient viewing conditions.

From a research management perspective, it is easy to mostly worry about the viewing needs of the moderator and clients at the expense of the viewing needs of respondents. Clearly, moderators need effortless eye contact with respondents to lead the session and monitor focus group progress, and clients need an unobstructed view of respondents to follow the sessions they are observing. However, just as importantly, I believe that respondents need effortless visual access to one another to facilitate their engagement in the session. In this regard, I think rectangular tabletops are less than ideal because respondents usually have to make a considerable effort to see other participants sitting on the same

Figure 2: Circular Tabletop (left) and Rectangular Tabletop (right) of Equivalent Surface Area



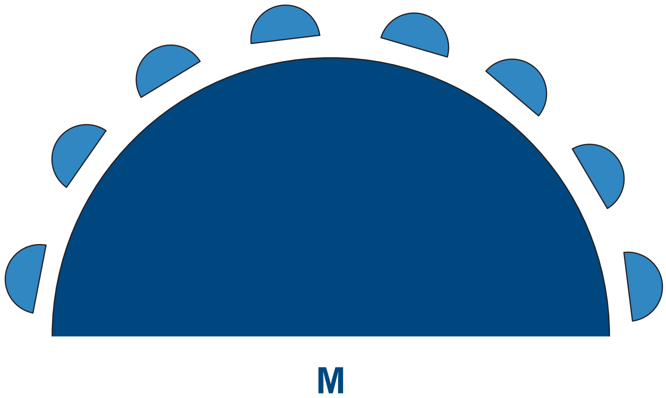
side of the table. The two tabletop configurations with curved edges described in this article (circular and semicircular tabletops) help deal with this limitation.

Trapezoid tabletops

Trapezoid tabletops differ from rectangular ones in that the two shortest sides differ in length. Usually the moderator sits on the longer of the two shortest sides of the table. Therefore, one of the main advantages of trapezoid tabletops is that they help alleviate the sight obstruction experienced by clients when rectangular surfaces are used. An additional benefit is that a moderator's ability to visually follow respondents is somewhat facilitated since the group now appears to open up to a panoramic view. At a very subtle level, the trapezoid shape itself appears to constantly invite clients to engage in the research process. While the trapezoid setup is conducive to better client and moderator viewing of respondents, the adjustment that makes these two benefits possible also leads to two disadvantages: increased interpersonal distance overall and slight impairments to respondents' ability to make eye contact with each other.

As for the first limitation, if we take a typical rectangular tabletop as an example and increase its width on the moderator's side, the average distance between each pair of respondents, and between each respondent and the moderator, is increased (see Figure 1). If we were to extrapolate the findings of social psychology studies on interpersonal distance and verbal production to the focus group situation, we might suspect that these increased distances would be a factor limiting the number of words produced by respondents. While

Figure 3: Semicircular Tabletop



number of words per se is not a measure of the quality of group dynamics, it is true that transcripts from very engaged groups yield relatively lengthy participation bits by respondents.

To appreciate the second limitation, let us consider that if most respondents sit along the longer sides of the trapezoid tabletop, then most of them would be facing other respondents in an oblique angle, not straight on as they would in a rectangular setup. This atypical angle, in my opinion, makes it slightly more difficult for respondents to visually engage with each other during the course of the conversation. Also, compared to rectangular tables, the trapezoid arrangement seems to direct respondents' attention toward the moderator and away from fellow respondents. In other words, in this setup the focus of attention moves toward the moderator and away from respondents.

However plausible, these two slight difficulties should not necessarily affect group dynamics, verbal production or group engagement. For example, focus group interventions (e.g., picture sorts, brand sorts) that throw the focus of attention toward the middle of the table (and away from the moderator) could help address the two types of limitations of trapezoid tabletops just mentioned.

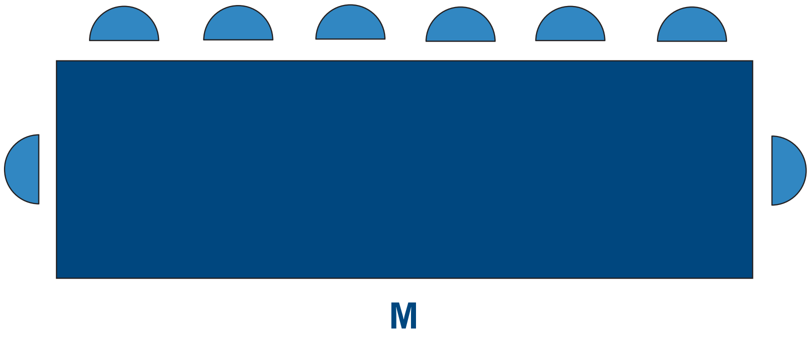
Circular tabletops

Whereas there tends to be more interpersonal space when moderators use a trapezoid table relative to a rectangular shape from which it was derived, there is no more interpersonal distance when moderators employ a circular table of a surface area equivalent to a typical rectangular table (see Figure 2). Furthermore, the average distance between the moderator and respondents is about 17 percent shorter in a circular table than it would be in a rectangular table of equivalent surface area, assuming the sitting arrangement in Figure 2. In terms of respondents' ability to visually follow each other, respondents are less likely to obstruct the view of those sitting around the table, which is a main limitation of the rectangular setup. Finally, I would argue that a circular setup is a symbolic statement in itself, something that prompts respondents to state to themselves, "We are here in this (group) together," a desirable idea if we want participants to sense a supporting, safe environment in which to share personal experiences.

Despite their favorable aspects, circular tabletops present important challenges to moderators and clients. If in rectangular setups moderators find it hard to make eye contact with respondents sitting immediately to the left and the right, this issue is dramatically exacerbated when using circular arrangements. A colleague sharing her experience with a circular setup not only found it hard to make eye contact with respondents immediately to the right or left, but also found it difficult to monitor other respondents when paying attention to those immediately to the side.

Needless to say, with circular tables clients are guaranteed an obstructed view of about half of respondents. To some extent, even respondents themselves may be inconvenienced by the circular setup. Some of them would need to significantly alter their sitting position to direct attention to a particular point in the room, for

Figure 4: Rotated Rectangular Setup



example, a video monitor placed on the wall facing the moderator. In terms of accessible tabletop workspace, there is definitely less of it for each respondent, something which would make exercises requiring multiple materials very difficult.

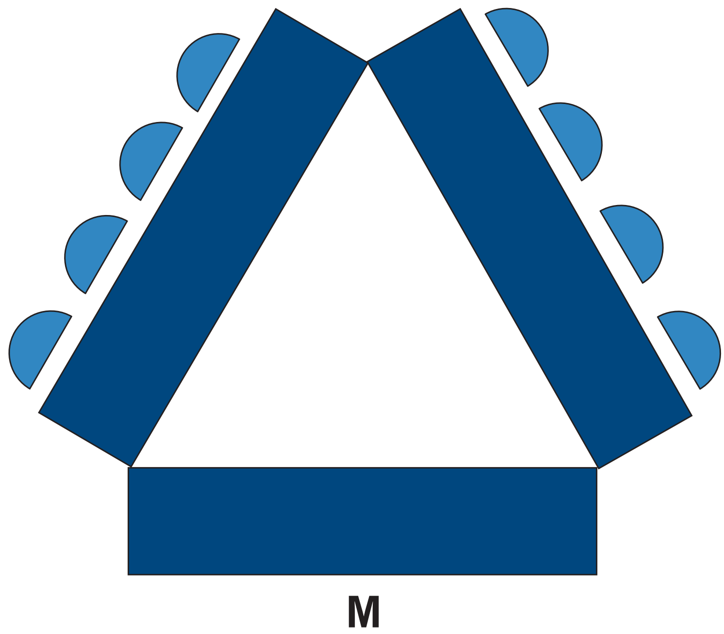
These disadvantages clearly point toward limiting the use of circular tables to instances in which all of the following conditions apply at the same time: clients are absent; respondent workspace is of minimum importance; and high group cohesion is particularly desirable for the topic at hand. Under these circumstances, circular tables may result in a refreshing experience for the moderator and could facilitate disclosure when dealing with sensitive topics. The literature evaluating the effects of circular and semi-circular tables on business meetings is somewhat consistent with this conclusion: compared to rectangular setups, more-rounded arrangements facilitate a sense of inclusiveness and result in more level relationships among participants.

Semicircular tabletops

In a semicircular table arrangement, a moderator sits at the point corresponding to the center of the circle inscribing the tabletop and respondents sit along the rounded edge. The mirror, as usual, is behind the moderator (Figure 3). Of all arrangements considered in this article, this setup is likely to be the best for client viewing, given the low likelihood that a respondent might block the view of another.

For the moderator, there are two important advantages. One of them, shared by one of my colleagues, is that the potential nuisance of having respondents peek at the discussion guide and other materials is eliminated due to the moderator not having anyone sitting to the immediate right or left. The other advantage is that in this setup the moderator sits relatively equidistant to each respondent, which helps provide a sense

Figure 5: Triangular Setup



of equilibrium to the interactions moderators have with each respondent. This setup, unlike the circular one, gives participants plenty of surface space to work independently with printed materials.

It would be very tempting to assume that semicircular tabletops, given their relation to fully circular shapes, would keep many of the proximity, eye-contact and inclusiveness aspects of circular surfaces. However, upon detailed examination, this table shape has some obvious disadvantages for group dynamics.

First, if circular arrangements facilitate a sense of inclusion and protection that may encourage personal sharing, semicircular tabletops appear to do just the opposite, given that respondents in this latter type of setup are overtly exposed to an unknown audience. Second, when employing semicircular tabletops the average distance between respondents is greater than when using rectangular, trapezoidal or circular tabletops of equivalent surface area, something that would limit interaction. Third, although the view of other respondents is not obstructed by fellow participants, it would appear that the prominent placement of the moderator would magnetize visual attention toward this person, a fact that may affect the quality and quantity of group interaction. It follows that semicircular setups would work best for highly structured situations in which moderator control of the session is paramount; for example, when dealing with highly opinionated experts.

Rotated rectangular setups

The rotated rectangular setup virtually replicates the sitting arrangement of the semicircular setup. As shown in Figure 4, the moderator sits alone in the middle of one of the long sides, with his or her back toward the mirror, and respondents surround the table along the three other sides. While sharing the same strengths and shortcomings of the semicircular setup, there is an additional limitation related to its rectangular shape: Given the likelihood that most respondents would sit along the remaining long side, visual interaction among this subset of respondents would be somewhat limited.

Triangular setups

This rather unusual setup is very useful when conducting focus groups in flexible conference spaces such as those found in hotel meeting rooms. As described by one of my colleagues, three long, narrow tables, one of which is exclusively used by the moderator, are arranged in triangle form (Figure 5). With a camera placed behind and above the moderator, clients located in an adjacent viewing room should be able to have an adequate view of respondents. While smartly solving the problem of how to place a video camera in a hotel room, just as in the semicircular, rotated-rectangular and trapezoidal setups, in the triangular arrangement respondents' vision is partially projected toward the moderator. However, in my opinion, this setup is a very intelligent compromise between the need to provide client viewing and the need to enable respondent interaction.

Important implications

My goal in this article has been to assist fellow moderators and users of qualitative research in their current appreciation and future use of different focus group table arrangements. If interpersonal proximity, ability to make eye contact and ease of client viewing are factors impinging on the research process, it follows that tabletop shape has important implications for focus groups. Based on what is already known in the scientific and business literatures, and our own experiences as moderators, it is within our reach to continue developing an informed understanding of the procedural impact of different focus group tabletop arrangements on our work.

In a figurative world in which clients and moderators were to be granted the same level of respondent viewing regardless of table shape, the decision on what type of table to use would clearly depend primarily on the type of dynamics we want to facilitate among respondents. No single tabletop configuration is better than another - in the real world that judgment would depend on what we are striving to achieve with our respondents and how well the setup exposes participants to clients and the moderator. Still, it should always be helpful for a moderator to consider the effect of the research environment on the respondent experience. | Q

ethnographic research

Of stovetops and laptops

Ethnography tracks the migration of technology into the American kitchen

By Maren Elwood

Each year since 2004, to produce our Cyber Census - a syndicated cross-country ethnographic research study - members of our firm have boarded an RV and driven from coast to coast, covering 15 to 20 states each trip, to track a core group of 150 Americans and their use of and interaction with Web-based and other technology.

