QUIRK'S

Marketing Research Review

JUNE 2010

Marriott taps mobile research for quick feedback

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in case you missed it...

news and notes on marketing and research

Focus groups get Floridians involved in cracking cold cases

Over the course of history, research has been used in many strange-but-true situations, but perhaps none as creative as using it to solve crimes. Florida law enforcement officials took research far beyond taste-testing and live debate-watching when a grant from the Florida State Attorney's office brought homicide focus groups into the mix. No, not survivors of homicide victims or those convicted of homicide - these Floridian civilians were brought in for focus groups to team up with law enforcement officers across southwest Florida and spanning several different departments to crack cold cases, according to Meaghan Smith's April 19, 2010, piece "Homicide focus group working to crack cold cases," on NBC2.

The state grant allowed police and deputies from agencies like the Fort Myers Police Department, the Lee County Sheriff's Office, Cape Coral and others to work overtime and meet monthly to go through some of their coldest cold cases. In theory, the focus groups combine the various investigation techniques and strategies of officers from different departments together with civilian input to generate new ideas and new leads.

"A fresh set of eyes is very beneficial because they're seeing this on the outside looking in, where we're seeing it on the inside," said Sergeant Pete Tarman with the Fort Myers Police Department.

Two cases discussed in the meeting were those of Shannon Brown and Marshell Moreland, both found shot to death in Fort Myers in July of 2002, only a day apart. The focus group is committed to looking at cases over and over again until each mystery is solved.

Review-writing minority is heard widely in the hotel industry

While many consumers admit to relying heavily on peer reviews when buying a television or deciding on what movie to see, most probably aren't aware that said reviews are generated by a mere sliver of the population - with sentiments often skewing dramatically to the far ends of the satisfaction spectrum.

When booking hotels, for example, a study from Boston research company Chadwick Martin Bailey found that one in five people say online hotel guest reviews are the biggest influencer in deciding where to stay, yet the research also shows only 6 percent of guests have posted an online review of their hotel stay. That's a relatively small percentage of guests that are impacting the choices of 20 percent of the consumers researching a hotel.

In addition, the study demonstrates that the impact of a bad review on booking decisions is severe. Whether traveling for business or leisure, around two-thirds are less likely to book a hotel if it is given a one-star rating. Leisure guests are more influenced by top ratings; 92 percent of them (versus 83 percent of business travelers) are more likely to book a hotel if it receives a five-star rating.

"There's no doubt social media, online communities and customer review sites are giving travelers a platform to share their opinions and experiences, and these reviews, both positive and negative have a direct impact on the choices of consumers and the bottom line of hotels," said Judy Melanson, vice president of Chadwick Martin Bailey's travel and entertainment practice. "Individual hotels and corporate hotel brands need to keep a pulse on customer reviews. While recognizing they are powerful, online reviews are just one part of a larger overall online and offline customer engagement strategy."

While online guest reviews and opinions are making an impact and the rise of social media is only increasing the voice of the customer, the study found that for the most part customer recommendations are still happening the old-fashioned way, in person. Since their last hotel stay, close to half of consumers have recommended that hotel to a friend or colleague, and 88 percent have made those recommendations through in-person conversation.

Still, with such a small sample of online reviewers influencing 20 percent of potential guests and a majority passing along information face-to-face, hotels and review readers alike would be wise to keep in mind that one bellhop with a bad attitude or a few extra bottles of shampoo and a morning newspaper could make or break a review.

Drinking, smoking, sex - the more you say don't do it, the more they'll do it?

Anti- or "responsible" drinking campaigns have long been a mainstay of health departments, nonprofit organizations and even beverage companies, yet alcohol abuse remains a persistent and growing problem linked to the deaths of approximately 79,000 people in the U.S. each year. Could the advertising be to blame?

Unfortunately, research suggests it's possible, according to a study conducted by the Indiana University Kelley School of Business, Bloomington, Ind., and the Kellogg School of Management at Northwestern University, Evanston, Ill.

Public service advertising campaigns that use guilt or shame to warn against alcohol abuse can actually have the reverse effect, spurring increased drinking among target audiences. Instead of the intended outcome, research showed that the ads triggered an innate coping mechanism that enables viewers to distance themselves from the serious consequences of reckless drinking.

The research specifically explored anti-drinking ads that link to the possible adverse results of alcohol abuse, such as blackouts and car accidents, while eliciting feelings of shame and guilt. Findings show such messages are too difficult to process among viewers already experiencing these emotions, such as those who already have alcohol-related transgressions. To cope, they adopt a defensive mind-set that allows them to underestimate their susceptibility to the consequences highlighted in the ads; that is, that the consequences happen only to "other people." The result is they engage in greater amounts of irresponsible drinking.

The unintended negative impact of employing shame and guilt in these ads could have implications for a wider range of health-related messaging, from smoking cessation to preventing sexually-transmitted diseases. An alternative to this type of advertising is conveying dire consequences along with messages of empowerment.

"If you're going to communicate a frightening scenario, temper it with the idea that it's avoidable," said Adam Duhachek, an Indiana University marketing professor and co-author of the study. "It's best to use the carrot along with the stick."

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survey monitor

Corporate reputation on the rebound after bottoming out in 2008

After hitting rock bottom during the height of greed, bailouts and the economic crisis in 2008, the American public's perception of the reputation of corporate America seems to be bouncing back, according to Rochester, N.Y., research company Harris Interactive's 2009 RQ Study, which measures the reputations of the 60 most visible companies in the U.S.

The percentage of Americans who see the state of reputation as "not good" or "terrible" decreased from 88 percent in 2008 to 81 percent in 2009. Perhaps even more telling, there was a 50 percent increase in the number of Americans who said that the state of reputation is "good," moving from 12 percent to 18 percent. This is the first positive improvement in four years.

Six companies received an RQ score over 80, which is considered to be an excellent reputation, with Berkshire Hathaway taking the top spot from frequent top-scorer Johnson & Johnson by less than half a point. Rounding out the list of companies with excellent reputations are Google, 3M, SC Johnson and Intel. SC Johnson appears on the list of the 60 most visible companies for the first time, with the fifth-highest RQ score this year and is the first company since Google in 2005 to debut in the top five.

At the other end of the spectrum, AIG moved up one spot, ceding the lowest rating to Freddie Mac, another first-time company on the list. These two companies, along with Fannie Mae, received RQ scores below 50, which, over the past eight years of this study, has been a very strong indicator of a lack of future viability. Freddie Mac's score of 38.94 is the lowest recorded score since Enron's 30.05 in 2005.

Looking further at the bottom of the rankings, the nine lowest companies all have recently received government/bailout money or currently remain government-supported, including list newcomer Goldman Sachs, which joins the list with an RQ score of 51.36.

One of the true bright spots in the study belongs to Ford, whose RQ score increased by 11.28 points from 2008, the largest single-year improvement in the past nine years. Ford's score of 69.77 places it statistically in the category of companies with a good reputation, a tremendous accomplishment given its starting point and the state of the automotive industry.

At an industry level, technology remains the highest-rated industry, with a five-point increase from last year to a current 72 percent positive rating. The two largest reputation increases were in retail and automotive, both showing nine-point increases. The only industry to show a decline in reputation was pharmaceuticals, which displayed a two-point decrease following a five-point rise in 2008. Financial services and tobacco continue to hold the lowest industry rankings, however even financial services showed a five-point increase from last year.

The top 10 companies in order of ranking include: Berkshire Hathaway; Johnson & Johnson; Google; 3M Company; SC Johnson; Intel Corporation; Microsoft; The Coca-Cola Company; Amazon.com; and General Mills. The bottom 10 companies in order of ranking include: Delta Airlines; Bank of America; JP Morgan Chase; General Motors; Chrysler; Goldman Sachs; Citigroup; Fannie Mae; AIG; and Freddie Mac. For more information visit www.harrisinteractive.com.

Chronic-disease sufferers use social media to learn, share

U.S. adults living with chronic disease are significantly less likely than healthy adults to use the Internet (62 percent vs. 81 percent), according to Chronic Disease and the Internet, a report from the Pew Internet Project, a Washington, D.C., research division. However, lack of Internet access, not lack of interest in the topic, is the primary reason for the difference. Once online, having a chronic disease increases the probability that someone will take advantage of social media to share what they know and learn from their peers.

The Internet access gap creates an online health information gap. More than any other group, people living with chronic disease remain strongly connected to offline sources of medical assistance and advice such as health professionals, friends, family and books. However, once they have Internet access, people living with chronic disease report significant benefits from health resources found online. When other demographic factors are held constant, having a chronic disease significantly increases an Internet user's likelihood to say they keep a blog or contribute to online discussions, a listserv or other online group forums that help people with personal issues or health problems.

Living with chronic disease is also

continued on p. 67

names of note

James R. Beniger, former president of the *American Association for Public Opinion Research*, Deerfield, Ill., died on April 14, 2010, at age 63.

Elisabeth Noelle-Neumann, founder of *Allensbach Institute*, an Allensbach, Germany, research firm, died on March 25, 2010, at age 93.

ROI Labs, a New York research company, has named **Michael Hayward** CEO.

Rochester, N.Y., research company *Harris Interactive* has appointed **Peter Shreeve** as senior consultant, U.K. financial services research.

Milwaukee research company *Market Probe* has named **Viraag Agnihotri** managing director, operations, India and Middle East/Africa.

Eric R. Kandel has joined the advisory board of Berkeley, Calif., research company *NeuroFocus*.

Amy Henry has been named vice president, youth insights, of *C&R Research*, Chicago. Henry will lead the firm's YouthBeath division.

Mark Stapylton has been appointed managing partner of *PluggedIN*, a Rochester, N.Y., research company.

Stamford, Conn., research company *InsightExpress* has promoted **Dan Campbell** to vice president and **Lauren Benedict** to senior director of its digital media measurement division. The division has also added **Karen Joyce** as senior account executive.

Vancouver, B.C., research company *Vision Critical* has named **Steven Davis** director, product innovation. The company has also made two promotions within its retail practice: **Janet Lazaris** to executive vice president and **Dara St. Louis** to senior vice president.

Separately, Vision Critical's *Angus Reid Public Opinion* division appointed its U.K. general election team: **Angus Reid**; **Laura Davies**, senior vice president, panel strategy; **Andy Morris**, director, research, U.K. practice; **Hamish Marshall**, director, research; and **Mario Canseco**, vice president.

New York research company *Ipsos Marketing* has hired **Donna Wydra** as senior vice president, shopper insight.

Michelle Poris has joined Johnson City, Tenn., research company *Smarty Pants* as a senior research director. Poris will be based in Stamford, Conn.

Poris Miller

Scott Miller has been named CEO, North America, of Chicago research company *Synovate*. Additionally, **Richard Abraham** has been appointed head of the public sector, charities and transport industry sector team at Synovate's U.K. operation.

Cincinnati research company *Burke, Inc.* has promoted **Andrew Bernard** and **Rachel Peck** to vice president and **Michael Pietrangelo** to senior vice president.

Atlanta research company *CMI* has hired **JD Woods** to its client services team; **Alisa Hamilton** as senior project manager; and **Matt Orenstein** and **Nicole Stover** as associate project manager.

Alan Chumley has joined Washington, D.C., research company *CARMA International* as senior measurement consultant.

Yahoo! Maktoob Research, Dubai, United Arab Emirates, has hired **Ragheed A. Masri** as head of operations in the Amman, Jordan, office.