The interviews are designed to allow the researchers to embed themselves in the consumer's real life, from a few hours to days spent living with the study participants. We also conduct a full exploration of the consumer's online life via a surf-along, which lets us experience their cyber lives.

Our research shows that people are increasingly looking for a space in the home, most often the kitchen or family room, where they can interact with people and media in both physical and cyberspace. They want a highly interactive room that lets them socialize in physical space while using their handheld devices and computers to access their virtual environments.

This trend has manifested itself in number of ways: in some homes, dining rooms are rarely used for dining; computers are migrating out of the home office; and technology of all types has moved to the family kitchen.

Our observations led us to the acronym HIVE (highly interactive + virtual environment) and the associated term hiving, which is our way of characterizing this trend.

Our choice of HIVE to describe this consumer behavior was bolstered when we started researching beehives and found that bees behave in a similar fashion. Bees have various ways of communicating but they ultimately return to their hive to work together to produce honey - a task they could not do alone. Like bees, people come back to their HIVEs and want to share the efforts of their day with others both physically and virtually. This desire has prompted many consumers to move their tech into the family space.

snapshot

For many Americans, a kitchen is no longer just a place for making meals. The author's ongoing study has seen it morph into a HIVE, a highly interactive virtual environment that incorporates food preparation along with checking e-mail, surfing the Web and a host of other tech-related activities.

Don't want to be isolated

People report hiving for many reasons, but the most common reason is that they don't want to be isolated from others. The home office/den filled with technology may give you the ability to communicate with others online, but it does little to

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connect you with the actual people in the home. Consumers report "catching grief" from spouses because they spend too much time on the computer away from the family, especially during dinner time. Parents are concerned about monitoring their children while they use the computer for homework or other activities. And, parents of older children really worry about all the time their teens spend alone on the computer and handheld devices.

Another factor driving hiving is Americans' addiction to multitasking. When we started the Cyber Census in 2004, tech-based multitasking seemed like a 20-something behavior. Over the last few years our research shows that multitasking has become an American way of life, something practiced by all age groups.

For people who multitask using technology, increased productivity is often the primary benefit. While multitasking outside the home can be dangerous (distracted driving, etc.) multitasking in the HIVE is what the HIVE is all about. In a well-equipped HIVE, you can make dinner, talk on your phone via Bluetooth, help your kids on the computer do their homework, charge your handheld devices, download and sync your media, check your e-mail, watch television, check your stocks, pay bills and still feel that you are a part of the social activity in the home. The laptop has become as common as the toaster oven in the kitchen. And electric cords and chargers clutter countertops, making a different kind of spaghetti.

Integrated solutions

While we have been documenting the need for intelligent kitchen and family-room design for our Cyber Census sponsors for years, very few companies have taken the time to develop integrated solutions for the HIVE. At this year's Consumer Electronics Show, several companies touted their "home of the future" initiatives and talked about the need for devices to get smaller (or in some cases, bigger), faster, prettier and deliver content on screens that jump out and grab your already overworked eyes in 3-D. There was talk about making tech easier for the busy mom, designing cars so that driving while on the phone is impossible, providing even more applications for handheld devices, and the ever-popular screen-on-the-refrigerator idea. But, was there a toaster oven with a plug for my phone charger? No. Was there a microwave with a screen so a busy mom can watch her favorite show while making dinner? No.

"MacGyvering"

There have been efforts through the years to come close to the home of the future, the kind so beautifully animated in the 1960s *Jetsons* television show. But the reality for the American consumer is closer to the adept jerry-rigging of TV's MacGyver. Consumers are "MacGyvering" their own solutions to create effective HIVEs. They drag desktops, laptops and tech of all types into the kitchen and try to figure out where to put all these devices in a space designed for cooking, not teching. (The MacGyvering that goes on in vehicles to link music devices is another example of this behavior, but that's a whole other article.) As a result, the power strip has become a kitchen standard and consumers move furniture about in an effort to redesign what could have been designed well to begin with. Consumers are looking for practicality and informed industrial design that blends physical reality with technological developments to create solutions that work in their real lives.

Briceson, a flooring contractor in San Antonio, is good example of a father struggling to keep up with his workload while socializing with the family in the evenings. "I get grief when I sit in the office and work on my computer. I bring my laptop out to the kitchen so I can be with my family while catching up on e-mails." Briceson wishes the kitchen area of his home was equipped with a media center on the wall so he wouldn't have to utilize multiple devices to watch television, go online and monitor his children's online gaming activity.

Randy, a civil engineer and a Cyber Census panel member since 2006, is a good example of someone who's addicted to multitasking. When we first met him he had just purchased a new condo and had set up a full home office. In 2007 he purchased a software package to try and link his big screen in the living room to his computer with a wireless keyboard and mouse. He was dissatisfied with that MacGyvered solution, so in 2008 he had moved most of his computers into the living-room area. "I want to be able to watch my shows, check my stocks and do work on my computer. So I have had to move my computers into the area where my media center is, and that's the bar area."

In 2009 we found that he'd moved all of his technology into the dining room area, which was convenient but a bit overwhelming for the space. Ultimately he's trying to find a configuration for his various screens that works for his lifestyle. Over the last few years he just hasn't managed to get it right despite his best efforts. Randy is getting married in 2010 and we look forward to seeing what changes he'll make as he moves into married tech life.

Emerging technologies

As we approach the formal launch of the Cyber Census 2010 this month, one big question in the consumer electronics world is, will consumers adopt the new 3-D screen television technology? We will be revising this question to ask consumers about the role of 3-D screen technology in the American HIVE. We will also turn our ethnographic lens on other emerging technologies such as the iPad, continue to explore music culture, document mobile device use and needs, and embed ourselves on social and new-media platforms to interact with our study panel there as well. Ultimately, research in both physical and cyberspaces is critical to understanding consumer habitats, trends and how technology can become a more effective partner in our American culture. | Q concept research

The arrows are flying

Does your concept have what it takes to hit its target?

By George Ciardi

The objective of a concept test is to propose a solution to a perceived unmet need (big or small), measure the consumer's interest and optimize the proposition. But how do you present new product ideas in a manner that allows consumers to provide the proper evaluation and feedback during their review of a concept?

Many organizations face this challenge in the innovation development process. Through testing and evaluating thousands of ideas across hundreds of categories over the years, we have gathered key learnings about the development of a good, testable concept - and we're conscious of the odds against introducing a successful product.

A majority of the resources allocated to new-product development projects are spent on efforts that never reach commercial success. Why? The most common reasons for new-product failure include a general lack of market understanding, product defects, inadequate marketing push and competitive reactions. And, frankly, many "new" ideas simply aren't that new and different. Part of the problem stems from a frequently-employed ad hoc process that starts with a directive to "Innovate!" and results in random, one-off ideas.

Before rushing headlong into concept writing, it's important to pause to consider whether you're truly ready. Before writing begins, it's important to:

- insure that the organization is aligned on the strategic goals for the project;
- conduct foundational research with consumers to define the opportunity;
- fully explore the territory through ideation to uncover truly unique ideas;
- consider the launch window and related parameters up front.

When these issues are adequately addressed, then you know it's time to start writing.

Optimize the proposition

When presenting concepts to consumers, clear understanding of the concept is needed to better optimize the proposition. Think of the elements about which we expect them to provide feedback. The most common measure for

snapshot

Innovation may seem like a daunting undertaking, with few signposts to guide the trailblazers of new ideas. However, there is a roadmap that can assist innovators along an effective concept development path and improve the odds of success.

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evaluation at each stage is purchase interest, or consumer choice, which captures consumer persuasion. (Predefined thresholds, often referred to as the hurdles in a Stage-Gate process, are a key part of the development process.)

In addition, there are a number of other important measures and questions to consider. What is the underlying strength of the idea? Does it fill a need identified through a fact-based strategic plan? Is it relevant? Is it appealing? Is it believable? Does it fit with brand or corporate positioning?

Linked directly to the foundational research itself, there are clear and identifiable concept components that to be included, listed in order of importance:

1. Identify the insight/unmet need being addressed by the new product.
2. Clearly communicate the consumer benefit.
3. Convey the reason to believe (the value proposition).
4. Provide relevant information (headline, brand, picture, price, sizes, channels).

Insight or unmet need

Need states can be occasion-based, emerging, functional, emotional or some combination of the above; an idea that doesn't fill an unmet need will score as such – and even a good idea will score lower if the unmet need is not clearly communicated through the concept.

Many industry leaders feel that unmet needs are not always apparent to consumers. Therefore, it is crucial to state the unmet need. (Don't provide a solution, just set the stage.) Failure to state the need may lead to poor scores if it isn't obvious to all consumers what need the concept fulfills.

Consumer benefit

The expression of the benefit brings the insight to life for consumers because it proposes a solution. (This statement should be a single sentence or two at most.) For example, let's consider Fridge Packs, which entered the market a number of years ago. Through ethnography insights it was revealed that messy and cluttered refrigerators made it difficult to find your favorite can of soda. The benefit statement for this concept should demonstrate findability and convenience. "The new Fridge Pack is a convenient storage system that is placed directly in your refrigerator, making your favorite soda easy to find."

Reason to believe

The objective is persuasion to act. Key motivation triggers are brought to life through emotional references, functional aspects, example uses, occasion references.

Some questions that can help define/refine reasons to believe include:

- How does it work or deliver against the benefit?
- What are the connections between need, benefit and reason to believe?
- What are the most persuasive triggers (functional, emotional or a combination)?

A highly-recommended concept design includes the same or similar words from both the unmet need statement and the benefit statement. A clear connection can really make a concept pop and should be part of the communication strategy. It is also recommended that brand equity be utilized – "brought to you by…", "from the makers of…", or a simple reference to the parent brand name.

Keep the promise real. Do not oversell a concept. It may score higher on purchase interest, but could suffer from low believability. If increased consumer expectations set the bar higher than the product can perform, it will become another in-market failure. Even if initial trial is high, after-use (repeat) measurements will be weak and sales will fall.

Relevant information

When it comes to writing copy, keep in mind that using too many words may create confusion and disinterest, while using too few may not tell the full story. The key is to concisely demonstrate how the new offering will satisfy the unmet needs in a meaningful way.

A concept outline that works well for most research includes:

- a short, pointed headline;
- a statement of the unmet need to consumers;
- a brief explanation of how the need in fulfilled (reason to believe);
- copy - functional/rational and emotional drivers intended to persuade (purchase product, call a toll-free number, visit a financial advisor, go to a showroom, visit a Web site, etc.);
- an illustration of the product; and
- a callout of available features (sizes, options, price, location of product, etc.).

Copy length should closely mirror how a consumer will become aware of the new offering once it is available in market. If awareness will source primarily from the shelf, with no advertising or mass-marketing support, then use a package shot without a positioning statement. In these scenarios, the package will be the message piece and the picture of the package is recommended as the stimulus. On the other hand, if consumers will likely become aware through more traditional mass-communication channels, then the copy should mirror how it will be conveyed through in-market messages.

The copy (proposition statement) includes the call to action and should be placed in close proximity to the illustration. These elements are very closely linked and often convey similar information that resonates with consumers.

Helps define

A fully-executed concept should include sizes, prices, branding and distribution information. This tactical information, which many consider optional, complements but also helps define a concept.

Branding
It is a fact that branding is part of the communication. For example, a new spicy chicken fillet sandwich invokes a different set of perceptions and expectations among consumers depending on if it's being offered by Burger King, McDonald's or KFC.

In recent years, co-branding has gained in popularity. When testing co-branded concepts, the importance of branding is unquestioned because it is one of the fundamental reasons for the new offering.

Price
At the later stages of concept development, pricing is a crucial element of a product's positioning and is just as important as branding or other product attributes. Price makes a statement about the offer. A premium-priced product carries a very different set of expectations than a parity-priced product. In some cases, price itself is the unmet need. Store brands emerged in the 1970s entirely on this premise.

An un-priced offer means different things to different people. In side-by-side research, purchase interest scores were volatile when the concept was presented to consumers both priced and unpriced. The direction of the bias went in both directions, seemingly without reason.

Illustrations
The old adage that a picture is worth a thousand words is certainly true when it comes to concept design. Shelf pop is crucial and the lack of it can kill the best ideas. In addition, quality is important. Graphical errors, low-quality pictures or too many pictures can distract from the key selling points and benefits.

From a testing perspective, there may be little measurable difference between black-and-white and color graphics. (Research has shown that concepts tested under a still shot, in color, score nearly the same [+2 percent] when tested in black-and-white, and similarly if they are tested in video format.) However, a color graphic may have a significant impact in testing concepts where color plays a key role in accurately conveying the concept benefits. For example, a new blueberry cereal requires a color graphic to provide the most appealing visual of milk, corn flakes and blueberries and to convey the quality and health benefits.

One step closer
Good concept design provides the basis for more refined concept testing, taking strategic ideas one step closer on the path to successful launch. Overall, a concept must clearly communicate in a manner the consumers will understand, and include the essential elements that will persuade them to buy the offering. Concept organization and presentation should be appropriate to the idea, the elements in harmony with each other. If there is a struggle to provide the insights in the presence of the idea, it may be an indication that more development is needed. | Q

the business of research

The ROI on calculating research's ROI

Determining the return on research can be tricky but is worthwhile

By Brett Hagins

In partnership with *Quirk's*, Research Innovation and ROI Inc. conducted a study called the Four Rs of Research: Revenue, Risk, Results and Return. It involved an online survey, 75 in-depth telephone interviews with corporate research executives and a literature synthesis that included adapting best practices from other functional areas, such as sales, to the corporate research function.

The broader study had three aims: maximizing the business impact of research; reducing unnecessary costs; and more explicitly quantifying the economic value of research. (Information about the full scope of the study is available at www.researchinnovationandroi.com.)

Most organizations do not quantify the economic value of research explicitly – mainly because it's hard to do! But our hypothesis is that the failure to demonstrate the economic value of research has led to the commoditization of the research function in many departments where the dominant focus is on cost savings.

The benefits of quantifying the economic value of research include:

- increased credibility with senior management and other functional areas;
- increased focus on the factors in the processes that drive the most economic value;
- a greater probability that research will be viewed as an investment rather than an expense;
- more ammunition in defending the research budget;
- better prioritization and allocation of research resources;
- more incentive for the research department to stay involved through execution.

snapshot

Continuing his article series on demonstrating the value of research, Brett Hagins draws from a larger study of *Quirk's* readers and in-depth interviews with client-side researchers to explore the merits and methods of quantifying the economic value of research.

Through our study, we have developed 11 methods that may be used as a proxy for calculating return on investment from research. All of the methods have the following things in common:

They **make an explicit connection to one or more business impacts.** While understanding awareness, image, etc., is a valuable research objective, these things are not quantifiable business impacts. Quantifiable

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business impacts include but are not limited to such things as increased customer retention, decreased marketing costs, decreased cost of goods sold through the elimination of unnecessary features or benefits, decreased customer support calls, decreased customer acquisition cost, increased share of wallet. We would even define risk mitigation as a business impact when it is quantified financially. Intermediate benefits in learning and knowledge, which fall short of a business impact, must eventually have a business impact to calculate an ROI - although in some cases, it takes years of research to turn the boat around.

We favor a more conservative approach which only calculates the ROI associated with research that has an immediate business impact. For intermediate gains that fall short of this (diagnostic research resulting in key learning but no direct association with a business impact per se) there must be additional research and or a marketing investment at a later time to capture the benefit of that intermediate learning. We would argue than that the cost of the intermediate learning should then be allocated at the time that the business benefit is realized.

They can **demonstrate that something happened** as a result of the research that would not have happened otherwise and quantify the financial value of that difference OR **demonstrate that risk was mitigated** and quantify the financial value of the risk reduction.

They **test several working hypotheses** as to how the business impacts could be achieved in advance of the research, and build in mechanisms to test those hypotheses.

Thinking about the business benefits above, one of our beliefs as to why research is commoditized in some organizations is that there is too much emphasis on passive diagnostic measurement over prescriptive recommendations. Diagnostic measurement may be an initial first step. However, it frequently does not go far enough to drive the real impact. In theory, a rigorous emphasis on diagnosis leads to using that learning to drive improvements, but in practice it often serves as a rubber stamp to validate success or is methodologically dismissed if it does not validate that success. Therefore, it is critical to have the working hypotheses at hand.

In addition, you must have appropriate discussions with stakeholders to set action standards. If, on the other hand, diagnostic research truly leads to a decision to halt unprofitable marketing investments, then you can demonstrate a return on investment.

They **make the projection of ROI as conservative as possible** to maintain credibility. In order to do this, we recommend moving beyond differences in revenue and actually deducting the cost of goods sold, marketing investments and other incremental costs.

Note: Researchers are their own worst critics. The assumption many researchers make is that if these methods are not perfect, not 100-percent bulletproof, it is not worth making the attempt. We found during the course of the depth interviews exactly the opposite: The organizations that made the attempt were given respect even though the methodology was not perfect because they made the effort - they documented all of the assumptions, caveats and vulnerabilities of the method up front and were conservative in their calculations.

We would argue that getting as close as possible to demonstrating return on investment - even if it is not perfect - is critical in elevating the status of the research function.

Defining return on investment

Before exploring one of the methods, we should review how we are defining return on investment and other concepts.

ROI, as we are defining it, involves:

1. Determining the net margin that can be attributed to research.
2. Subtracting the cost of research

$$\frac{\text{Net Margin Attributable to Research} - (\text{Incremental Marketing and Operations Investment} + \text{Research Investment})}{(\text{Research Investment} + \text{Incremental Marketing and Operations Investment})}$$

bundled with any incremental marketing or operational investment associated with following research recommendations.

3. Dividing the result by the total (Research Investment + Incremental Marketing and Operations Investment).

Net margin attributable to research: Incremental revenue associated with research minus the cost of goods or services minus other costs (including marketing and administrative expenses).

Net present value: If a research ROI measure is to capture the full impact of the research investment (over a number of years) then it will have to include profits and costs from subsequent years as well as the initial year. Future cash flow is not as valuable or reliable as more immediate cash flow and so these projections must be discounted to account for this. Calculating the net present value of the research in the initial year and as well as the net present value of cost of goods sold would be one way to estimate the residual economic impact of research beyond the base period. We include an illustration of an ROI method later in this article that only looks at return for Year 1 for simplicity purposes.

Incremental marketing or operations investment: This would include any new marketing or operations investment incurred as a result of following research recommendations. It would not include the base marketing investment made anyway.

A conservative definition of ROI must account for not only incremental revenue differences resulting from following research recommendations (or risk mitigation) but deduct costs and account for incremental cost differences attributable to following research recommendations.

Of course, if cost reductions or savings are driven by the research, then these deductions are not necessary (except for any initial implementation cost necessary to realize the cost difference) and there is a more direct impact than in the case of incremental revenue differences.

An illustration: revenue maximization

In any kind of quantitative test where multiple items are tested among consumers (these can include different executions of ads, different price points, product concepts, package designs, names, etc.) it is possible to forecast the incremental revenue associated with the selection of one item over another provided that key metrics such as purchase intent, frequency, etc., are captured.

This method necessitates that

Name of method: Revenue gain

Short description: Quantify the net financial impact of what is chosen as a result of the research versus what would have been chosen in the absence of research

Inputs	Concept 1*	Concept 2	Concept 3**
Market Size/Campaign Size, etc.	1,000,000	1,000,000	1,000,000
Composite Concept Score	5%	3%	10%
Distribution	50%	50%	50%
Awareness	20%	20%	20%
Purchase Price	$95	$95	$95
Total Projected Trial (Units)	5,000	3,000	10,000
Total Projected Trial Volume (Dollars)	$475,000	$285,000	$950,000
Repeat Usage	66%	66%	66%
Monthly Purchase Frequency	2	2	2
Total Projected Volume (Units - Year 1)	79,200	47,520	158,400
Total Projected Volume (Dollars - Year 1)	$7,524,000	$4,514,400	$15,048,000
Revenue Difference: Concept Chosen with Research vs. Concept Chosen Without Research	$7,524,000		
Cost of Goods Sold	$3,009,600		
Marketing Investment	$3,000,000		
Research Investment	$100,000		
Other Investments	$1,000,000		
Total Costs	$7,109,600		
Net Margin Attributable to Research	$414,400		
Projected Research ROI	314%		

Notes:
Methodologies for which this approach may be applicable (any quantitative testing of different alternatives): concept testing, pricing research, advertising research, naming research/packaging, etc.

Assumptions/Definitions
1. Item can refer to anything tested - concept, price, etc.
2. Must understand which concept, price, ad, etc., would be chosen in the absence of research.
3. Assumes that item chosen as a result of research is implemented (often substantial disconnect).
4. If research does not choose a different concept than what was originally predicted (validates initial inclinations were correct) then use the risk mitigation method.
5. "Composite Concept Score," as listed above, refers to how the quantitative measurement is derived to project purchase intent. Could be as simple as a top-two box score for purchase intent factored for appropriate industry norms (70% of the definites, 25% of the probables, etc.).
6. Assumes that investments are the same in this case regardless of which concept is implemented.
7. This could also be used to show the net cost savings if a concept with negative ROI is halted due to research.

*Concept chosen in the absence of research
**Concept chosen as a result of research

research establish which concept, ad, price point, name or package design would most likely be chosen in the absence of research. We recommend that this question be included as part of the research screening process during the initial stakeholder meetings with your internal clients. At that early stage, stakeholders may not have given the matter sufficient thought to identify this, so it may be necessary to revisit which item would be chosen after the research has been designed but prior to it being executed.

Another approach that could be used if the research has already been completed and this information is not available is to take the average of all concepts, ads, names and prices tested and compare the difference between the average and the actual item chosen as a result of the research.

Keep in mind that the incremental revenue gained from the selection of one concept over another, one price point over another (name, package design, advertisement) is a starting point for ROI, not the destination. We must factor in cost of goods sold, marketing investment, differences in design or execution costs of the concept selected over the other if they are not equal. After all these expenses have been deducted, what is left could justifiably be construed as the incremental revenue attributable to the research itself.

In the course of the depth interviews conducted for our study, several who used this method indicated that the organization did not execute as planned and therefore the potential ROI was not realized. Therefore, the projected ROI calculated on the front end of a project must be factored down retroactively if the marketing investment is scaled back. The front-end calculation represents the maximum potential ROI resulting from the research and would favor not doing the research if the ROI is questionable, given all of the subsequent actions that have to occur to fully realize that ROI.

It would be easy enough to adapt this to advertising research where one was calibrating differences in purchase intent based on an advertising concept test or differences in awareness. You could also apply the same principles to a media selection calculator illustrating how efficiently different types of investments reach the target audience relative to the dollars spent.

If management does not choose a different concept than what was originally predicted (which validates that initial inclinations were correct) then it may be more appropriate to use a risk-mitigation method. In the chart, "Composite Concept Score" refers to however a quantitative measurement is derived to project trial: It could be as simple as a top two-box score for purchase intent factored for appropriate industry norms or it could be composite percentage calculated from a variety of metrics including purchase intent, uniqueness, believability, etc. This also assumes (in this case) that investments are the same regardless of which concept is implemented - although these assumptions can be easily changed. This same method could also be used to show net cost savings if a concept with negative ROI is halted due to research.

We also recognize that the above method oversimplifies the contribution of research in that it focuses purely on the incremental value driven from the selection of one concept over another and does not include (for example) qualitative research to improve the concepts themselves prior to quantitative testing.

Based on our studies, some other methods of calculating the ROI of research include:

Risk mitigation: Applicable if research does not drive a different decision but substantially reduces the risk associated with a decision.

Cost reduction: Applicable if research drives cost savings resulting from the elimination of an unnecessary feature or service element.

Cost savings (internal vs. outsourced research): Illustrate savings associated with doing research in-house versus outsourcing.

Customer retention: Quantify the revenue associated with saving high-risk customers or high-risk customer segments through intervention or process improvement.

Campaign analysis: Quantify the economic value of research used to drive the selection of one direct-mail piece over another, one e-mail over another, etc.

Opportunity and risk quantification: Quantify the value of economic value of identifying opportunities or threats in the marketplace (as for example through a tracking study or segmentation research).

Sales promotion: When research is used to support sales efforts, quantify the economic value of the inclusion of research in sales presentations or white papers as a precursor to sales calls.

Time savings (syndicated research): Quantify the financial value of time saved using pre-purchased research versus doing primary research or having executives gather needed information from scratch.