Cincinnati research firm *LoyaltyOne Consulting* has promoted **Dennis Armbruster** to vice president and hired **Sol Zia** as senior director, consulting; **Richard Schenker** as senior director, consulting; **Ken Kuschei** as consultant; and **Allan Toy** as business intelligence analyst.

Shelton, Conn., research company *Survey Sampling International* has named **Rene Bos** managing director, Asia-Pacific.

Dan Gersten has been hired as account director, financial services, at Boston research company *Chadwick Martin Bailey*.

Fresno, Calif., research company *Decipher* has hired **Bonnie Sherman** as vice president, custom panel development. Sherman will be based in Sacramento, Calif. **John Saez** has been named director, sample management, and will be based in Norwalk, Conn.

The Solar Energy Industries Association, Washington, D.C., has hired **Thomas P. Kimbis** as director, policy and research, and general counsel.

InterMedia, a Washington, D.C., research company, has named **Gerry Power** as managing director of its U.K.-based subsidiary.

London research company *GfK NOP* has named **Andreas Guhl** director, market access center.

David Lemelin has joined *ABI Research*, Oyster Bay, N.Y., as director, research, enterprise communications. **Victoria Fodale** has also joined ABI as senior analyst, mobile devices.

London research company *GfK Roper Consulting* has named **Joe Staton** director, global consumer trends.

product and service update

New segmentation system to explore the mobile consumer

New York research company Experian Simmons has released a mobile consumer segmentation system and three mobile psychographic scales designed to examine the behaviors and attitudes of mobile consumers. The five mobile consumer segments available are Mobiriati (19 percent of mobile phone owners), who represent the first generation to have grown up with mobile phones and for whom mobile phones are a central part of their daily life and they cannot imagine life without them; Social Connectors (22 percent), who use mobile phones to keep up-to-date with friends and social events; Pragmatic Adopters (22 percent), a group in the early stages of realizing that there's more that they can do with their phone besides phone calls; Mobile Professionals (17 percent), who are busy and use mobile phones - often smartphones - to keep up with work and family life; and Basic Planners (20 percent), for whom technology, including mobile phones, is not of much interest and for whom basic mobile packages serve all their needs.

The three mobile consumer psychographic scales are as follows:

Switching Propensity: This factor measures mobile consumers' willingness to switch service providers for a variety of reasons, including improved quality, plan selection and technology.

Feature Focus: This factor measures the propensity of mobile consumers to place value on new mobile features and technology versus traditional calling functions.

Traditional Use: Mobile consumers who score above average on this scale would prefer to use a landline phone over their mobile and also lean toward having only a basic calling plan.

The offerings are available to all clients in the latest release of the Simmons National Consumer Study/National Hispanic Consumer Study. For more information visit www.experiansimmons.com.

Mob4Hire updates mobile crowd-sourcing platform

Mob4Hire, a Calgary, Canada, research company, has released version 4.0 of its platform, which aims to use Mob4Hire's crowd of 40,000+ mobile users in 150 countries to offer mobile functional and usability testing, as well as product and market research. Mob4Hire Version 4.0 includes four crowd-sourced products: MobTest, functional and usability testing for mobile apps; MobSurvey, surveying mobile enthusiasts; MobExperience, customer loyalty research and usability testing before developers release mobile apps; and MobAccelerator, customer loyalty research coupled with in-store user experience, discoverability and marketing research.

Mob4Hire has also introduced basic, premium and managed service pricing tiers. For more information visit www.mob4hire.com.

Infogroup solutions go social

Omaha, Neb., research company Infogroup has expanded its marketing solutions to include social media and interactive products and services for small, medium and enterprise businesses. The addition aims to create an unparalleled ability for direct marketers to find, attract, engage and retain customers through online and offline marketing channels. Infogroup's suite of social media products includes social media listening and monitoring; social media data append; social media strategic consulting; social media setup on sites like Twitter, Facebook, Flickr or YouTube; and other interactive marketing activities solutions, such as Twitter campaign management, online social communities and iPhone and widget application development.

Additionally, Infogroup will offer single- and multi-page customized site development via microsites and landing pages, including a product called SMASH. SMASH is designed to allow people to experience an event or be engaged in a topic remotely. For more information visit www.infogroup.com.

GfK Panel Services expands to measure TV ad reach

GfK Panel Services Germany, a Nuremberg, Germany, research company, has expanded its Web Efficiency Panel to include electronic monitoring of TV advertising campaign reach. To measure TV campaign reach, GfK Panel Services has supplied its panel members with modified mobile phones, which record exposure to TV advertising through sound recognition. Individuals activate the GfK-modified mobile phone when they are watching television, and the phone is designed to be able to recognize from the sound which advertisement is being viewed. The recorded data is then transmitted via the phone's network. Using statistical transmission information from Thomson Media Control, GfK is able to determine the television program during which the panel member was exposed to a specific advertisement. For more information visit www.gfk.com.

TNS explores consumer tracking with three-S model

Horsham, Pa., research company TNS has proposed a consumer tracking model based on three S's: See, Seek and Say. The See component is based on brand-generated media, while Seek is focused on the interactions between the brands and target audience. The Say component has shifted power to buyers through consumer-generated media, which can take the form of traditional word of mouth, blogs, Internet postings, etc., and allows buyers to share their

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research industry news

Calendar of Events has moved to page 74

News notes

Columbia, Md., research company **Arbitron Inc.** and the **PPM Coalition** (PPMC) have settled their outstanding disputes. Arbitron and the PPMC have worked jointly with the Media Rating Council (MRC), New York, to implement a series of steps designed to enhance the recruitment methodology of the Arbitron Portable People Meter (PPM) ratings service. The initiatives include the addition of targeted in-person recruitment to Arbitron's PPM panelist recruitment approach, which currently includes mailings and phone calls. Arbitron will also use address-based sampling to select landline households. The approach is scheduled to begin in July 2010.

The Federal Trade Commission (FTC), Washington, D.C., is seeking public comment on the costs and benefits of the **Children's Online Privacy Protection Act (COPPA) Rule**, designed to protect children online. The comment period will end on June 30, 2010. Interested parties can submit written comments electronically or in paper form. Comments in electronic form should be submitted using the following Web link https://public.commentworks.com/ftc/2010copparulereview. Comments in paper form should be mailed or delivered to: Federal Trade Commission, Office of the Secretary, Room H-135 (Annex E), 600 Pennsylvania Ave. N.W., Washington, D.C., 20580.

Los Angeles research company **OTX** has sued Kevin Goetz, former president of the worldwide motion picture group, for allegedly using OTX's data to launch a rival firm. Goetz left OTX in February 2010 to launch Screen Engine LLC, Beverly Hills, Calif. The suit accuses Goetz of breach of contract, misappropriation of trade secrets and intentional interference with contractual relations, among other alleged offenses.

Article submissions are being sought for a new marketing research book. **Sage Publishing**, a Thousand Oaks, Calif., research publishing house, has commissioned *Leading Edge Marketing Research: 21st Century Tools and Practices*, to be offered in 2011. Editors Bob Kaden, Gerry Linda and Mel Prince are inviting 6,500-10,000-word articles by industry experts. Expression of interest must be received by June 15, 2010. Authors will be selected by August 1, 2010, and final drafts are due December 31, 2010. Submissions should be written in English and submitted as Word documents to info@leadingedgemarketingresearch.com.

Orem, Utah, research company **Western Wats** has paid $500,000 in civil penalties in response to child-labor violations cited by the U.S. Department of Labor. Violations included employing children too young to work and allowing children to work longer hours than allowed by law. The fine was paid in December 2009 and is accompanied by a full remediation plan.

Omaha, Neb., research company **Infogroup**'s former CFO Stormy Dean has rejected a settlement with the U.S. Securities and Exchange Commission regarding a law suit filed for approximately $1.15 million for severance and bonuses Dean claims the company has refused to pay following his termination in October 2009.

Leeds, U.K., research company **Nunwood** has rebranded with a new look and slogan - "Insights, Analytics, Activation."

Chicago research company **Information Resources Inc.** has changed its name and rebranded as **SymphonyIRI Group Inc.** The firm is online at www.symphonyiri.com.

Baltimore research company **Observation Baltimore** has constructed a new green building to serve as its headquarters and implemented a green initiative, which includes workplace policies designed to reduce the company's environmental impact.

Minnesota Governor Tim Pawlenty has signed a bill into law that legalizes exit polling at Minnesota voting places. **The Marketing Research Association**, Glastonbury, Conn., had previously testified in support of the law in the state legislature.

Cincinnati research company **Colloquy** has redesigned its Web site www.colloquy.com. The site includes a resource center and blog (http://blog.colloquy.com).

Acquisitions/transactions

Leeds, U.K., research company **Nunwood** has acquired fellow Leeds research company **The David Conway Consultancy**. The David Conway Consultancy will merge with Nunwood, and David Conway will serve as strategy director and join the Nunwood board.

Alliances/strategic partnerships

Horsham, Pa., research company **TNS and Research** and

continued on p. 72


Automation
E-Tabs
E-Tabs

By Carey V. Azzara

The focus group vs. in-depth interview debate

If debate is healthy, you might describe the debate over qualitative methods as positively athletic. There are plenty of opinions regarding which qualitative approach provides the best results. You, no doubt, have your own opinion.

To explore the reasons professionals feel strongly about the merits of focus groups (FGs) versus in-depth interviews (IDIs), we asked 20 of them when and why they choose to use FGs versus IDIs. The themes that emerged from our asynchronous debate process are illuminating.

In general, there were three, somewhat predictable, positions: one-on-one interviews are superior to focus groups; focus groups are superior to one-on-one interviews; align the research approach with the research objectives.

Each person who took one of the first two positions gave well-thought-out reasons for his or her choice. It typically related to the specific research problem they faced. Another reason for a preference was skill. Practicing what you know how to do best makes sense. Many professionals are better at one approach than another; this factor obviously plays a role in the choices practitioners make.

Aligning the approach with the objectives was an overarching theme even among professionals who strongly favor one technique over the other. Thus, our next questions are, what are the "when and why" answers experts gave? And, can we create a concise best-practice statement from the collective wisdom of 20 practitioners?

snapshot

The author consulted 20 qualitative researchers to get their answer to the age-old question: Which is better, the focus group or the IDI? The answer, of course, is: it depends.

Editor's note: Carey V. Azzara is founder and principal of AtHeath, a Newton, Mass, research firm. He can be reached at 508-400-6837 or at carey.azzara@atheath.com. To view this article online, enter article ID 20100601 at quirks.com/articles.

Arguments for in-depth interviews

IDIs provide the best opportunity to explore decisions and compare differences and similarities among reference group members. When the research objective is to understand individual decision processes or individual responses to marketing stimuli (e.g., Web sites) IDIs are typically the choice. IDIs allow detailed exploration of a single respondent's reactions without contamination. They are particularly valuable when researchers want individual reactions placed in the context of the individual's experiences.

A preference for IDIs is likely

when group interactions are unimportant or detrimental. A few scenarios are:

- when it is easier to reach target respondents with IDIs;
- when there is a better cost-benefit for IDIs;
- when it is preferable to collect responses without the group influence factor;
- when probing and/or laddering techniques are part of the data collection process;
- when project objectives require a direct correspondence of specific findings to specific respondent segments; and/or
- when a device or process is being tested for usability.

Additionally, if the topic is highly sensitive (e.g., serious illnesses) use of IDIs is indicated. Subjects which are highly personal (e.g., bankruptcy) or very detailed (e.g., divorce decrees) are best probed deeply with IDIs.

Sensitive subjects are also a factor in business research. Topics with competitive consequences are sensitive areas (for example, companies consider information-technology practices proprietary, especially security technology). In addition, businesses are wary of participating in FGs with competitors (such as when participants are from the same vertical industry, etc.).

A preference for IDIs was evident when:

- working with small populations, especially if geographically-dispersed;
- avoiding operational pitfalls is a concern (e.g., the threat of 60 percent of a group cancelling or possibly inviting the wrong people; it's easier to recover from one bad-fit IDI than a FG with eight people); and
- you need deep layers of information from probing (e.g., interviewing "experts").

In the final analysis IDIs are a practical approach and typically easier to manage. However, it's important to distinguish between the ease-of-use factor versus the better-approach factor!

Arguments for focus groups

Several versions of the following comment were typical: "My rule of thumb is to assume focus groups and switch to IDIs only if necessary." A basic question is, "Will the group dynamics add to the findings?"

There are triggers to suggest when to do groups versus using other qualitative approaches. FGs are particularly compelling:

- when consensus or debate is required to explore disparate views;
- to generate opportunities for point-counterpoint discussion and resolution;
- as an excellent approach for broad, exploratory topics, and as a mechanism for helping people generate and share their ideas;
- when the interaction between the participants sparks a discussion that illuminates a topic, draws out latent issues;
- when you want people to work in teams;
- when the rich quality of respondent

interactions is needed or you are exploring common trends; and/or

- when you are early in the exploration of a concept or topic, as group dynamics are powerful in the discovery process.

Focus groups have an advantage when trying to engage clients (decision-makers) in the research process. When research sponsors take time to view focus groups it expedites their buy-in, moving the study to final recommendations faster. You are less likely to "lose" your client in the course of two or four hours compared to the time associated with IDIs. For some practitioners focus groups were preferred when speed is important, but apply caution here: advocates of IDIs use this argument too. FG practitioners believe IDIs take longer to execute than FGs and are harder and more time-consuming to analyze.

Focus groups of no more than eight respondents was a recommendation echoed by several practitioners. Triads and mini-groups were suggested as alternatives for generating ideas while allowing in-depth questioning. Mini-groups are well-suited to obtaining reactions to product stimuli and generating refinements. Contrary to most opinions, sensitive issues are not only okay in groups, but may be explored as well as or better than in IDIs, because respondents engage when discussing their condition or issue with others in the same boat.

Finally, the statement, "I favor the group situation; people are forthcoming among peers when attention is focused on many rather than one," depicts a popular position.

Two themes

Two themes emerged that we can use to construct a best-practice statement. The first is characterized by the mantra, "Objectives drive design." Evaluate critically the research objectives and apply the approach most likely to provide insights. A good practitioner chooses the best method for the work and the selection process requires understanding the merits of all available approaches.

A key question is whether the objectives are individual in nature (e.g., decisions, preferences, usability) or group-oriented and benefit from participants' discussion or perhaps arguments (e.g., concept exploration).

The second theme is summarized by the simple comment, "Why not use both?" Designing qualitative research using IDIs and FGs provides the best of both worlds - and it's not a cop-out! IDIs provide depth of questioning and personal information while FGs help us understand the social context of issues. The methods are complementary.

For business decision makers, combining the benefits of IDIs and FGs is a great solution if the budget supports it. In fact, perhaps the only real argument against this approach is concern about exceeding a project's budget. | Q

Save your IDIs from the Digressor

Doing some IDIs? Enter article ID 20081202 at www.quirks.com/articles to learn how to deal with a host of problem IDI respondent types.

> data use

By Erik Coats, Cristina Ilangakoon and Michael Feehan

Improve confidence in findings with strength-of-conviction metric

Two of the most ubiquitous question batteries in quantitative market research are those in which a list of attributes are rated on 1) their importance in buying decisions, and 2) strength of association with any specific brands. The value of these questions is obvious, and indeed it would be difficult to exaggerate their importance to marketers. They provide a picture of the critical needs of potential consumers and how a brand's value proposition stands on its ability to fulfill those needs relative to competitors. Because these questions work together to provide this important picture, they are often referred to collectively as an influential attribute assessment (or IAA).

Traditional IAA approaches hinge on consumers making effective judgments on how strongly a brand performs on any single attribute. However this two-dimensional picture (association and importance) is vulnerable in situations where consumers do not have full knowledge of the product or attribute under consideration. This is especially true when new products are considered, but even with well-established brands customers frequently have gaps in their knowledge and perceptions. We argue that the two-dimensional IAA approach can be improved by simultaneously including a third dimension – a measure we call strength of conviction.

snapshot

When constructing an influential attribute assessment, adding a strength-of-conviction metric can help quantify the respondent's degree of certainty so that it can be controlled for and used to clarify the picture of brand performance.

Editor's note: Erik Coats is executive vice president, Cristina Ilangakoon is senior associate and Michael Feehan is CEO at Waltham, Mass., research company Observant LLC. Coats can be reached at 781-642-0644 or at ecoats@observant.biz. Ilangakoon can be reached at cilangak@gmail.com. Feehan can be reached at mfeehan@observant.biz. To view this article online, enter article ID 20100602 at quirks.com/articles.

The degree of confidence

Strength of conviction (or SoC) is the measurement of the degree of confidence a consumer has in their rating of a brand association. Asking about strength of conviction is akin to asking, "How sure are you?" For example, a consumer may feel extremely confident that an Apple iPhone has some desired quality, such as having a highly-scratch-resistant screen. However, asking about Google's forthcoming smartphone Dragon may be more challenging. They may assume the Dragon probably has the same screen quality but would be less sure. SoC quantifies

this degree of certainty so that it can be controlled for and used to improve the picture of brand performance. In other words, adding SoC can change a two-dimensional view into a more complete three-dimensional picture.

So how much does SoC really matter? Potentially quite a bit. Those who've conducted IAA in the past have probably already noticed weaknesses in the quality of data and inferences resulting from uncertain responding.

Always a continuum

In designing a quantitative survey, before asking consumers for brand ratings we must first decide whether or not we wish to allow a "don't know" option. Allowing "don't know" recognizes that consumers may have such a low degree of conviction that they should be allowed to give no answer at all. But this dichotomous view of SoC is too simplistic: something people either have or don't. In reality, SoC is always a continuum.

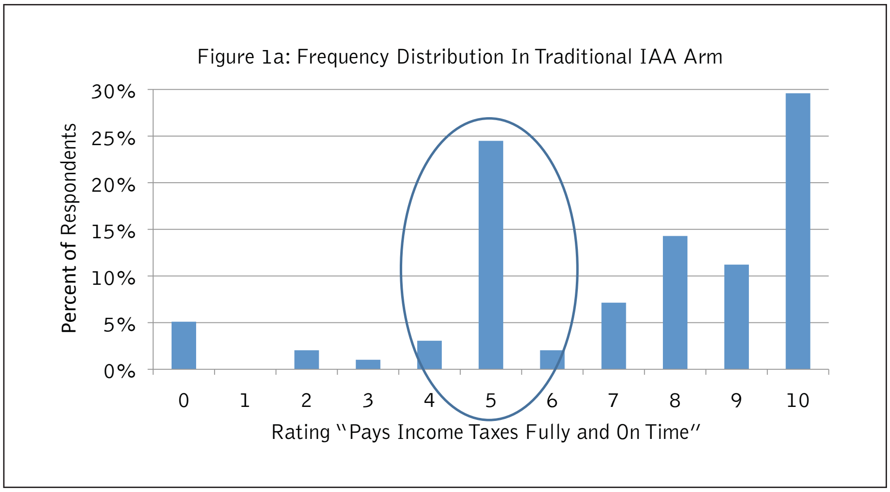
Without SoC market researchers must decide between two imperfect options. Allowing "don't know" has at least three important drawbacks. First, it allows less-diligent consumers an easy out by allowing them to essentially avoid the question. Second, it complicates analysis by permitting missing data. And third, we fail to collect data on beliefs that are weakly held but may nevertheless affect behaviors of interest.

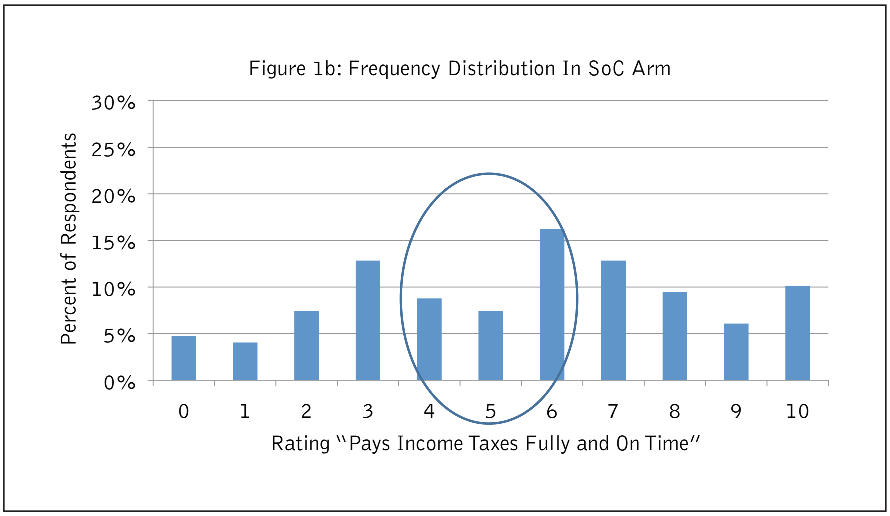
Yet disallowing "don't know" has its own pitfalls. It may frustrate consumers who don't know how to rate all products on all attributes and create error in our data by forcing a response when no appropriate one is available. This error in the data is perhaps most obvious in the midpoint spike.

It is not uncommon when viewing a frequency distribution of a product-associate question to notice a spike at the midpoint in the scale (e.g., 5 on a 10-point scale). Quite often the frequency at the midpoint is greater than either side of the midpoint.

It's likely (and widely suspected) that this midpoint spike reflects people with low SoC who didn't know what answer to give. Having been denied a "don't know" option, they may decide the middle answer is the safest choice. This would not be a problem if all midpoint answers reflected low SoC and if all people with low SoC gave an answer at the midpoint of the scale; but neither of these is true. Some people use the midpoint because that is their honest assessment. Moreover, some people with low SoC give an answer at the bottom or top of the scale – spiking the tails of the distribution.

In short, without a separate SoC measure, brand-associations and SoC are mixed together. The problem is likely not limited to the midpoint spike; it's likely that SoC serves to pull many responses closer to the midpoint. For example, a person who believes a certain brand probably deserves a score of 9 may instead give it an 8 if they have moderate conviction about their answer, or even a 7 if they have less conviction. Without specifically addressing SoC in the questionnaire design there is no way to analytically untangle this muddling of product association and degree of certainty.





Self-funded study

To evaluate the potential advantages of incorporating SoC into IAAs, Observant LLC conducted a self-funded study to develop and evaluate an online questionnaire method of assessing SoC in a brand-association context. The respondents were 400 adults recruited from a general U.S. population panel. The topic of the research was understanding the importance of various characteristics about primary care physicians (PCPs) in driving their satisfaction and likelihood to continue going to him or her.

The product attributes for the IAA were 30 characteristics of PCPs. Each consumer first rated the importance that a doctor should have each of the 30 attributes. They were then randomly assigned to one of two conditions: 1) traditional IAA, or 2) IAA with SoC.