Usability impacts (Web): Quantify the economic value of usability testing for Web sites.

Research portfolio: A method for calculating ROI for the research department as a whole.

Develop additional methods

As our base of contributors expands, we will develop additional methods, including consideration for qualitative or exploratory research. Qualitative researchers especially may reject the notion of ROI. We would argue that while less exact, it is possible for departments to demonstrate the economic value of focus groups. If, for example, a focus group reveals that messaging in a particular country is mediocre or unappealing, it is reasonable to assume and illustrate that some portion of the sales in that country would not have occurred in the absence of modifying that messaging.

As long as the projections are conservative, we believe that senior management will appreciate the effort to quantify the value of research. This requires a willingness to accept the notion that an imperfect method (with heavy caveats) based on a series of assumptions is better than doing nothing. There is intrinsic value in reminding executives that a set of $30,000 focus groups uncovered a key messaging problem, the resolution to which increased sales in a market by 10% (or roughly $600,000).

While it may require some negotiation with internal stakeholders to reach a consensus on the relative contribution of research, we believe that the researcher who understands, quantifies and communicates the value of research within their organization is more likely to preserve and expand their budget than the researcher who does nothing because he or she cannot attribute an exact percentage.

Please contact us if you have a method you would like to share with others and we will share value with you in return. We welcome feedback from other suppliers in addition to corporate research executives and will give contributing suppliers credit for their ideas. | Q

continued from p. 10

and, in the case of Millennials, very likely to bring another adult along on most outings. For more information visit http://blog.nielsen.com/nielsenwire.

Consumers not averse to switching up snack and beverage choices

When budgets are tight, most might assume that consumers would be more reluctant than ever to take a chance on a new product. While that may be the case for some consumers and some products types, a survey conducted by Louisville, Colo., research company Market Force Information indicates that consumers are as willing as ever to sample new food and beverage items.

So what are consumers venturing to try? Specialty coffee and teas enticed more consumers to try a new brand or flavor. While 82 percent of respondents said they drink coffee or tea and cited traditional brands such as Folgers, Sanka, Lipton and Nestea as the brands they currently have at home, 52 percent said that they had tried a new brand or flavor of coffee or tea from a grocer in the past 30 days. Their purchases ranged across a variety of brands, with 15 brands receiving 10 or more mentions. Starbucks coffee garnered the highest response in the coffee/tea category with 81 mentions. Dunkin' Donuts coffee received 43 mentions, followed by Celestial Seasonings and Folgers, with 35 and 34, respectively.

In the beverage category, Coke's vitaminwater was the most commonly mentioned new beverage purchase, followed by V8 and SoBe. Of the top 17 brands that dominated in the beverage category with 10+ mentions, Pepsi accounted for five of them (Pepsi, Dr. Pepper, Mountain Dew, Sierra Mist and Gatorade). Starbucks also made it onto the beverage list. Fuze had a strong showing as a relatively new entrant, mentioned almost as frequently as much better-known brands such as Pepsi and Mountain Dew.

Crackers, popcorn, chips and pretzels are consumer favorites, as seven in 10 respondents said they have those at home. And it appears that consumers are very open to trying other sorts of snacks. Forty-four percent of consumers reported trying a new brand of snack in the last 30 days. And while just 17 percent of consumers said they typically have snack mixes at home, the leading brand of snack consumers remember trying in the past 30 days was Chex Mix. Chex Mix and Ritz virtually tied for number of new product trials in the snack category, with one-third more mentions than the No. 3 snack Fiber One. That said, consumers could recall buying these brands, but they typically could not recall the new flavor they tried. This fuzzy memory effect could be due to an overload of flavor varieties. Chex Mix, for example, has 13 different flavor varieties ranging from salty to sweet.

Kashi and Kellogg's Special K cereals were the two brands mentioned most frequently as new cereal products tried. In fact, they had more mentions than any brand across the six categories researched, with 127 and 123, respectively. General Mills' Cheerios brand rounded out the top three with 80 mentions. The nearest competitor was Post's Honey Bunches of Oats with 24 mentions. The same branding recall issues were evident in the cereal category, where some consumers could remember the brand but not the specific flavor.

Consumers were slightly less likely to try a new cleaning product than snacks, coffee or beverages, with 29 percent of consumers reporting that they bought a new brand in the past 30 days. When they did try a new cleaning product, long-standing brands won out: Lysol was mentioned most frequently, followed closely by Swiffer and Clorox, with 29, 28 and 27 mentions, respectively.

It is probably no surprise to any veteran marketer that, when consumers were asked what made them pick up and buy a new product in various consumer packaged goods categories, four in 10 said they saw it on the shelf or display. Promotions such as coupons were mentioned as driving factors by three in 10 respondents, and referrals by friends was the next most popular reason driving new product purchases. Only 8 percent of survey respondents cited advertising as being influential. Broken down by category, cereal purchases were the most responsive to promotions and couponing and snack purchases influenced most by merchandising. For more information visit www.marketforce.com.

GM dealer service succeeds in 2010

The outlook for auto dealer service success and customer spending on said dealer service appears challenging, with decreases in service business brought on by depressed auto sales in 2008 and 2009 projected to continue for several years. But dealers who focus their energies on superior service and keeping customers happy (and coming back) may have a better chance of profiting through the drought. Despite General Motors' tumultuous few years, the auto manufacturer managed to secure six of the seven top spots in customer satisfaction in dealer service among mass-market brands, according to the 2010 Customer Service Index (CSI) Study from Westlake Village, Calif., research company J.D. Power and Associates. Lexus placed first in customer satisfaction for luxury brands.

The study examines satisfaction among vehicle owners who visit a service department for maintenance or repair work. The CSI rankings are based on dealer performance during the first three years of ownership, which typically represents the majority of the vehicle warranty period. Five measures are examined to determine overall customer satisfaction with dealer service (listed in order of importance): service quality; service initiation; service advisor; service facility; and vehicle pick-up.

Among mass-market brands, HUMMER ranked highest, with a score of 815, and performed particularly well in the service quality and service facility factors. Also among the top five brands in the mass-market segment were Saturn (808), Buick (805), Chevrolet (787) and MINI (786). Six General Motors brands (including brands GM is divesting) ranked within the top seven in the mass-market segment. Kia and Volkswagen posted the greatest improvements over 2009.

Lexus ranked highest in customer satisfaction with dealer service among luxury brands for the second consecutive year. Lexus achieved an overall CSI score of 837 on a 1,000-point scale and performed particularly well in four of the five measures: service quality; service initiation; service advisor; and service facility. Rounding out the top five in the premium segment were Cadillac (827), Jaguar (822), Acura (817) and BMW (816). Among luxury brands, Cadillac and Mercedes-Benz posted the greatest improvements over 2009.

"Over time, many vehicle owners gradually defect to non-dealer service facilities for repair and maintenance needs, particularly when the warranty period expires," says Jon Osborn, research director at J.D. Power and Associates. "With service customer retention becoming more crucial than ever during the next few years, dealerships must focus on not only providing superior levels of customer service, but also on enhancing convenience for vehicle owners and providing pricing that is more competitive with non-dealer facilities."

Overall satisfaction with dealer service increased from 761 in 2009 to 767 in 2010, marking the tenth consecutive year of industry-wide improvement. Notable improvements were demonstrated in the service facility and service quality measures in 2010, compared with 2009. In particular, satisfaction increased in the following areas: ease of driving in and out of dealer facilities; convenience of parking; thoroughness of the work performed; the total time required to complete service on the vehicle; flexibility of accommodating the customer schedules; and thoroughness of explanations. Several other time-related metrics improved from 2009, including customer ability to get a service appointment on the same day as their initial inquiry call and service being completed the day that the vehicle was brought in for service. For more information visit www.jdpower.com.

Consumers buy brands they 'TrustR'

Trust and recommendation are two key ingredients to brand success, and Amazon.com performs better than the rest in these categories, according to Beyond Trust: Engaging Consumers in the Post-Recession World, a study from research companies Millward Brown, Naperville, Ill., and The Futures Company, Chapel Hill, N.C. The study includes a TrustR metric for understanding and strengthening the bond between consumers and brands, which is calculated by looking at consumer responses to the questions "How trustworthy is this brand?" and "Would you recommend this brand?"

"Consumers are less likely to spend hard-earned money on brands that they don't trust. In fact, we found that the No. 1 TrustR brand in each of the 22 countries we researched was nearly seven times more likely to be purchased, and consumers were 10 times more likely to have formed a strong bond with these brands," says Eileen Campbell, global CEO of Millward Brown.

According to the study, the top 10 most trusted and recommended brands in the U.S. are Amazon.com (123 TrustR score); FedEx (122); Downy (120); Huggies (120); Tide (120); Tylenol (120); Toyota (119 [results prior to recall]); WebMD (119); Pampers (118); and UPS (118). For more information visit www.millwardbrown.com.

Race affinity a major factor in African-Americans' financial decision-making

One-third of African-American consumers consult specific African-American publications when seeking information for making financial decisions, and that number rises to more than half among those with income of $100,000+, according to Financial Insights: The African-American Market, a study from Synergistics Research Corporation, Atlanta. Most widely cited was *Black Enterprise* (19 percent). *Ebony* (17 percent) and *Essence* (16 percent) ranked second and third.

BET (16 percent) was also cited by one in six as a source used for financial information. One-tenth cited using black financial information Web sites and TV One (9 percent) as sources. Less than one-tenth mentioned black-interest radio stations. When asked if they trust and rely on African-American media channels more than mainstream media, four in 10 of those who use African-American media say they do trust it more. For more information visit www.synergisticsresearch.com.

Debt-ridden Americans conquer their financial burdens alone

Dismal news about debt in America: 36 percent of Americans claim to have had trouble paying their bills in the past two years, and of those adults, less than 40 percent sought help from a lender or credit consolidation agency to try to modify their loans, according to data from Chicago research company Mintel.

Women struggled with their debt more than men, as 39 percent said they had trouble during the last two years, compared to 33 percent of men. People age 25-44 and black survey respondents also reported more difficulty than the general population (42 percent of 25-34-year-olds, 48 percent of 35-44-year-olds and 53 percent of blacks). In addition, adults living in urban and rural areas were more likely to struggle when compared to those living in suburban areas.

Only 37 percent of those in trouble with debt reached out for help. Going directly to their credit card or mortgage lender was the most common avenue, with 28 percent of respondents going to their credit card-issuing bank and 24 percent going to their mortgage lender to seek help. Still, more than one-third sought assistance from a credit counseling or debt consolidation service.

Overwhelmingly, those who sought help with debt did so for credit card loans (50 percent of survey respondents). Mortgage debt was the second most common at 36 percent. When asked which loan they would pay if they could afford only one, most respondents said their mortgage (48 percent), instead of credit cards (17 percent) or auto loans (13 percent). For more information visit www.mintel.com.

Product and Service Update

continued from p. 14

Bureau (OVAB) Audience Metrics Guidelines for digital out-of-home place-based media advertising affiliates. The core curriculum is targeted to sales professionals, executives, media consultants and others who desire a better understanding of the digital place-based media industry.

Led by a team of media training instructors, the series includes insights on the agency business, best practices for advertising in traditional media and developing a digital out-of-home media selling strategy. Participants will also learn the role of industry groups such as Outdoor Advertising Associates of America, and the Traffic Audit Bureau, in addition to OVAB, in developing research standards.

Separately, Arbitron has released two studies that feature Portable People Meter (PPM) data information: Black Radio Today 2009, How America Listens to Radio and Hispanic Radio Today 2009, How America Listens to Radio. Both reports are available online at www.arbitron.com/study/grt.asp.

In addition, Arbitron has released PPM Listening for Pro Football, which covers in-game, play-by-play estimates for the 2009-2010 professional football season and includes 25 teams in 23 markets. For more information visit www.arbitron.com.

Vision Critical to support ConvaTec panel

ConvaTec, a Skillman, N.J., medical technology firm, has partnered with Vancouver, B.C., research company Vision Critical to launch an online portal for its ConvaTec Connects Panel for the U.S. While ConvaTec meets with these clinicians for live events throughout the year, the panel is intended to better allow ConvaTec to gather opinion and consensus by regularly polling WOC nurses.