Those assigned to the traditional IAA arm rated their PCP on each of the 30 attributes in a typical format, on a 1-10 scale from "Does not Describe at All" to "Describes Completely."

Those in the SoC condition provided data on both association and strength of conviction in a single operation. This was achieved using an interactive graphical drag-and-drop questionnaire format. It has been argued that interactive methods such as drag-and-drop improve the quality of both data collection and consumer experience (see "More satisfying satisfaction research," *Quirk's*, July 2009). In our study, consumers were shown a single attribute on a screen and asked to select one of five color-coded markers to indicate their level of conviction in their response (from 5 - "Highly Confident" [bright green] to 1 - "Not at all Confident" [dark red]). They then dragged that marker onto the association 1-10 scale at the point that indicated their association. This one-step process to measure two dimensions simultaneously was then repeated for all other attributes. We initially verified that attributes do in fact vary with respect to strength of conviction. Top-2 box SoC (confident or extremely confident) ranged from a high of 91 percent ("has a clean and comfortable waiting and exam room" and "office staff is friendly and helpful") to a low of 54 percent ("runs an environmentally-clean practice").

We then looked to see whether including SoC eliminated the mid-

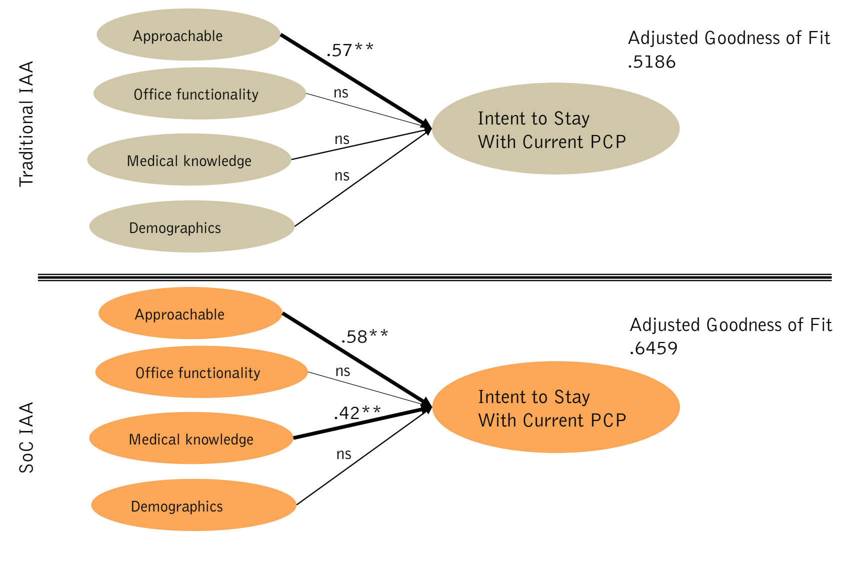


Figure 2: SEMs Based on Traditional and SoC Arms

point spike. Figure 1a shows the frequency distribution of the attribute "pays income taxes fully and on time" in the traditional IAA arm; whereas Figure 1b shows the distribution for the same attribute in the SoC arm. As expected, the midpoint spike is observed for the traditional method but not the SoC method.

Predict consumer behavior

The most important test of the utility of including SoC is exploring whether it improves our ability to predict consumer behavior. To test the hypothesis that SoC would provide manifestly different interpretations, we asked all respondents to answer questions about their satisfaction with their doctor and the likelihood that they would switch to a new PCP in the near future. Attribute ratings were then used to predict their intent to stay with or change their doctors using structural equation modeling (SEM).

Comparing SEM models based on the control condition with those of the SoC condition clearly demonstrate the superiority of the SoC approach. As can be seen in Figure 2, in the traditional arm only the factor of "approachability" significantly predicted "intend to stay." In the SoC arm, both "approachability" and "medical knowledge" significantly predict "intend to stay." It is perhaps not surprising that SoC improved predictive ability for "medical knowledge," as this is an area where there is greater variability in people's level of conviction about their ratings.

The SoC approach also performs significantly better on objective goodness-of-fit indices. The overall adjusted goodness-of-fit index is .6459 for the SoC arm but only .5186 for the traditional arm. This confirms that the data collected using SoC are superior in their ability to predict relevant behavioral intentions.

Improves our ability

The advantages of SoC are no mere academic exercise. Adding SoC to a traditional IAA task improves our ability to predict future customer behavior. In our example, we could envisage a program being developed to improve physician perceptions among their patients (and thereby enhance medication adherence with improved public health outcomes). Without considering SoC, such a program would miss the boat and prioritize only one key dimension. With more accurate SoC data, the program would correctly target two aspects of physicians' practices to improve. By measuring the confidence our respondents have in their answers, we market researchers can improve our own confidence in the insights we deliver to our clients through improved IAA. | Q

> mobile research

By Joseph Rydholm

Maximizing those mobile moments

How Marriott International tapped mobile research to get feedback on enhancements to its mobile site

If your goal is to conduct research with on-the-go people, what better way than with mobile research? That was part of the thinking behind Marriott International's decision to conduct a mobile-based study with users of Marriott Mobile, the mobile version of the Marriott Web site.

Marriott Mobile debuted in August 2008 and was a smash hit, generating $2 million in gross revenues by the end of that year. Wanting to keep pace with technology and with travelers' evolving needs, Marriott sought to add new features in 2009 and so turned to research firm Vision Critical for help with developing a mobile survey. "We wanted a quick way to determine what our mobile customers are looking for, which is precisely what the [mobile survey] allowed us to do," says Gina Villavicencio, senior manager, user research, Marriott International - eCommerce. "The survey enabled us to speak to 700 mobile users in roughly 30 days and very quickly get insight into today's mobile customers."

The brief questionnaire included some general-impression questions, some usage pattern questions and also queried about a city guide feature which offered information on restaurants and other attractions in cities with Marriott hotels. "We wanted to understand how our mobile users would respond to the launch," says Villavicencio. "The feedback was overwhelmingly positive. In fact, we also benefited from a halo effect where those who clicked on the city guide link rated the mobile experience higher."

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snapshot

Shared expectations and awareness of the technique's strengths and weaknesses helped Marriott get the most out of a mobile survey of users of its Marriott Mobile site. The results augmented data gathered from a host of other sources to give a fuller look at the user experience.

Marriott had a wealth of data from other research approaches on the mobile site - online surveys, secondary data, etc. - but to get feedback on the mobile site it made sense to use a mobile-based survey approach, Villavicencio says. There was some prior experience with a mobile-based survey, thanks to a previous ad-effectiveness test, so the researchers knew at the outset what they could and couldn't do, and what kind of information they could expect to garner, using the mobile survey approach. "We knew there were some limitations, including survey length and question type. We had one open-ended question but we knew it wouldn't yield much information."

While mobile surveying has a number of applications, it is obviously well-suited to researching the frequent business travelers, says Chris Ferneyhough, senior vice president of Vision Critical's technology practice. "When you think about a scenario when the respondent is the mobile professional, someone who is constantly at the airport and staying in hotels, their down time sitting at the airport gate is often spent on their BlackBerry or their iPhone and there is an opportunity to hit them with surveys to measure their satisfaction with their most recent flight or hotel stay.

"In a lot of these cases, you are able to catch the respondent in the moment, once they get off the plane or when they leave a store, as opposed to having to contact them two weeks later, and ask them about that flight or that experience in the store or that hotel stay," he says.

That immediacy makes up for any concerns about the need to be brief, Villavicencio says. "One of the benefits of [the mobile survey approach] is immediacy. Because you get the respondent right there, when they are using it, while they are going through the experience, the quality of the data is richer and more accurate. The drawback is the inability to ask several questions or probe. However, if you have a specific topic or objective, the way that we did, a mobile survey is ideal."

Response rates were very good

While no incentive was offered to respondents, response rates were very good, which was likely a result of customers' loyalty to Marriott, Villavicencio says. "They tend to respond to our surveys very well. Plus, taking a mobile survey is still a novelty and the invitation to do so probably piqued their curiosity."

Beyond incentives, it is crucial to make sure that prospective

respondents have an unlimited data plan through their mobile service and therefore won't have to pay to respond to your survey. Paying to do something they expect to be compensated for in some way, even if that compensation only takes the form of a chance in a prize draw, not only damages the respondent's view of the research process but also makes it more likely they will choose not to respond. "Cost to the respondent has been a point of contention," says Gordon McNeill, vice president of product innovation at Vision Critical. "In North America we are getting better at having unlimited data plans, but it is something to be aware of and understand that you are more likely to get a response from someone with an unlimited data plan than someone who has to pay to respond to your survey."

Villavicencio says that Marriott expected most of the respondents would complete the survey while they were on the road or on the go but a surprising one-third took the survey while at home. "That speaks to the adoption of mobile. It was interesting to learn that a person who is at home would choose to take a survey on their mobile device," she says.

The location factor is one that Vision Critical has been examining in some of its research on research, says McNeill. "One of the questions we have been adding to our mobile projects is, where are you right now? Are you in a car? At the airport? We want to start to combine those kinds of numbers from across our surveys to see if we are capturing respondents at different times than we are capturing them when they complete a survey on their computer."

Going forward, those kinds of questions may be moot, as GPS and other location-pinpointing technologies become standard in smartphones, McNeill says. "It's getting to the point where you don't have to ask someone where they are located - you can capture that from the device if they give you permission. Thus you can shorten up the survey because you don't have to ask those questions but you get that rich data."

Paint a clearer picture

One of the main reasons to do the Marriott Mobile survey was to be able to link it to Web analytics data to paint a clearer picture, Villavicencio says. "In the past, we measured improvements to

Quick suggestions for those considering going mobile:

- **Keep it brief.** Short and sweet is the strategy for both the questionnaire in total and the questions themselves. "In these mobile moments, as we call them, you don't have a lot of time so you want to make sure you get them through the survey quite quickly," Vision Critical's Gordon McNeill says.

- **Keep it simple.** Remember that there are thousands of models of smartphones on the market, and to make a survey appear in roughly the same way on all of those phones, things need to be kept simple. Colors can display differently on different phones, questions can wrap differently depending on screen size, etc.

  Not only does this maintain respondent satisfaction by showing respect for their time but it also compensates for the effects of mobile phones' small screens and the myriad types of phones that the survey must appear on. For example, overlong questions can break in odd ways and you want to keep respondents' scrolling to a minimum. "The way that a longer question would show up on an iPhone will be dramatically different than on a BlackBerry Pearl. The more scrolling a respondent has to do, the more frustrating the experience. So the shorter you can keep the questions, and the fewer response options you offer, the better," Vision Critical's Chris Ferneyhough says.

- **When possible, know your respondent.** "We have profiled our panelists to make sure they are willing to complete surveys and to find out what type of device they are using. You have to respect the fact that there may be respondents who don't want to complete surveys on their mobile device or might be intimidated by doing so," Ferneyhough says.

- **Make sure respondents are completing mobile surveys on their mobile phones.** "There is a chance that they could get the invite via e-mail and then they go and complete it on their computer and of course things look very different," Ferneyhough says, which could affect their impression of the survey process.

Marriott.com using behavioral or Web analytics data and attitudinal or survey data. The mobile survey allowed us to do the same for Marriott Mobile."

For Marriott, it also helped that the various internal teams had discussed their shared expectations and objectives going into the research, so there were no surprises or disappointments as the data came in, Villavicencio says. "I think that when trying new tools, or new approaches, it's always good for the client teams to go in completely in synch."