The panel will initially solicit the expertise of a core group of committed WOC nurses who have worked with ConvaTec before and then expand, launching in France, Italy and Germany. Vision Critical will aid ConvaTec with assisted tech support, panel management and study support. For more information visit www.convatec.com.

ComScore gains the Audience Advantage

Reston, Va., research company comScore has launched comScore Audience Advantage, a digital audience optimization platform designed to enable publishers to help advertisers and media planners accurately reach their audiences. Using anonymized data from its proprietary research panel of opt-in Internet users that is aggregated into consumer segments, comScore builds predictive algorithms that can be used by publishers to determine which of their site visitors should receive a particular ad. The predictive algorithms use an array of descriptive consumer variables, including demographics, search activity, site visitation and online and offline transactional behavior. For more information visit www.comscore.com.

Panel management platform aims to simplify panel managers' jobs

Encino, Calif., research company uSamp has introduced a Web-based panel management platform that aims to simplify the delivery of online panel data for market research. Using a suite of technologies, uSamp's online platform includes the following solutions: SampleMarket, a one-stop software solution for panel project management intended to enable clients to work more efficiently with their panels; PanelNet, a tool to build private-label online panels customized to meet the specifications of a brand; PanelShield, a complimentary Web-based system that provides fraud protection to maintain project integrity; and the Panel Book Search feature, which gives clients real-time access into uSamp's panel profiles. For more information visit www.usamp.com.

Radius adds Predictor to suite for marketers

Radius Global Market Research, New York, has debuted Radius Predictor, a proprietary tool intended to integrate consumer tracking data with marketing mix data to evaluate marketing components, tactics and branding strategies. Predictor is designed to create a model that calculates an ideal marketing investment level based on business goals. It also identifies what in the current mix is having the most impact on sales - providing a dollar value contribution for every element and calculating ROI.

Predictor's model also aims to dive into specific marketing components and issues; offer guidance for improving advertising content and countering competitive tactics and strategies; and identify elements of a marketer's operations that trigger increases in consumers' affinity toward the brand. For more information visit www.radius-global.com.

Briefly

Survey Sampling International, a Shelton, Conn., research company, has rolled out SSI Dynamix, an online platform designed to improve the sampling process by delivering a wide reach, effective respondent experience, high data integrity and deep respondent engagement by reaching respondents beyond the panel. SSI Dynamix links to all sources (i.e., Web sites, social media, panels, affiliate partnerships, etc.) to build a balanced live-access stream and then profile participants in real time. For more information visit www.surveysampling.com.

San Francisco research company Peanut Labs has debuted Social Media Australia, its Australia sample, consisting of 226,000+ Aussie respondents. By sampling respondents through online social platforms such as Facebook, Peanut Labs aims to target Aussie residents based on age, gender, employment status and marital status. For more information visit www.peanutlabs.com.

Sequim, Wash., research software company Sawtooth Software has begun offering annual subscription licenses intended to offer a more cost-effective and flexible option for Sawtooth's more active customers. For an annual fee of $15,000, the Corporate Subscription License allows up to 10 users within an organization licenses to several Sawtooth components. For more information visit www.sawtoothsoftware.com/licenseagreement.shtml.

London research company E-Tabs has introduced Precision Reporting, an outsourced report automation solution. Headed by Jon Hackenbroch, Precision Reporting includes 10 reporting executives and is intended to allow clients to benefit from lower consultancy rates via outsourcing. For more information visit www.e-tabs.com.

London research company Research Now has launched B2B and affluent consumer panels in the Middle East. For more information visit www.researchnow.co.uk.

IMS Health, a Norwalk, Conn., research company, has launched IMS Aggregate Spend Compliance Services, a set of solutions intended to help pharmaceutical and medical device companies comply with federal and state transparency and marketing disclosure laws in the U.S., known as "aggregate spend" reporting regulations. For more information visit www.imshealth.com.

San Francisco research company Quantcast has expanded its audience insights offering to include localized delivery for every country. Quantcast audience measurement aims to provide Web site owners with free traffic, demographic, lifestyle, business and geographic audience data. For more information visit www.quantcast.com.

Portland, Ore., research company Webtrends has released Facebook measurement capabilities within Webtrends Analytics 9, the company's online insight and data collection platform. The Facebook measurement tool is designed to provide marketers information on how tabs, apps and share features are performing. For more information visit www.webtrends.com.

continued from p. 16

30 years of age. Finalists will be selected and invited to present at the ESOMAR Congress on September 13-16, 2010, in Athens, Greece.

The Qualitative Research Consultants Association (QRCA), St. Paul, Minn., has initiated its 2010 Global Outreach Scholarship program. The scholarship recipient will receive free registration and reimbursement of up to $1,000 for travel expenses to attend the QRCA annual conference on October 13-15, 2010, in Philadelphia. The deadline to enter is June 4, 2010.

Awards/rankings

Oslo, Norway, research software company **Confirmit** has been recognized as a service leader in the enterprise feedback management category of ***CRM***'s 2010 Service Awards.

Columbia, Md., research company Arbitron Inc.'s executive vice president and CMO **Alton Adams** was named to ***Radio Ink***'s list of Most Influential African-Americans in Radio.

Additionally, Arbitron's multicultural marketing manager **Oveda Brown** was named to ***Radio Ink***'s list of Ones to Watch.

Jeff Eccleston of Sponsorship Research International, Norwalk, Conn., has been named to ***SportsBusiness Journal***'s Forty Under 40 list. Eccleston is the first person in the field of research to receive the award.

East Islip, N.Y., research company **Mktg Inc.** awarded Orem, Utah, research company **Western Wats** the Silver Certification for Opinion Outpost, its online Canadian panel.

New accounts/projects

Microsoft Advertising, Seattle, has selected Reston, Va., research company **comScore**'s Audience Advantage platform to help U.S. consumer packaged goods advertisers reach audiences across Microsoft's online properties, such as MSN and Windows Live.

Bank of America (BOA), Charlotte, N.C., has adopted Leeds, U.K., research company **Nunwood**'s Fizz knowledge management platform for its Europe Card Services. Under the agreement, Nunwood will build an online research library for BOA.

Facebook, San Francisco, has selected Orem, Utah, research company **Omniture** to measure Facebook ad effectiveness.

Moneysupermarket.com, a U.K. price comparison site, has selected **eDigitalResearch**, Hampshire, U.K., to conduct online consumer opinion surveys.

Research Now, London, has entered into an agreement with **Emirates Airline**, Dubai, United Arab Emirates, to invite members of the airline's loyalty rewards program Skywards to enroll in Research Now's Dallas parent company e-Rewards' opinion panels and earn Skywards miles in exchange for time spent participating in online market research surveys.

QVC, West Chester, Pa., has adopted Reston, Va., research company **Clarabridge**'s content mining platform at its U.S. operation.

Additionally, **Wendy's**, Dublin, Ohio, has selected Clarabridge's text analytics solution for its customer feedback program.

The U.S. General Services Administration (GSA), Washington, D.C., has awarded Menlo Park, Calif., research company **Knowledge Networks** a 20-year contract for conducting survey services for the federal government. Under this five-year base award, with three renewable five-year options, Knowledge Networks will become a preapproved, federally-qualified vendor within GSA.

Palo Alto, Calif., research company **Market Insight Corporation** has signed an agreement with **Tomorrow Management Consulting Corporation**, Beijing, to establish a consumer research model in China.

Shelton, Conn., research company **Survey Sampling International** (SSI) has adopted Westport, Conn., research company **Imperium**'s data validation service Verity. SSI's respondent data will be Verity-certified for accuracy.

Netherlands research company **Out Now Consulting** has expanded its study of gay consumers in Latin America into Europe and has received corporate sponsorship from **Berlin Tourism Marketing** and **Delta Air Lines**, Atlanta.

San Francisco research company **MarketTools Inc.**'s online data quality and validation platform TrueSample has been adopted by three research panel companies: **McMillion Research**, Charleston, W.Va.; **uSamp**, Encino, Calif.; and **Western Wats**, Orem, Utah.

Maponics, a Norwich, Vt., software company, has been chosen by **ZipRealty Inc.**, Emeryville, Calif., to provide neighborhood and zip code boundary data for its online property search and map display features.

New companies/new divisions/relocations/expansions

Chris Brown and Sue Barnes, both former U.K. directors with J.D. Power and Associates, a Westlake Village, Calif., research company, have founded **brownsauce Group**, a Surrey, U.K., research firm. The firm is online at www.brownsaucegroup.com.

Naperville, Ill., research company **Millward Brown** will open a location in Vietnam in 2010. The office will be led by Phil Worthington.

Joey Harmon has founded **Harmon Research Group Inc.**, Anaheim, Calif., with a location in San Jose, Costa Rica. The firm is online at www.harmonresearch.com.

Research company earnings/financial news

The Nielsen Company, New York, announced financial results for the year ended December 31, 2009. Reported revenues were $4,808 million, flat with reported revenues for the year ended December 31, 2008, of $4,806 million. Excluding the impact of currency fluctuations, revenues for the year increased 4 percent. Reported operating income was $116 million, compared to operating income of $421 million for the year prior.

National Research Corporation, Lincoln, Neb., announced results for fourth-quarter and year-end 2009. Quarterly revenue rose 14 percent to $13.8 million, and net income rose 18 percent to $2.2 million. Quarterly earnings per share increased by 18 percent.

BrainJuicer Group PLC, London, announced results for the 12 months ended December 31, 2009. The company achieved 27 percent revenue growth compared to the previous year (£11,814,000 in 2009 over £9,322,000 in 2008); 27 percent growth in operating profit (£1,645,000 over £1,290,000); 21 percent increase in pre-tax profit (£1,658,000 over £1,372,000); and 22 percent growth in fully-diluted earnings per share (9.0p over 7.4p).

Ipsos, Paris, reported 2009 revenue of 943.7 million euros, down 3.6 percent compared to 2008.

B2B International, Manchester, U.K., increased sales by 10 percent in 2009.

Names of Note

continued from p. 12

New York research company *LogicLab* has hired **Tony Sherman** as director, product operations, and **Michael Lazarro** as vice president, analytics. Sherman will work out of the company's Boston office.

San Francisco research company *Motally* has appointed **John Forese** as CEO.

Mustapha Tabba has been promoted to COO of Ipsos Middle East and North Africa (MENA), a division of Paris research company *Ipsos*. Tabba will continue serving as managing director at Ipsos Jordan and oversee Ipsos Loyalty activities in MENA as regional director.

Planet Retail, a London research company, has named **Brian Wisniewski** senior vice president, North America. He will be based in the company's Park Ridge, Ill., office.

ORC, a Princeton, N.J., research company, has hired **Nancy Bray** as director, research, technology. Bray will be based in San Francisco.

Berkeley, Calif., research company *NeuroFocus* has named **Barry Herstein**, **Adam Gazzaley** and **Eric R. Kandel** to its advisory board.

Vincent Bruzzese has been appointed to lead Los Angeles research company *OTX*'s Motion Picture Group.

Phoenix Marketing International, a Rhinebeck, N.Y., research company, has appointed **Donald Holtz** as co-president, business intelligence.

Shoaib Oosman has joined Cologne, Germany, research company *Globalpark* as director, sales, U.K.

questions you should ask when…

selecting a moderator

1>>> Can you help me pick the right methodology?

Your researcher should consult with you to determine the best qualitative methodology for your project. While well-executed focus groups are enormously valuable, each product, client and research outcome is different, and therefore the research methodologies should be customized to the desired outcomes. Many factors go into determining the best methodology to achieve the project goals, including cost, time, convenience and available technology.

2>>> After the project is completed, what are your deliverables?

Most qualitative researchers offer a variety of reporting approaches ranging from written report (toplines, executive summaries, full reports, etc.) to in-person presentations. The type of reporting will vary depending on your needs and pricing considerations. At the end of the project your organization should have learned more about how your customers feel in a way that aligns your marketing efforts with the needs of your customers.

3>>> Can you help me determine where should we hold our focus groups?

A skilled qualitative researcher should be able to help you choose which market or markets to visit. Obviously, you should interview people in the markets where you have customers. If you are in many markets, you should pick representative markets, but also consider a good spread by geography and size of market. As the economy grows ever more global, regional differences in many product categories have been evaporating. However, with some categories regionality is still important.

4>>> What is your philosophy of moderating?

The answer should be in line with the client's general approach to marketing research and also align with the client's corporate culture and with the type of product or service being researched. For example, if the client firm is a staid, no-nonsense company, its in-house researchers may not be comfortable with a moderator who uses a variety of exploratory projective techniques.

5>>> How do you prepare for a study?

A good moderator learns about the client's product/service and its major competition by, for example, reviewing one year's issues of an industry magazine, looking at industry Web sites, examining products in stores or using the products.

6>>> Here are my project objectives - what would be the best qualitative approach to accomplish them?

Keep an open mind as to which is the best methodology: online or offline, focus groups or in-depth interviews, ethnography or in a facility. Think about your customers - how they can be reached best and how well would they respond to each methodology? A strong qualitative researcher should be able to consult with you and help you identify the best methodologies for your project.

7>>> How do you handle the interview/focus group if the materials you are exploring draw highly negative reactions?

A good moderator explores respondents' reactions in an open-ended manner, then, as needed, offers respondents more information, explains other ways of looking at the concept and probes for possible positive points - all in a non-leading way.

Special thanks to the Qualitative Research Consultants Association and Judy Langer, president of New York-based Langer Qualitative, for providing input on the questions and responses.

2010

Focus Group Moderator Directory

This directory was compiled by mailing, e-mailing and faxing listing forms to companies that we identified as having on-staff focus group moderators. Each firm was given a free basic listing including one on-staff moderator and also had the option to purchase a write-up, company logo insertion and industry and market cross-reference categories. We list 1,100+ moderators at over 900 firms.

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

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(See advertisement on p. 59)

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Envision Research, Inc. (GA) p. 79
Just The Facts, Inc. (IL) p. 87
The Livingston Group for Marketing, Inc. (NH) p. 89
Practical Imagination Enterprises (NJ) p. 96
SofoS Market Research Consulting (WI) p. 101

Cereals

C&R Research Services, Inc. (IL) p. 73
City Research Solutions (WI) p. 74
Envision Research, Inc. (GA) p. 79
Focus Latino (TX) p. 80
Frieden Qualitative Services (CA) p. 81
Just The Facts, Inc. (IL) p. 87
Felipe Korzenny Research & Consulting (FL) p. 87
The Livingston Group for Marketing, Inc. (NH) p. 89
Morpace Inc. (MI) p. 93
Practical Imagination Enterprises (NJ) p. 96
SofoS Market Research Consulting (WI) p. 101

Children

C&R Research Services, Inc. (IL) p. 73
Camille Carlin Qualitative Research, Inc. (NY) p. 74
Creative Consumer Research (TX) p. 76
Doyle Research Associates, Inc. (IL) p. 79
Envision Research, Inc. (GA) p. 79
Focus Latino (TX) p. 80
Just The Facts, Inc. (IL) p. 87
Listen Research, Inc. (CA) p. 88
Morpace Inc. (MI) p. 93
Perceptive Market Research, Inc. (FL) p. 95
Primary Insights, Inc. (IL) p. 96
Schwartz Consulting Partners, Inc. (FL) p. 100
SofoS Market Research Consulting (WI) p. 101
Springboard Marketing Research & Consulting (CA) p. 101
SRA Research Group, Inc. (FL) p. 101

College Students

Abbott Research & Consulting (ON) p. 70
Alternate Routes, Inc. (CA) p. 70
Focus Latino (TX) p. 80
Diane Iseman & Associates (OH) p. 86
Just The Facts, Inc. (IL) p. 87
Kinzey & Day Qual. Market Research (VA) p. 87
Felipe Korzenny Research & Consulting (FL) p. 87
Perceptive Market Research, Inc. (FL) p. 95
Schwartz Consulting Partners, Inc. (FL) p. 100
SofoS Market Research Consulting (WI) p. 101
Springboard Marketing Research & Consulting (CA) p. 101

Communications

Alternate Routes, Inc. (CA) p. 70
CMI (GA) p. 74
Consumer Focus LLC (TX) p. 75
Daniel Research Group (MA) p. 76
Frieden Qualitative Services (CA) p. 81
Horowitz Associates, Inc. (NY) p. 84
IFOP North America (ON) p. 84
Diane Iseman & Associates (OH) p. 86
Issues and Answers Network, Inc. (VA) p. 86
J.L. Roth & Associates, Inc. (FL) p. 86
Kinzey & Day Qual. Market Research (VA) p. 87
Felipe Korzenny Research & Consulting (FL) p. 87
Langer Qualitative LLC (NY) p. 88
the research house (MI) p. 98
RMS Communications and Research Inc. (CA) p. 99
Schwartz Consulting Partners, Inc. (FL) p. 100
Springboard Marketing Research & Consulting (CA) p. 101
Survey Center Focus, LLC (IL) p. 102
Vance & Associates Qualitative Research (CA) p. 103

Computer-Hardware

Daniel Research Group (MA) p. 76
Decision Analyst, Inc. (TX) p. 78
Frieden Qualitative Services (CA) p. 81
HumanCentric (NC) p. 84
QualCore.com Inc. (MN) p. 97

Computers

Alternate Routes, Inc. (CA) p. 70
Daniel Research Group (MA) p. 76
Diane Iseman & Associates (OH) p. 86
J.L. Roth & Associates, Inc. (FL) p. 86
Felipe Korzenny Research & Consulting (FL) p. 87
MarketVibes, Inc. (IN) p. 91
Planet Latino Market Intelligence, Inc. (FL) p. 96
QualCore.com Inc. (MN) p. 97
REALeResearch (CA) p. 98
SIGMA: Research Management Group (OH) p. 100

Computer-Software

Daniel Research Group (MA) p. 76
Decision Analyst, Inc. (TX) p. 78
HumanCentric (NC) p. 84
J.L. Roth & Associates, Inc. (FL) p. 86
Listen Research, Inc. (CA) p. 88
Morpace Inc. (MI) p. 93
QualCore.com Inc. (MN) p. 97
Schwartz Consulting Partners, Inc. (FL) p. 100

Construction Industry

City Research Solutions (WI) p. 74
Creative Consumer Research (TX) p. 76
Focus Latino (TX) p. 80
J.L. Roth & Associates, Inc. (FL) p. 86
Just The Facts, Inc. (IL) p. 87
Loretta Marketing Group (FL) p. 89
Millennium Research, Inc. (MN) p. 92
Morpace Inc. (MI) p. 93
Schwartz Consulting Partners, Inc. (FL) p. 100

Construction-Residential

Abbott Research & Consulting (ON) p. 70
Creative Consumer Research (TX) p. 76
Just The Facts, Inc. (IL) p. 87
The Kiemle Company (SC) p. 87

Consumer Durables

Abbott Research & Consulting (ON) p. 70
C&R Research Services, Inc. (IL) p. 73
City Research Solutions (WI) p. 74
Doyle Research Associates, Inc. (IL) p. 79
Frieden Qualitative Services (CA) p. 81
HumanCentric (NC) p. 84
Diane Iseman & Associates (OH) p. 86
Issues and Answers Network, Inc. (VA) p. 86
Just The Facts, Inc. (IL) p. 87
Precision Research, Inc. (IL) p. 96
Primary Insights, Inc. (IL) p. 96
SofoS Market Research Consulting (WI) p. 101

Consumer Services

Abbott Research & Consulting (ON) p. 70
C&R Research Services, Inc. (IL) p. 73
Rebeca Cantu Helmstetler (CO) p. 73
Consumer Focus LLC (TX) p. 75
Creative Consumer Research (TX) p. 76
Daniel Research Group (MA) p. 76
e-FocusGroups (CA) p. 79
Frieden Qualitative Services (CA) p. 81
Horowitz Associates, Inc. (NY) p. 84
Diane Iseman & Associates (OH) p. 86
J.L. Roth & Associates, Inc. (FL) p. 86
Langer Qualitative LLC (NY) p. 88
MRSI (Marketing Research Services, Inc.) (OH) p. 93
Perceptive Market Research, Inc. (FL) p. 95
Practical Imagination Enterprises (NJ) p. 96
Profile Marketing Research, Inc. (FL) p. 96
Schwartz Consulting Partners, Inc. (FL) p. 100
Springboard Marketing Research & Consulting (CA) p. 101
Ten People Talking (WA) p. 102
Vance & Associates Qualitative Research (CA) p. 103
Zwillinger Research (CA) p. 104

Consumers

Alternate Routes, Inc. (CA) p. 70
C&R Research Services, Inc. (IL) p. 73
C.L. Gailey Research (CA) p. 73
CMI (GA) p. 74
Consumer Focus LLC (TX) p. 75
Daniel Research Group (MA) p. 76
DLG Research & Marketing Solutions (TX) p. 78
DMCotter Research & Strategy, Inc. (MA) p. 78
Envision Research, Inc. (GA) p. 79
Frieden Qualitative Services (CA) p. 81
Great Questions, LLC (MO) p. 82
Horowitz Associates, Inc. (NY) p. 84
Wayne Howard & Associates (CA) p. 84
IFOP North America (ON) p. 84
Diane Iseman & Associates (OH) p. 86
Issues and Answers Network, Inc. (VA) p. 86
J.L. Roth & Associates, Inc. (FL) p. 86
JRH Marketing Services, Inc. (NY) p. 86
Just The Facts, Inc. (IL) p. 87
Felipe Korzenny Research & Consulting (FL) p. 87
The Livingston Group for Marketing, Inc. (NH) p. 89
MarketVibes, Inc. (IN) p. 91
Morpace Inc. (MI) p. 93
MRSI (Marketing Research Services, Inc.) (OH) p. 93
Observant, LLC (MA) p. 94
O'Donnell Consulting (PA) p. 94
Perceptive Market Research, Inc. (FL) p. 95
Planet Latino Market Intelligence, Inc. (FL) p. 96
Primary Insights, Inc. (IL) p. 96
Profile Marketing Research, Inc. (FL) p. 96
QualCore.com Inc. (MN) p. 97
Research Explorers, Inc. (IL) p. 98
The Research Group, Inc. (MD) p. 98
the research house (MI) p. 98
S I S International Research, Inc. (NY) p. 99
Sabena Qualitative Research Services (CT) p. 99
SofoS Market Research Consulting (WI) p. 101
Springboard Marketing Research & Consulting (CA) p. 101
SRA Research Group, Inc. (FL) p. 101
Survey Center Focus, LLC (IL) p. 102
Talking Business (CA) p. 102
Ten People Talking (WA) p. 102
WorldOne Research (U.K.) p. 104

Cosmetics

C&R Research Services, Inc. (IL) p. 73
Decision Analyst, Inc. (TX) p. 78
Focus Latino (TX) p. 80
IFOP North America (ON) p. 84
Felipe Korzenny Research & Consulting (FL) p. 87
The Livingston Group for Marketing, Inc. (NH) p. 89
SofoS Market Research Consulting (WI) p. 101

CPAs/Financial Advisors

Abbott Research & Consulting (ON) p. 70
J.L. Roth & Associates, Inc. (FL) p. 86

Dentists

Camille Carlin Qualitative Research, Inc. (NY) p. 74
Just The Facts, Inc. (IL) p. 87
KGC (FL) p. 87
Sabena Qualitative Research Services (CT) p. 99
WorldOne Research (U.K.) p. 104

Direct Marketing/Direct Response

C&R Research Services, Inc. (IL) p. 73
Consumer Focus LLC (TX) p. 75
Frieden Qualitative Services (CA) p. 81
J.L. Roth & Associates, Inc. (FL) p. 86
MCC Qualitative Consulting (NJ) p. 92

Education

Creative Consumer Research (TX) p. 76
Focus Latino (TX) p. 80
GKS Consulting LLC (IL) p. 82
Harvest Research Center (IA) p. 83
Just The Facts, Inc. (IL) p. 87
Kinzey & Day Qual. Market Research (VA) p. 87
Felipe Korzenny Research & Consulting (FL) p. 87
Listen Research, Inc. (CA) p. 88
MarketVibes, Inc. (IN) p. 91
Morpace Inc. (MI) p. 93
Perceptive Market Research, Inc. (FL) p. 95
QualCore.com Inc. (MN) p. 97
SofoS Market Research Consulting (WI) p. 101
Springboard Marketing Research & Consulting (CA) p. 101
Vance & Associates Qualitative Research (CA) p. 103

Educators (Schools/Teachers)

Electronics

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Entrepreneurs/Small Business