Grow rapidly

Ferneyhough feels that use of mobile research will continue to grow rapidly. "I think it's an important area and I'll be surprised if five years from now at least a third of the data that is being collected isn't being done this way. The phone makers themselves are doing a great job of driving people to these devices and getting them to change their Web behavior. More and more companies are recognizing the importance of the platform and getting a better understanding of the platform and definitely it is the most exciting aspect of where research is going."

While mobile research shows a lot of promise as a new and exciting technique, that very newness means that things won't always go smoothly, Ferneyhough says. "We are still so early in this methodology that there will be a lot of hiccups along the way. We as researchers are going to have to learn as we go, and we will unfortunately learn things the hard way. I would almost make a parallel to the early days of the Web research in the late '90s, where [with mobile research] you are getting the opinions of a select group of respondents who are comfortable using their technology and spend a lot of time using it and as a result are not terribly representative in all likelihood of the target market. The good thing is, many of those issues are going to go away as penetration levels keep rising, just as the same types of arguments related to the Internet have by and large gone away."

While mobile research is new and different, it has to be used properly to avoid making its use more than just a reaction to the need to try the latest thing. "It really comes down to, what is the type of person that you need to collect this data from, how representative are smartphone users among this type of respondent and what is the category?" says Ferneyhough.

Complements rather than replaces

For Marriott, Villavicencio says that while the mobile research experience was satisfying and helpful, the method will be viewed as one that complements rather than replaces its existing research approaches. "We have a host of different tools such as Web analytics and the online research panel hosted by Vision Critical. The mobile approach is definitely another tool we plan to use in the future." | Q

> pharmaceutical/health care research

By Cindy Bean

Where can we make a difference?

Seeking to enter a crowded market, a pharmaceutical company used research to understand the needs of osteoporosis sufferers

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snapshot

In-depth qualitative with patients helped determine how to position a new brand in the osteoporosis category by uncovering the emotional issues underlying the seeking of treatment and living with the effects of prescription medicines.

In a competitive and well-established therapeutic category, carving out a unique space for a new brand is challenging, as one pharmaceutical company discovered when trying to launch a new brand into the osteoporosis market. After many months of research with health care providers (HCPs), the company concluded that it would be unlikely to change current first-line prescribing behavior at the physician level. So it decided to explore a consumer-driven branding effort. But, the company wondered, was there a consumer segment in which it could really make a difference?

Previous qualitative research had already segmented the market into four primary patient-user groups. Determining if one or more of these segments would be receptive to this new product would require an in-depth understanding of not just the current drivers of and barriers to treatment for each segment but of their attitudes toward the disease and toward their physicians.

The team embarked on a two-phase exploratory research plan, grounded in consumer insights, followed by a messaging check with health care providers.

Phase 1: Understanding the attitudinal and behavioral drivers of the osteoporosis patient

The first phase involved a combination of individual interviews and small-group discussions with patients in each segment, utilizing multiple creative methodologies. The primary objective of this phase was to create a detailed profile of the typical patient in each of these segments, with emphasis on their attitudinal and behavioral drivers. The hope was that these in-depth segmental profiles would reveal the greatest opportunities for this new product and then help the company understand what messages would resonate with that/those audience(s).

Patient-user segments determined by prior research:

The current satisfied user - those who are currently taking and are happy with their osteoporosis medication. They have adapted to its administration requirements and experience no side effects.

The current dissatisfied user - those who are currently taking but are not happy with their osteoporosis medication. They experience some side effects, have not adapted well to its administration requirements and are not convinced of its efficacy due to not "feeling better"/having to wait for their next DXA scan. They feel like they have no choice but to continue taking this medication since the outcome could be worse if they stopped treatment (i.e., broken hip, hunched back, etc.).

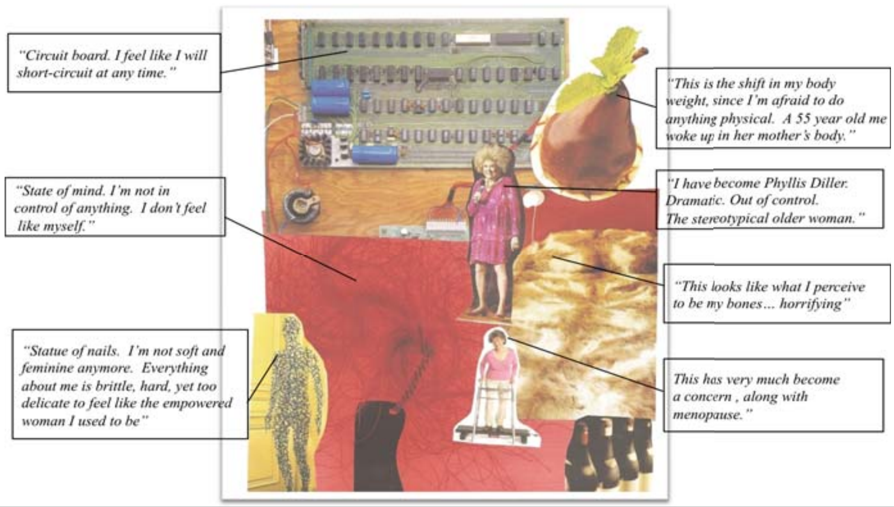
The lapsed user - those who stopped taking an osteoporosis medication due to either an inability to tolerate the medication's side effects; deciding to stop treating a condition "they can't feel"; or believing the cost of treating this condition is too high.

The recent switcher - those who recently switched their osteoporosis medication in order to either gain less-frequent dosing via another medication; the impression of a particular DTC campaign; or the wish to try a brand that could be more better tolerated by the patient.

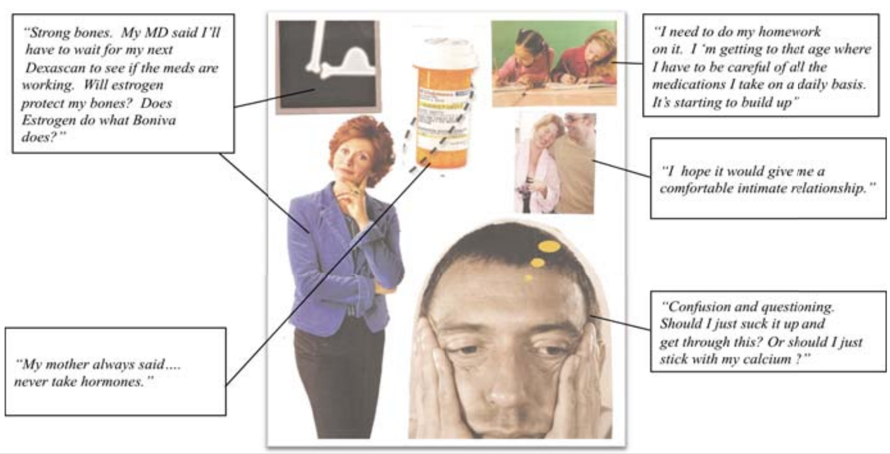
Archetype cards

Patients were requested to complete two collages as a homework exercise prior to the research - one to describe their feelings towards having osteopenia/osteoporosis and one to describe their feelings about their treatment medication. All interviews and group discussions started with a review of the collages. Multiple projective technique exercises were then introduced, including the use of archetype cards to help patients define themselves and the use of a pictorial scenario to understand their interactions with

Collage 1: 'How do you feel about having osteoporosis?'



Collage 2: 'How do you feel about taking medication to treat osteoporosis?'



their physician.

Archetypes are ancient, universal patterns of behavior that are embedded in what Carl Jung called the "collective unconscious." Author Caroline Myss has created a set of 80 archetype cards, each designed to provide the basic light and shadow attributes of a different archetype. Typically these cards are used for meditation, creative writing or for personal use in determining one's own archetypes. For researchers, the cards are a way to understand respondents on a deeper level instead of only in relation to the research topic. In this instance, they were used to examine the ways respondents define themselves and their relationships. With this knowledge, a researcher gains perspectives on how the respondent approaches products and services, whether they are early- or late-adopters, how their relationships influence behavior, etc.

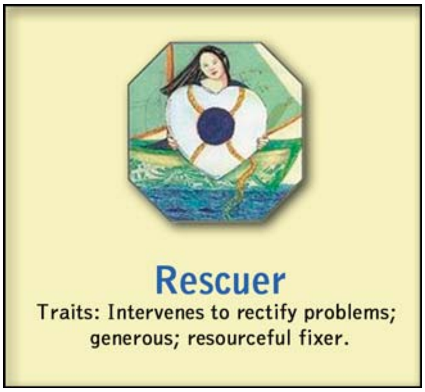
In prior research, when patients were asked how they felt about having osteoporosis, typical answers included: "I feel old," "I didn't think it was that serious," "I don't feel it so I didn't take it seriously" and "I was frightened by the word osteoporosis." The collages gave women an opportunity and an outlet to express their feelings more succinctly and revealed the disease's impact on their self-perception.

Collage 1 was created by a "dissatisfied user," whose task was to "describe how you feel about having osteoporosis." Instead of just hearing, "I feel old," we were able to get a visual picture - both because of the images she chose to represent her feelings and because the pictures allowed her to more descriptively articulate what it means to her to "feel old." This collage depicts a woman who feels like osteoporosis has changed her. She used to be soft and feminine; now she feels hard and brittle. She used to be in control; now she doesn't feel like the empowered woman she was in the past. Osteoporosis has robbed her of who she used to be and now she lives with concern and a yearning for her former self.

Collage 2 was created by a "recent switcher" in response to the question, "How do you feel about taking medication to treat osteoporosis?" Instead of just hearing, "I'm confused," this collage enabled us to see that she is not only confused by the number of medications available, but by how they will interact with other medications and whether they will have the needed effects. And we began to see a common theme: "Who do I listen to? My doctor, my mother, my friend?"

Emotional triggers

Armed with the insights from the collages, we used the archetype cards



to drill down on the emotional triggers. Are the respondents typically loyal to people and products or do they migrate from one to another based on their current situation? Do they look at obstacles as something to overcome or as another problem that plagues them and keeps them down? The archetypes the women selected helped the team understand how they are dealing with having osteoporosis and what measures they are taking or would take to fight it (or not). Of the 20 cards utilized, a few of the most popular included:

The Rescuer: Many of these women are mothers, long accustomed to putting others first (typically the current dissatisfied user) and helping them live successfully. Some have shifted priorities (such as the current switcher) making themselves a priority. They are problem-solvers and can be considered highly compliant in their treatment of osteoporosis.

The Seeker: They possess a desire to continue to learn and an eagerness to experience as much as possible. They represent a quest to understand osteoporosis and how to best avoid bad outcomes (the current switcher).

The Child Eternal: This was the choice of many lapsed and satisfied users but different aspects of this card guide their attitudes/behaviors. The satisfied user shows a zealous preservation of a youthful identity within the context of aging whereas the lapsed user is in denial of aging (i.e., Peter Pan) and thinks osteoporosis will just go away.

As a final exercise, these women were asked to interpret a stock photograph showing a doctor talking to an older female patient as she sits on the examination table in his office. Most women described this scene as, "The doctor telling me what I need to eat, what dietary supplements to take. He hands me a prescription for my osteoporosis. I listen and agree to do what the doctor says." Interestingly, we learned that although women have many questions about why they were given a particular prescription, what other options they have, what to expect while taking the medication and even how they got osteoporosis in the first place, they don't ask the doctor to explain.