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Executives/Management

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Financial/Investment/Banks

Food Chains/Supermarkets

Foods/Nutrition

Gaming/Casinos

Gay & Lesbian

Generation X

Government

Health & Beauty Aids

Sabena Qualitative Research Services (CT) p. 99
Schwartz Consulting Partners, Inc. (FL) p. 100
SofoS Market Research Consulting (WI) p. 101
Springboard Marketing Research & Consulting (CA) p. 101
Talking Business (CA) p. 102
Ten People Talking (WA) p. 102

Health Care

Alternate Routes, Inc. (CA) p. 70
Appel Research, LLC (DC) p. 70
Burke, Incorporated (OH) p. 73
C&R Research Services, Inc. (IL) p. 73
C.L. Gailey Research (CA) p. 73
Campbell-Communications, Inc. (NY) p. 73
Camille Carlin Qualitative Research, Inc. (NY) p. 74
City Research Solutions (WI) p. 74
CMI (GA) p. 74
CRC Research (BC) p. 76
CRC Research (QC) p. 76
Creative Consumer Research (TX) p. 76
D/R/S HealthCare Consultants (NC) p. 76
Doyle Research Associates, Inc. (IL) p. 79
Envision Marketing Research (QC) p. 79
Focus Latino (TX) p. 80
Frieden Qualitative Services (CA) p. 81
The Henne Group (CA) p. 83
The Henne Group (Br.) (NY) p. 83
Herrera Communications (CA) p. 83
Hispanic Research Inc. (NJ) p. 84
Wayne Howard & Associates (CA) p. 84
IFOP North America (ON) p. 84
Diane Iseman & Associates (OH) p. 86
Issues and Answers Network, Inc. (VA) p. 86
J.L. Roth & Associates, Inc. (FL) p. 86
JRH Marketing Services, Inc. (NY) p. 86
Just The Facts, Inc. (IL) p. 87
KGC (FL) p. 87
Kinzey & Day Qual. Market Research (VA) p. 87
Felipe Korzenny Research & Consulting (FL) p. 87
Listen Research, Inc. (CA) p. 88
Lohs Research Group (IL) p. 89
MarketVibes, Inc. (IN) p. 91
MCC Qualitative Consulting (NJ) p. 92
Morpace Inc. (MI) p. 93
Observant, LLC (MA) p. 94
O'Donnell Consulting (PA) p. 94
Outsmart Marketing (MN) p. 95
Perceptive Market Research, Inc. (FL) p. 95
Planet Latino Market Intelligence, Inc. (FL) p. 96
Practical Imagination Enterprises (NJ) p. 96
Research Explorers, Inc. (IL) p. 98
The Research Group, Inc. (MD) p. 98
RMS Communications and Research Inc. (CA) p. 99
Sabena Qualitative Research Services (CT) p. 99
Schwartz Consulting Partners, Inc. (FL) p. 100
Shugoll Research (MD) p. 100
SIGMA: Research Management Group (OH) p. 100
SofoS Market Research Consulting (WI) p. 101
Solomon Solutions (NJ) p. 101
SRA Research Group, Inc. (FL) p. 101
Survey Center Focus, LLC (IL) p. 102
Ten People Talking (WA) p. 102
Vance & Associates Qualitative Research (CA) p. 103
Vedanta Research (NC) p. 103
WorldOne Research (U.K.) p. 104

Health Care Products-Natural

Alternate Routes, Inc. (CA) p. 70
C&R Research Services, Inc. (IL) p. 73
City Research Solutions (WI) p. 74
Wayne Howard & Associates (CA) p. 84
KGC (FL) p. 87
MarketVibes, Inc. (IN) p. 91
O'Donnell Consulting (PA) p. 94
SofoS Market Research Consulting (WI) p. 101
Springboard Marketing Research & Consulting (CA) p. 101
Talking Business (CA) p. 102
Ten People Talking (WA) p. 102

Higher Education

Creative Consumer Research (TX) p. 76
GKS Consulting LLC (IL) p. 82
J.L. Roth & Associates, Inc. (FL) p. 86
Just The Facts, Inc. (IL) p. 87
Kinzey & Day Qual. Market Research (VA) p. 87
Perceptive Market Research, Inc. (FL) p. 95
Springboard Marketing Research & Consulting (CA) p. 101

High-Tech

Daniel Research Group (MA) p. 76
First Insights (NY) p. 80
J.L. Roth & Associates, Inc. (FL) p. 86
Listen Research, Inc. (CA) p. 88
MarketVibes, Inc. (IN) p. 91
Planet Latino Market Intelligence, Inc. (FL) p. 96
Precision Research, Inc. (IL) p. 96
QualCore.com Inc. (MN) p. 97
Shugoll Research (MD) p. 100

Hispanic

C&R Research Services, Inc. (IL) p. 73
Rebeca Cantu Helmstetler (CO) p. 73
Creative Consumer Research (TX) p. 76
DLG Research & Marketing Solutions (TX) p. 78
Eureka Facts, LLC (MD) p. 79
Focus Latino (TX) p. 80
Harvest Research Center (IA) p. 83
Herrera Communications (CA) p. 83
Hispanic Marketing Insights, LLC (OH) p. 84
Hispanic Research Inc. (NJ) p. 84
Horowitz Associates, Inc. (NY) p. 84
Felipe Korzenny Research & Consulting (FL) p. 87
Loretta Marketing Group (FL) p. 89
Market Research Dallas (TX) p. 90
MBC Research Center (NY) p. 91
MRSI (Marketing Research Services, Inc.) (OH) p. 93
New World Hispanic Research (FL) p. 93
Perceptive Market Research, Inc. (FL) p. 95
Planet Latino Market Intelligence, Inc. (FL) p. 96
Rincon & Associates (TX) p. 98
Schwartz Consulting Partners, Inc. (FL) p. 100
361 Degrees Consulting, Inc. (CA) p. 103

Home Improvement/DIY

A & K Research, Inc. (MI) p. 70
Doyle Research Associates, Inc. (IL) p. 79
Focus Latino (TX) p. 80
J.L. Roth & Associates, Inc. (FL) p. 86
Just The Facts, Inc. (IL) p. 87
The Kiemle Company (SC) p. 87
Felipe Korzenny Research & Consulting (FL) p. 87
Morpace Inc. (MI) p. 93
Roller Marketing Research (VA) p. 99
Sabena Qualitative Research Services (CT) p. 99

Hospitality Industry

C&R Research Services, Inc. (IL) p. 73
CMI (GA) p. 74
Consumer Truth® Ltd (IL) p. 75
Horowitz Associates, Inc. (NY) p. 84
Insight Casino Research, LLC (CT) p. 85
J.L. Roth & Associates, Inc. (FL) p. 86
Jacobs Jenner & Kent (MD) p. 86
Kinzey & Day Qual. Market Research (VA) p. 87
Felipe Korzenny Research & Consulting (FL) p. 87
Schwartz Consulting Partners, Inc. (FL) p. 100

Hospitals

Creative Consumer Research (TX) p. 76
D/R/S HealthCare Consultants (NC) p. 76
Wayne Howard & Associates (CA) p. 84
Just The Facts, Inc. (IL) p. 87
KGC (FL) p. 87
Kinzey & Day Qual. Market Research (VA) p. 87
Morpace Inc. (MI) p. 93
Observant, LLC (MA) p. 94
O'Donnell Consulting (PA) p. 94
Perceptive Market Research, Inc. (FL) p. 95
The Research Group, Inc. (MD) p. 98
Schwartz Consulting Partners, Inc. (FL) p. 100
SRA Research Group, Inc. (FL) p. 101
Ten People Talking (WA) p. 102
WorldOne Research (U.K.) p. 104

Household Products/ Services

C&R Research Services, Inc. (IL) p. 73
Doyle Research Associates, Inc. (IL) p. 79
Focus Latino (TX) p. 80
Diane Iseman & Associates (OH) p. 86
Issues and Answers Network, Inc. (VA) p. 86
J.L. Roth & Associates, Inc. (FL) p. 86
JRH Marketing Services, Inc. (NY) p. 86
The Livingston Group for Marketing, Inc. (NH) p. 89
Morpace Inc. (MI) p. 93
Primary Insights, Inc. (IL) p. 96
SofoS Market Research Consulting (WI) p. 101
Talking Business (CA) p. 102

Housing

Abbott Research & Consulting (ON) p. 70
Just The Facts, Inc. (IL) p. 87
Schwartz Consulting Partners, Inc. (FL) p. 100
Springboard Marketing Research & Consulting (CA) p. 101

Human Resources/ Organizational Dev.

Abbott Research & Consulting (ON) p. 70
C&R Research Services, Inc. (IL) p. 73
Creative Consumer Research (TX) p. 76
Frieden Qualitative Services (CA) p. 81
Horowitz Associates, Inc. (NY) p. 84
J.L. Roth & Associates, Inc. (FL) p. 86
Lohs Research Group (IL) p. 89
Schwartz Consulting Partners, Inc. (FL) p. 100

Information Technology (IT)

Alternate Routes, Inc. (CA) p. 70
CMI (GA) p. 74
Daniel Research Group (MA) p. 76
HumanCentric (NC) p. 84
J.L. Roth & Associates, Inc. (FL) p. 86
Morpace Inc. (MI) p. 93
QualCore.com Inc. (MN) p. 97
Shugoll Research (MD) p. 100
SIGMA: Research Management Group (OH) p. 100
Talking Business (CA) p. 102
Vance & Associates Qualitative Research (CA) p. 103

Insurance

Abbott Research & Consulting (ON) p. 70
Alternate Routes, Inc. (CA) p. 70
Balaban Market Research Consulting (BMRC) (AZ) p. 71
City Research Solutions (WI) p. 74
CMI (GA) p. 74
Consumer Focus LLC (TX) p. 75
First Insights (NY) p. 80
Wayne Howard & Associates (CA) p. 84
Diane Iseman & Associates (OH) p. 86
Just The Facts, Inc. (IL) p. 87
Marketing Leverage, Inc. (FL) p. 91
MCC Qualitative Consulting (NJ) p. 92
Morpace Inc. (MI) p. 93
SRA Research Group, Inc. (FL) p. 101
Ten People Talking (WA) p. 102

International Firms

Horowitz Associates, Inc. (NY) p. 84
Just The Facts, Inc. (IL) p. 87
Loretta Marketing Group (FL) p. 89
Millennium Research, Inc. (MN) p. 92
the research house (MI) p. 98

Internet/Web

Alternate Routes, Inc. (CA) p. 70
C&R Research Services, Inc. (IL) p. 73
Consumer Truth® Ltd (IL) p. 75
Daniel Research Group (MA) p. 76
First Insights (NY) p. 80
Frieden Qualitative Services (CA) p. 81
Horowitz Associates, Inc. (NY) p. 84
J.L. Roth & Associates, Inc. (FL) p. 86
Felipe Korzenny Research & Consulting (FL) p. 87
MCC Qualitative Consulting (NJ) p. 92
QualCore.com Inc. (MN) p. 97
REALeResearch (CA) p. 98
Schwartz Consulting Partners, Inc. (FL) p. 100
Solomon Solutions (NJ) p. 101
Talking Business (CA) p. 102

Lawn & Garden

Diane Iseman & Associates (OH) p. 86
Just The Facts, Inc. (IL) p. 87
Millennium Research, Inc. (MN) p. 92
Schwartz Consulting Partners, Inc. (FL) p. 100
SofoS Market Research Consulting (WI) p. 101

Lawyers

Creative Consumer Research (TX) p. 76

Legal

Market Research Dallas (TX) p. 90
Morpace Inc. (MI) p. 93

Leisure

Just The Facts, Inc. (IL) p. 87
SofoS Market Research Consulting (WI) p. 101
Springboard Marketing Research & Consulting (CA) p. 101

Managed Care

Frieden Qualitative Services (CA) p. 81
Wayne Howard & Associates (CA) p. 84
Issues and Answers Network, Inc. (VA) p. 86
KGC (FL) p. 87
Marketing Leverage, Inc. (FL) p. 91
Morpace Inc. (MI) p. 93
Observant, LLC (MA) p. 94
Ten People Talking (WA) p. 102