Paved the way

This first phase of the research paved the way for identifying the target audience: dissatisfied users and lapsed users. These two segments were selected due to their feelings about osteoporosis and treatment options: they want to fight the disease, they just haven't found the right tool (prescription) that meets their needs (in the form of an easy regimen that fits into their lifestyle). They would ask their HCP questions if they knew what to ask.

These segments were also influenced by the success of the satisfied users, which helped the team determine the kind of language to use when targeting these segments in direct-to-consumer materials.

In addition to the identifying the target segments, this research resulted in:

- An understanding of the target patient: She is entering her post-menopausal/retirement years with great vitality and optimism/excitement about her future. She describes her HCP's involvement in the diagnosis as being low-key, making the condition seem less urgent. She told us what she needs (and doesn't need) when considering treatment options. She doesn't necessarily initiate the conversation or ask all of her questions.
- Uncovering three common emotional triggers that should be harnessed in all brand communications (to patients).
- Identifying the barriers to treatment, resulting in a "road to conversion" schematic.
- Determining relevant and meaningful message touchpoints for this patient.

Phase 2: Qualitative concept testing among both patients and HCPs

The team felt that a key element the campaign needed to address was the finding that these women are not getting the information they need from their physicians because they are not asking questions during their appointment. Concepts were therefore created to be used for in-office displays or brochures to stimulate a dialogue. However, it was apparent that even if the messages resonated with this audience, they also needed to resonate with the HCP if they were to succeed in changing behavior. Therefore, the second phase of the research was conducted among both the HCP and the patient.

Focus groups were conducted with patients to examine their experiences during their in-office visits and what was or was not discussed regarding osteoporosis and to review the proposed materials. The twist on this otherwise routine methodology was that HCPs were also watching the focus group from the background.

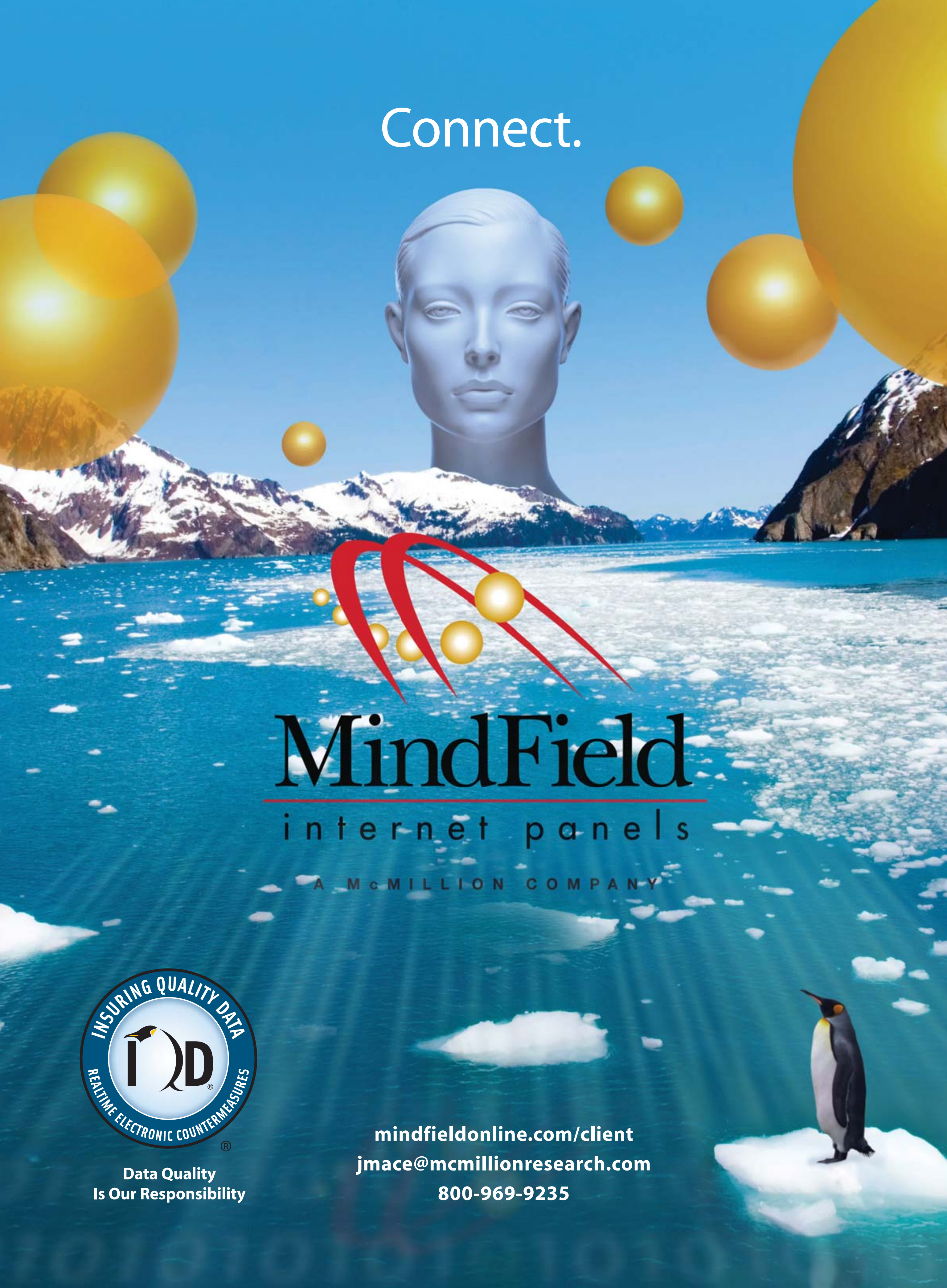
A qualitative research consultant was with the HCPs to note their reactions/comments as they observed the patients. At the conclusion of the patient focus group, a focus group was conducted with the HCPs to uncover the "ahas" that arose from hearing feedback directly from patients. They also had an opportunity to review the proposed messages and concepts and provide insight into how they would specifically use these materials to stimulate dialogue with their own patients.

The inclusion of both perspectives enabled the creation of a connected dialogue and resulted in a successful campaign for a product that was marketed intentionally as a "first switch" for patients who could not or would not tolerate the first prescribed osteoporosis medication. The resulting messages helped the patient approach the HCP with educated questions and the HCP was able to identify specific issues the patient was having with their prescription in the language the patient used. This language triggered key phrases used in both the HCP and patient campaigns which made the brand a go-to choice as a "first switch" option.

Thoughtful combination

Sometimes, in order to build a synergistic health care marketing message, targeted stakeholders - in this case, patients and doctors - should be researched in combination instead of in silos. The result can be a mutually beneficial program that encourages a strong relationship between HCPs and patients.

For deeper insights into the target audience's attitudes and behavior, a thoughtful combination of projective techniques with a variety of patient types can result in a highly productive research initiative. Couple this with a message check with health care practitioners and the researcher can give the client a host of actionable insights. | Q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pharmaceutical/health care research

Five best practices for pharma-brand Web sites

How boosting your Web equity can boost your brand equity

By Kimberly Struyk

Being entrenched in Web site measurement day in and day out for the last few years, I've seen Web metrics become an essential part of executive-level decision-making, especially within pharmaceuticals. In an industry like pharmaceuticals, in which consumers can feel both overwhelmed and undereducated by the information that's available (and, as a result of that confusion, distrustful), maintaining an influential pharmaceutical-brand Web site that satisfies all visitors - from sufferers to caregivers - is no easy feat.

Still, it can be done, and I have watched some best practices take shape for doing so. Bear in mind that these best practices are merely the basics and a good starting point to propel digital branding forward.

The key to unlocking the power of the brand Web site is to design it from a consumer point of view, by listening to and observing Web site visitors. There are some fundamental themes that occur when monitoring visitors and linking their thoughts to the performance of the Web site. Just as the digital medium is growing in importance, these Web site fundamentals should be as well.

1. Satisfy the need-state.
Sufferers and caregivers have different needs; a successful pharmaceutical-brand Web site will fill the need-state gap.

Time and time again, we see many different types of visitor profiles while looking across the full spectrum of Web site visitors. On the consumer side, both sufferers and a large majority of caregivers decide to visit pharmaceutical Web sites. The key takeaway here is that if two unique groups have two unique sets of needs, they will likely respond to the Web site differently, especially if the needs of each group are not being met.

Companies must take the time to develop content that satisfies both groups, even if it means providing the same content through different avenues or tones. Typically, caregivers yield an even more pointed challenge than sufferers, as they must address the disease head on while also offering a helpful and supportive hand to the sufferer.

The question is, which type(s) of information will be relevant to both groups? Does each group call for a different Web site and a different campaign, SEO/SEM, etc.?

snapshot

The author offers five best practices, including testimonials and Web 2.0 tools, to improve a pharmaceutical-brand Web site's ability to meet the needs of visitors - disease sufferer or caregiver - and in turn boost the brand's reputation.

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The data collected has shown that this is usually not the case; after all, the site is already capturing these two mutually-exclusive audiences. Instead, it is important to provide the information clearly and concisely and organize the Web site in a manner that responds to the two different need-states or pretenses under which these groups are arriving to it. Following this best practice can foster long-term partnerships with either sufferers, caregivers or both groups and ensure that Web site satisfaction and usability are taken to the highest level of customer service.

2. Sufferer or caregiver - knowledge is power.
Educational material about the disease/condition is always widely desired. Therefore, a good start is to always (and we mean always) use the site as an educational tool about the disease. On average, about seven in 10 visitors come to the brand medication Web site to learn about the product or the category (Figure 1), even though there is a flood of information available through the many online medical portals. This indicates that consumers look to the brand for education about medication in conjunction with a 30,000-foot overview of the category, disease and treatment.

A common argument when discussing this topic is that consumers are still wary of branded pharmaceutical information. We present a reverse argument: Isn't it time to provide these consumers with the information needed to increase trust levels? Knowing consumer wants

Figure 1

Individuals do not make decisions about their health on a whim; provide them with content needed to guide their research.

Arming visitors with knowledge to make informed decisions helps a brand stand out as a partner in the research process, ultimately increasing the likelihood that consumers will turn to that brand for treatment.

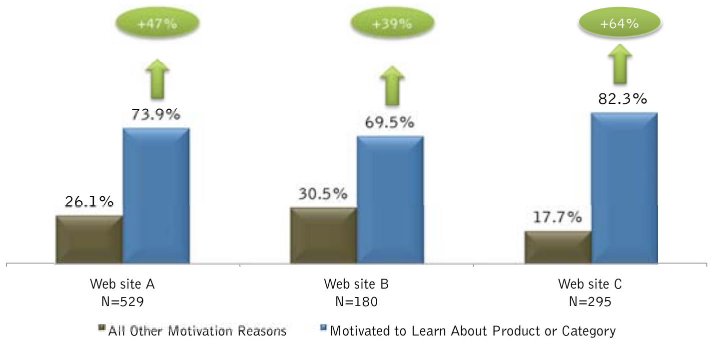
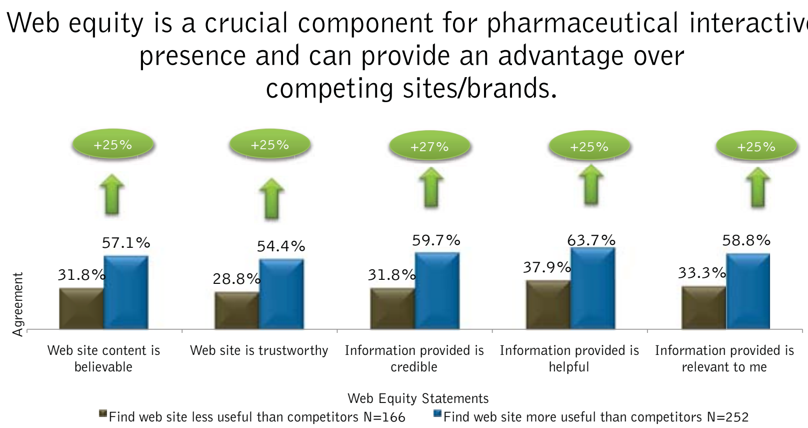


Figure 2



and needs on a firsthand basis will help the pharmaceutical industry deliver in a more trustworthy manner. This is of course part of a recent trend that shows more consumers now than ever are likely to visit branded Web sites.

Even more importantly, sufferers do not usually make decisions about their treatment path on a whim, so it is mandatory for brands to guide sufferers in their online research. Brands have the opportunity to stand up as a partner in the treatment decision-making process. Creating the Web site as a one-stop shop for disease-state information is a proactive approach to being heard as a brand and to aid in solidifying sufferer decisions while cutting out other outside influencers. At the end of the day, this instills trust among consumers and increases the likelihood that they will request a script, ultimately moving more prescriptions into their medicine cabinets.

3. Web equity is integral in Web site performance.

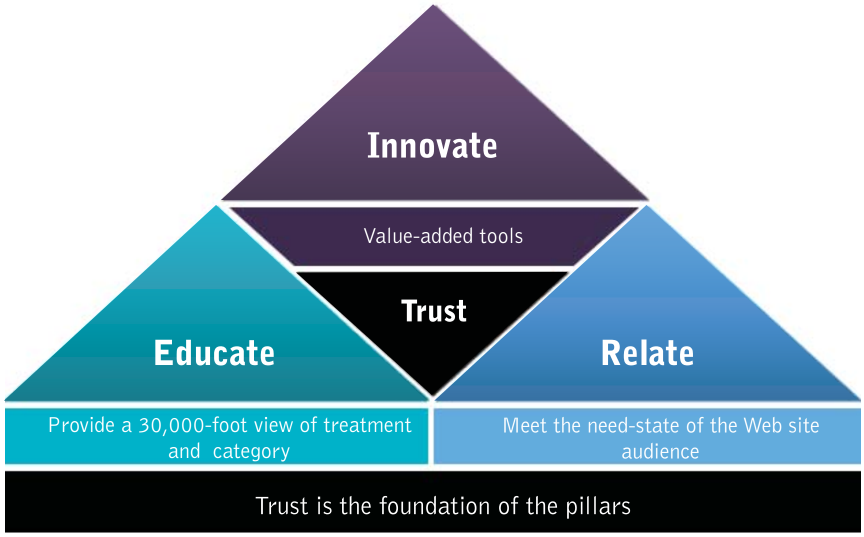
"Web equity" may sound like a new concept to some, while brand equity most likely does not. Think of the Web site as a platform that showcases brand equity. To quickly define the Web equity concept, it is messaging that can be built and established through Web site content. The Web site can do a brand justice or injustice depending on how it is utilized.

Let's take a moment to think about how Web equity can impact a brand, or in this case, how it has impacted the pharmaceutical industry as a whole. As mentioned above, previous research has shown that trust tends to be low among pharmaceutical-brand Web site visitors. Digging a little deeper, this corresponds with the Web equity that has been built since the onset of the digital era and subsequent Web site development.

It is fairly apparent that the concept of Web equity may have been overlooked or messaged improperly for years. The industry as a whole now suffers and is left to pick up the pieces by ensuring the concept is fully grasped and delivered appropriately in the future.

Figure 3

The four pillars of a "blockbuster" Web site that impact treatment decisions



So how can we move forward from here? First, be aware that Web site content holds a certain equity or power for pharmaceutical brands. Research has identified that a few distinct Web equity metrics such as relevance, trust and credibility must be monitored at all times. If these attributes decay, the breadth of the site content will not exert much influence over the treatment decision and can in fact steer visitors away, as seen in Figure 2. Visitors not in agreement with Web equity statements will not find your Web site as useful as a competitive Web site that provides these subtleties in content and messaging.

Overall, Web equity is a catalyst that sparks a positive change in positioning, thereby having the power to influence competitive positioning. Time and time again, it is uncovered that Web site optimization is needed from a content/messaging perspective over a usability perspective: It is this very concept that often feeds into those strategies and recommendations.

4. Appreciate the impact of product testimonials and put them to good use.

Product testimonials are usually sought after, especially within the pharmaceutical industry. This is particularly true with regard to life-threatening categories, where support and confirmation about treatment of choice are needed on a continual basis. Moreover, testimonials can help strengthen the Web equity platform and move sufferers down the treatment funnel.

As discussed previously, Web site visitors seek to become educated and informed about product information when coming to the branded Web site. Moving beyond the basics, testimonials can aid in a sort of disease-state digestion. When utilized correctly, testimonials featured on brand Web sites provide a means of coping on an emotional front by educating through the hands-on experience of other sufferers.

While testimonials provide consumers with reassurance that can help guide their treatment decisions, they also help facilitate positive ratings for the Web site experience. When testimonials are featured on a pharmaceutical Web site, metrics have in turn achieved double-digit lifts that range from 10 to 24 percentage points higher than without testimonials. The brand Web site is a great stage to create this type of emotional camaraderie that can propel site performance and equity scores into new realms of success.

5. Do more than the bare minimum - think Web 2.0. From a usability point of view, always implement value-added Web site features. Functioning in the time warp of the digital era, brands should already be beyond the basic nuts and bolts of site performance, (i.e., easy to navigate, a polished appearance, loads quickly, etc.). There are simple adjustments and tools that can be added to Web sites to attach value to the experience. Research shows simplified condition and symptom trackers prove to be most beneficial to those experiencing an ongoing condition or who have been newly diagnosed with the condition.

To deliver on the need-state, understanding the mind-set at the time of diagnosis is advantageous. Sufferers generally look to outline goals after first researching the condition and treatment options. This planning process is necessary to set goals and deal with the condition, which can often seem distant to the sufferer at the time. Catering to this mind-set enhances hope that the sufferer can turn their condition around or at least learn to cope. For those suffering from a chronic condition, it is expected that a brand should assist in condition management by providing useful tools.

More often than not, static tools (PDFs, downloads) are housed on pharmaceutical Web sites and still fit into the Web 1.0 mentality. This means that the tools usually are great ideas but their design and placement on the site are not being maximized. These elements were not built to be fully engaging and attract repeat users.

As Web sites evolve, we recommend using the same tools that are appropriate for the condition at hand but bringing them to life through interactivity between the brand and the consumer. One piece of advice for doing just this is to build these tools from a lifestyle change point of view. For example, a tool that provides recommendations for a lifestyle change would be better received if there is a personalized touch associated with it. Taking the sufferer's current lifestyle into account (i.e., hours of work, exercise habits, activities, roles and responsibilities, etc.) will provide a more targeted solution. This will deliver the most relevant insights that can be put into action after consulting a pharmaceutical Web site.

It should be noted that these interactive features are somewhat ahead of industry trends and can be advantageous to early-adopters. Once they are established across all Web sites, mobile phone apps may increase in popularity and be applied for condition-tracking tools. Convenience must always be at the forefront of design.

Four pillars

Underlying the aforementioned best practices are four pillars to pharmaceutical Web site success that should feed into design fundamentals for this type of digital platform. These four pillars should remain top of mind when assessing your current site, optimizing it further or designing a brand new initiative.

Upon comparing your current Web site to the four pillars, if you find the site is off-target, begin closing the gap by addressing these details accordingly. Once the gap is closed, it is then time for attitudinal measurement to learn the dos and don'ts for your Web site audience. Web site measurement will get the ball rolling for the optimization process but before doing so, keep this tip in your back pocket: Traditional metrics and methodologies used to measure impact can still be applied to measure your online digital initiatives. Accountability to justify investments is often the first barrier that is faced when entering into measurement for the digital arena.

While attempting to build Web equity, improve the customer service platform or whatever your objective may be through the online initiatives, remember these best practices and always to put your visitor first. And perhaps even more importantly, track the initiatives to make sure they are working. | Q pharmaceutical/health care research

This relationship needs more managing

Interviews with pediatricians found mistrust of pharma firms' CRM and SFA programs

By Mary Jean Koontz

Today's pharmaceutical companies are in the midst of global transformation, many investigating how to develop greater trust among a subset of "platinum" physicians who, due to decreasing insurance payments, have increasingly limited time to learn about new and emerging drugs. Current pharmaceutical customer relationship management (CRM) and sales force automation (SFA) programs are being perfected to hopefully wield even greater influence on doctors and their prescribing habits.

But what is the actual impact of all of the CRM efforts on the physicians? Have the millions of dollars invested in pharma CRM and SFA systems had a positive impact in regards to increased trust with physicians?

The author conducted a national qualitative interview-based study of pharmaceutical managers and American pediatricians to determine the intended (pharmaceutical corporate side) impact of drug makers' CRM programs on pediatricians vs. the actual impact, as determined via interviews with a cross-section of American pediatricians.

The research came to the conclusion that many of the CRM and SFA programs had a negative, or at best, neutral impact on doctors. However, physicians in management positions stated that CRM-based marketing likely influences them to prescribe more of a certain company's medications.

Effectively divide up

CRM and SFA software allows pharmaceutical companies to effectively divide up doctors into profitable vs. unprofitable segments. Zeithaml (Zeithaml, 2001) developed the customer pyramid to show how a major pharmaceutical company segmented customers (physicians) into platinum, gold, iron and lead segments by "viewing physicians as long-term strategic assets" and thereafter targeted them based on potential profitability across the company's drug portfolio (rather than on current sales within a single therapeutic category) (Zeithaml 2001).

Segmenting physicians according to their profitability requires a drug company to consolidate physician databases across business units. The pharmaceutical companies used the following inputs for their "physician profitability analysis":

- the volume of prescriptions a

snapshot

While customer relationship management and sales force automation programs can be a boon for pharmaceutical companies, the author's research shows that they may also be alienating the very audience they are meant to exploit: doctors.

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Rx
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particular physician generated (via IMS Health data);
- the value of prescriptions;
- the cost of a sales call;
- the cost of product samples;
- product gross margins, rebates and discounts (Zeithaml 2001).