Manufacturing

Just The Facts, Inc. (IL) p. 87
Schwartz Consulting Partners, Inc. (FL) p. 100

Mass Merchandisers

Focus Latino (TX) p. 80
Just The Facts, Inc. (IL) p. 87
Morpace Inc. (MI) p. 93

Meat Industry

City Research Solutions (WI) p. 74
Perceptive Market Research, Inc. (FL) p. 95
SofoS Market Research Consulting (WI) p. 101

Media

Alternate Routes, Inc. (CA) p. 70
DMCotter Research & Strategy, Inc. (MA) p. 78
Harvest Research Center (IA) p. 83
Horowitz Associates, Inc. (NY) p. 84
Issues and Answers Network, Inc. (VA) p. 86
J.L. Roth & Associates, Inc. (FL) p. 86
Felipe Korzenny Research & Consulting (FL) p. 87
Langer Qualitative LLC (NY) p. 88
Targoz Strategic Marketing (TN) p. 102

Medical

Balaban Market Research Consulting (BMRC) (AZ) p. 71
Camille Carlin Qualitative Research, Inc. (NY) p. 74
Creative Consumer Research (TX) p. 76
D/R/S HealthCare Consultants (NC) p. 76
Frieden Qualitative Services (CA) p. 81
Wayne Howard & Associates (CA) p. 84
HumanCentric (NC) p. 84
IFOP North America (ON) p. 84
Diane Iseman & Associates (OH) p. 86
Issues and Answers Network, Inc. (VA) p. 86
Just The Facts, Inc. (IL) p. 87
KGC (FL) p. 87
Kinzey & Day Qual. Market Research (VA) p. 87
MBC Research Center (NY) p. 91
Morpace Inc. (MI) p. 93
Observant, LLC (MA) p. 94
O'Donnell Consulting (PA) p. 94
Perceptive Market Research, Inc. (FL) p. 95
Sabena Qualitative Research Services (CT) p. 99
Shugoll Research (MD) p. 100
Ten People Talking (WA) p. 102
Vedanta Research (NC) p. 103
WorldOne Research (U.K.) p. 104

Medical/Surgical Products

D/R/S HealthCare Consultants (NC) p. 76
Decision Analyst, Inc. (TX) p. 78
Frieden Qualitative Services (CA) p. 81
Wayne Howard & Associates (CA) p. 84
IFOP North America (ON) p. 84
Issues and Answers Network, Inc. (VA) p. 86
Just The Facts, Inc. (IL) p. 87
KGC (FL) p. 87
Observant, LLC (MA) p. 94
O'Donnell Consulting (PA) p. 94
Schwartz Consulting Partners, Inc. (FL) p. 100

Middle-Eastern

Horowitz Associates, Inc. (NY) p. 84

Military

Focus Latino (TX) p. 80

Mothers

Alternate Routes, Inc. (CA) p. 70
C&R Research Services, Inc. (IL) p. 73
Focus Latino (TX) p. 80
Diane Iseman & Associates (OH) p. 86

Mothers-Expectant

Newspapers/Magazines

Non-Profit/Fund Raising

Nurses

Nursing Homes

Office Products

Packaged Goods

Paper & Related Products

Parents

Pet Foods/Supplies

Petroleum Products

Pharmaceutical Products

Pharmacies/Drug Stores

Pharmacists

Photography

Physicians

Public Affairs

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Publishing

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Retailing

Seniors/Mature

Shopping Centers

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Teens

Telecommunications

Television

Theme Parks

Tourism

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Transportation

Travel

Utilities/Energy

Veterinary Medicine

Yellow Pages


By: Your Name Here

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

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Z

calendar of events

Featured Events

Globalpark will host a complimentary one-hour Webinar, themed "Mobile Research: Best Practices to Capture Immediate, In-The-Moment Feedback," on **June 9**. For more information visit www.globalpark.com/events.

Maritz Research will host a Webinar, themed "Putting the Pieces Together: A Strategy for the Alignment of Brand, Employee, Channel Partner and Customer Experience Research," on **May 27**. Rick Garlick, senior director, consulting and strategic implementation, Maritz, will present and discuss combining the various components of corporate research to tell a clear, actionable story. To register visit http://quirks.webex.com.

The AAPOR will host its 65th annual conference on **May 13-16** at the Marriott Downtown Chicago in Chicago. For more information visit www.aapor.org.

Mature Marketing and Research LLC will sponsor a workshop, themed "Marketing to Boomers and Beyond - How To Build Your Business With The Mature Consumer," on **May 14** at the Marriott Hotel in New York. For more information visit www.beyondboomers.com/workshop.html.

The Pharmaceutical Business Intelligence and Research Group will hold its annual AGM conference on **May 16-19** in Naples, Fla. For more information visit www.pbirg.com.

The QRCA and the *Association for Qualitative Research* will hold a conference on qualitative research, themed "Inspiration in Action," on **May 19-21** in Prague, Czech Republic. For more information visit www.inspirationinaction2010.org.

ESOMAR will hold its annual Latin America conference on **May 23-25** in Cartagena, Colombia. For more information visit www.esomar.org/latam.

Research Magazine will hold a conference on social research on **May 26** in London. For more information visit www.research-live.com.

Together, *SKIM* and *Sawtooth Software* will hold the annual European software conference on **May 26-28** in Cologne, Germany. For more information visit www.skimgroup.com/skim-event-2010.

Research Magazine will hold a conference on social research on **May 26** in London. For more information visit www.research-live.com.

The Mystery Shopping Providers Association will hold its annual Europe conference on **May 27-29** in Istanbul, Turkey. For more information visit www.mysteryshop.org.

CASRO will hold its annual technology conference on **May 28-29** at the Millennium Broadway Hotel in New York. For more information visit www.casro.org.

The MRIA will hold its annual conference on **May 30-June 2** in Toronto. For more information visit www.mria-arim.ca.

The Life Insurance and Market Research Association will hold a marketing and research conference on **June 2-4** at Disney's Yacht Club Resort in Orlando, Fla. For more information visit www.limra.com.

The Southern African Marketing Research Association will hold its annual conference on **June 3-4** at the Mount Grace Country House and Spa in Magaliesburg, South Africa. For more information visit www.samra.co.za.

The Marketing Research Association will hold its annual conference on **June 9-11** in Boston. For more information visit www.mra-net.org.

The ARF will hold a conference, themed "Audience Measurement 5.0," on **June 15-16** at The New York Marriott Marquis Hotel in New York. For more information visit www.thearf.org/assets/am-5.

Gartner will hold its customer relationship management summit on **June 28-30** at Century Plaza in Los Angeles. For more information visit www.gartner.com.

Centaur, in association with the *Market Research Society*, will hold its annual Insight Show as part of MarketingWeek Live on **June 29-30** at Grand Hall in Olympia, London. For more information visit www.insightshow.co.uk.

IIR will hold a conference, themed "Shopper Insights in Action," on **July 12-16** at the Hilton and Towers in Chicago. For more information visit www.shopperinsightsevent.com.

ESOMAR will hold its annual congress, themed "Odyssey 2010 - The Changing Face of Market Research," on **September 12-15** in Athens, Greece. For more information visit www.esomar.org.

The Mystery Shopping Providers Association will hold its annual conference on **September 21-23** at the Hotel InterContinental in Chicago. For more information visit www.mysteryshop.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.

index of advertisers

By Joseph Rydholm
Quirk's editor

Landmark health care bill contained win for researchers

Though many researchers may not have known it, there was a reason to cheer when President Obama signed the Patient Protection and Affordable Care Act into law in March.

Thanks to the efforts of the Pharmaceutical Marketing Research Group (PMRG), a trade association representing pharmaceutical and medical device manufacturers and their marketing research consultants, the health care bill included a modified version of the Physician Payment Sunshine Act (PPSA) - which was intended to shed light on the financial relationships and potential conflicts of interest between physicians and the pharmaceutical and medical device industries - that effectively excludes the honoraria that are usually paid to doctors for taking part in scientific survey and marketing research from the Sunshine Act's reporting requirements.

As detailed in PMRG press materials, the PPSA requires disclosure of payments or gifts of value from pharmaceutical and medical device companies to physicians. Disclosure is to be reported to the Department of Health and Human Services, which in turn will post on a public Web site how much was paid to specific physicians by specific manufacturers.

In its original wording, the PPSA contained language that could have (albeit likely unintentionally) included public reporting of survey honoraria paid to physicians.

The PMRG argued that the public reporting of survey honoraria would not only chill and skew important health care survey research but would facilitate the very marketing abuses that the PPSA was intended to eliminate by revealing the names of surveyed physicians to pharmaceutical and medical device manufacturers.

In a press statement, PMRG Government Affairs Chair Bill Little said, "Our concern was that survey and marketing research was not originally granted an exclusion from the disclosure requirement. After all, the purpose of survey and marketing research is to understand the opinions, beliefs and behaviors of populations, including physicians, on various subject matters - not to influence them to behave in any way. As originally written, the PPSA seemed to require incentives paid for participation in research studies to be disclosed publicly. Public disclosure would have adversely impacted our ability to recruit physician respondents, potentially biased the responses of physicians whom we did recruit, and advertised to manufacturers the otherwise anonymous identities of survey participants."

Undermine the integrity

The PMRG began working in the spring of 2009 to hold meetings with Senate and House staff members to explain how survey and marketing research differs from marketing, the important roles that survey and marketing research serve in medicine, and how the PPSA, as drafted, would undermine the integrity of survey and marketing research with physician respondents.

PMRG successfully introduced language into the act that excludes marketing research from the public disclosure requirements, as long as the honoraria are paid by manufacturers through third parties (e.g., survey and marketing research consultants) and the manufacturers do not know the identities of participating physicians.

PMRG was supported in its advocacy by the Marketing Research Association and Council of American Survey Research Organizations.

Establish a guideline

The PMRG press materials note that its win in Congress will not necessarily preclude states from enacting laws that include the reporting of survey and marketing research honoraria within their own versions of the PPSA. PMRG believes, however, that the federal act, at a minimum, will establish a guideline for state legislators and regulatory agencies in this realm.

"Understandably the intent of the PPSA is to diminish improper marketing practices on the part of manufacturers by requiring public disclosure of physician payments and potential conflicts of interest," said Debbie Kossman, president of the PMRG, in a press statement. "Survey and marketing research, however, is not a tool to influence research participants to think or behave in any way, and confidentiality ensures that there is no potential for undue influence of a pharmaceutical manufacturer on physicians. We are very pleased that our organization's efforts have succeeded at safeguarding the confidentiality of physician respondents and the integrity of survey and marketing research." | Q

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Coming in the June issue...

Case study: Marriott

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Read about a macro-multivariate approach to measuring three types of marketing-mix variables for pharmaceutical products and their impact on pharmaceutical sales dollars.

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Conference budgets tight? Use this discount for TMRE!

Interested in attending The Market Research Event (TMRE) this November? Quirk's is the premier media partner of TMRE, and as a Quirk's subscriber, you can mention priority code QUIRKSNEWS to receive a 20 percent discount when registering. TMRE will be held on November 8-10 at the Hilton San Diego Bayfront. Visit www.iirusa.com/research for more information and to register.

cover-to-cover

Facts, figures and insights from this month's issue

> The bad news was, there weren't a lot of positive feelings about the auto repair experience. The good news? Lots of opportunity to move ahead of the competition. There was nowhere to go but up, and Midas wasn't alone in underachieving. *(page 28)*

> One way in which tabletop shapes may affect group dynamics is the proximity factor. Business management studies have found that participant dissent is more likely when individuals sit around rectangular surfaces than when they sit around circular or similarly-rounded ones. *(page 34)*

> The power strip has become a kitchen standard and consumers move furniture about in an effort to redesign what could have been designed well to begin with. Consumers are looking for practicality and informed industrial design that blends physical reality with technological developments to create solutions that work in real lives. *(page 45)*

> Price makes a statement about the offer. A premium-priced product carries a very different set of expectations than a parity-priced product. In some cases, price itself is the unmet need. Store brands emerged in the 1970s entirely on this premise. *(page 50)*

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To register, send an e-mail to contest@quirks.com with your complete contact information. Please include "SurveyGizmo Contest" in the subject line. Deadline to enter is May 31, 2010. The winner will be selected at random and announced in the July issue of *Quirk's*.

Congratulations to March's winner, Christopher Ratcliff of MarketVision Research, Fort Worth, Texas. The winner received a cash prize from The Sample Network.