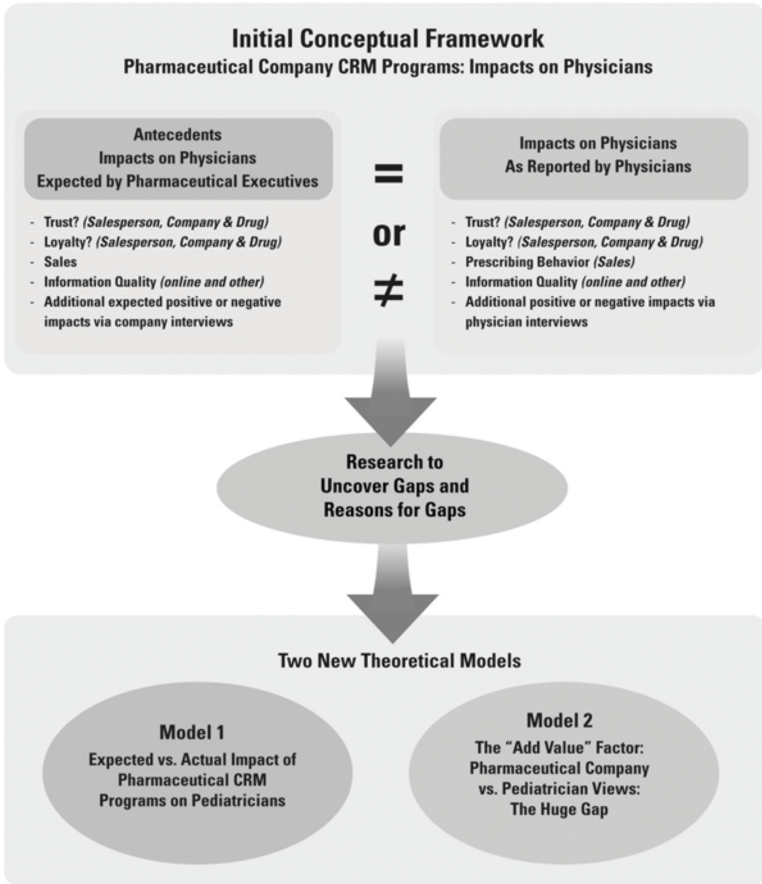
Research framework and methodology

The author's research focused on pediatricians as a subset of physicians. The research framework is shown in Figure 1. The research was conducted in two major phases. In year one, the pharmaceutical executives were interviewed. In year two, the pediatricians were interviewed.

Eight total in-person and telephone interviews were conducted with managers and executives at medium to large-scale pharmaceutical companies. They were recruited via industry contacts, followed up by written agreements between the researcher and manager not to mention the company name or the exact title of the pharmaceutical manager.

The focus of the interviews with the pharmaceutical managers was to learn the overall company/industry objectives of the CRM and SFA programs. Responses ranged from comments such as this one, from an executive, "That's simple, our goals are to increase sales" to a lower-level manager, who explained in detail his efforts to further develop a repository of medical study articles that would eventually be served up to the relevant physicians.

Figure 1



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Once the pharmaceutical management interviews were conducted, the researcher developed the physician discussion guide. Pediatricians were recruited via personal interactions at two national pediatric conferences. Due to the fact that the research was academic, not commercial, pediatricians were open to being contacted later for a telephone interview. Although the physician sample was small – 35 total – it included a national representation of private-practice, research and HMO pediatricians.

Analysis

Respondents were promised that their name and affiliation would

Figure 2

Theoretical Model #1

Expected vs. Actual Impacts of Pharmaceutical CRM Programs on Pediatricians

− Negative Impact
+ Positive Impact
O Neutral Impact

CRM Program	Pharma Use	Pharmaceutical Executive Expected Impact on Pediatricians	Pediatrician Perceived Impact
Website	Company and Drug Information and Advertising	Increase Company/Brand Awareness	−
	Company and Drug Information and Advertising	Provide Drug Information	O
Continuing Medical Education (CME) Sponsorship	Indirect Advertising to Build Company and Brand Awareness	Increase Prescriptions of Products Mentioned in CME Programs	−
	Educate pediatricians	Increase trust by providing needed CME	+
Campaign Management Systems	Direct Mail Management	Increase prescriptions via increased brand awareness and thus brand recall and use	−
	Trade Show Management	Target marketing to pediatricians who show interest at trade shows and seminars	O
CRM Analytical Software	Segment Physicians	None, internal tool.	O
	ROI Calculations on Physicians and Physician Classes	None, internal tool	−
	Select Influential Physicians for Speaker Bureaus and CME	Increase trust by providing needed CME programs	+
	Provide Information to Pediatricians in Desired Format and about Topics of Interest only.	Provide pediatricians only desired	+
Sales Force Automation Software	Record Sample Delivery and Conduct Sample Return on Investment	Provide Samples, which in turn, Lead Pediatricians to Prescribe the Sample Drug	+
	Sales Management and Targeting by Drug Representatives	Increase Prescriptions from those Most Likely to Prescribe	−
	Standard PowerPoint Education Presentation by all Drug Representatives	Provide PowerPoint presentations that have drug information needed by pediatricians	−
	Provide Free lunches and Small Gifts to Pediatric Offices.	Increase Trust of Clerical and Nursing Staff, who might Influence Recommended Drugs.	O
Foundation of all CRM Programs: Physician Data Warehouse Data Sources: SFA System, Purchased Prescription Data, Internal/external databases			−

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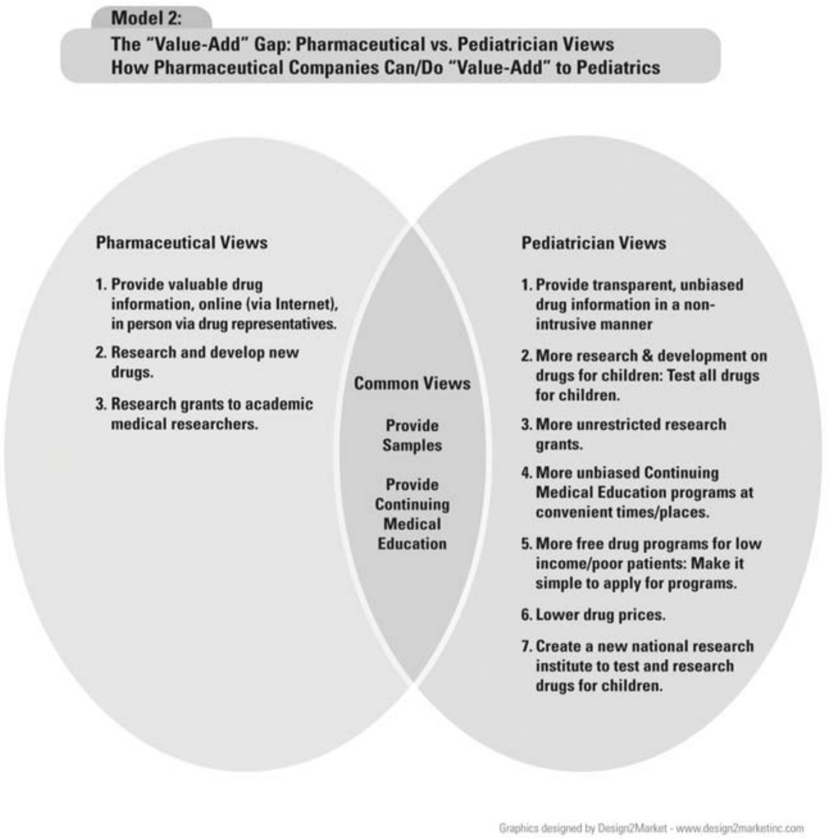
be withheld from the final report. The interview digital .wav file was downloaded onto a computer and transcribed into a Word document. Pseudo first names were randomly selected for all participants. The researcher used ATLASti software for the thematic analysis of the pharmaceutical company interview data. The researcher developed over 50 codes, which were then assigned to the pharmaceutical company interview transcripts. The codes were then grouped into families or themes.

For the physician interviews, the researcher used SPSS software to conduct the analysis. Since SPSS allows for up to 250 characters in a quote, the researcher was able to create "quote" variables in SPSS. The researcher then used SPSS to sort and group the quotes according to various demographic and psychographic variables.

The majority of "perceived impacts" of pharmaceutical company CRM programs were either neutral or negative, although pediatricians did mention some positive impacts.

Figure 3



The points below summarize the pediatricians' perceived impacts of CRM programs.

Most prominent negative impacts

Non-transparent, unreliable information about drugs. Glossy advertising-type drug brochures and presentations lowered the already low level of trust between pediatricians and pharmaceutical companies.

Aggressive, insistent drug representatives who use SFA systems to "analyze and segment" physicians. This leads pediatricians to have an even lower level of trust in the drug representative.

Most prominent neutral impacts

Pharmaceutical company Web site. Most pediatricians do not visit pharmaceutical company Web sites as they are viewed as biased toward the company's drugs.

E-detailing. Most pediatricians had no experience with e-detailing, expressing a neutral opinion of its impact on their medical practice.

Most prominent positive impacts

Continuing medical education (CME). Pediatricians view CME as having a positive impact on their medical practice, especially if the program is not biased towards one company's drugs.

Drug samples. Pediatricians viewed the distribution of drug samples as having a positive impact on their medical practice, particularly for their lower-income patients.

Manipulative and pushy

CRM and SFA software programs allow pharmaceutical marketing and sales people to perform more aggressive and standardized marketing campaigns. From the pediatricians' perspective, more aggressive marketing and sales is often seen as manipulative and pushy behavior.

This research concludes that the majority of interviewed pediatricians had a healthy distrust of pharmaceutical companies. While most pediatricians were not highly aware of the variety of CRM programs targeted at physicians, when they were made aware of the programs and their intended impact on physicians, the level of trust in pharmaceutical companies decreased.

The research also points to the conclusion that the majority of pediatricians do not trust the data in medical studies and papers provided by pharmaceutical companies. SFA and CRM programs allow drug representatives to deliver canned and company-approved research reports. The majority of pediatricians interviewed expressed concern that pharmaceutical research data does not include any negative findings; some even suggested studies that are showing negative results are stopped before completion.

Elizabeth, a young academic research pediatrician, accurately described the reasoning behind much of the lack of trust in pharmaceutical company research: "With regard to the research piece, I think the biggest problem is when there is a research project and the pharmaceutical company has control of the data and they have control of the manuscript. Since they have a vested interest in the financial outcome, it could influence the way the data is interpreted or presented. That, to me, drives the problem with trust."

Even less trust

Pediatricians feel manipulated by the pharmaceutical companies; they don't trust the marketing management to provide honest information about drugs. Furthermore, the advent of consumer prescription drug television advertising has led pediatricians to have even less trust in pharmaceutical companies. Pediatricians suggest that TV ads are misleading and deceptive, as illustrated by the following quote from Justin, a doctor in private practice: "Now it seems that most of the pharmaceutical companies spend more of their time and money marketing directly to the public, who are naive and don't understand that these are people with profit motives, that the drugs on TV aren't automatically much better just because they're on TV. It makes patients think there's

Research Company Spotlight - Pharmaceutical Research

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www.adelphigroup.com

all global
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www.allglobal.com

Anderson, Niebuhr & Associates, Inc. » SEE AD 34
651-486-8712
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Answers & Insights Mkt Rsch.
317-815-9901
www.answersandinsights.com

ARSgroup
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Assistance In Marketing
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www.aimresearchnetwork.com

Attitude Measurement Corp.
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www.b2binternationalusa.com

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Camille Carlin Qualitative Research, Inc.
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Catalyst Group
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www.catalystnyc.com

Cooper Research, Inc.
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Cooper Roberts Research, Inc.
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CRG GLOBAL, INC.
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www.crgglobalinc.com

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Customer Lifecycle, LLC
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www.customerlifecycle.us

Digital Research, Inc.
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www.digitalresearch.com

Directions In Research, Inc.
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Fact Flow Research
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210-734-4346
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www.hsra.com

HCD Research, Inc.
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The HSM Group, Ltd.
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650-298-8555
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www.jtfacts.com

Kadence International
508-620-1222
www.kadence.com

KGC
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www.kgc-qualitative.com

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a cure for their disease, there's a better drug than they're getting, that newer and more-advertised is better. Oftentimes, they're not."

Little knowledge

Pediatricians don't trust that the average drug representative is knowledgeable about the products. With SFA-based "canned presentations," the drug representative is thought to have little knowledge beyond what they've been "trained to say." Furthermore, SFA-based systems set quotas for samples, visits and prescriptions, leading the average sales representative to become pushy and aggressive in getting physicians to prescribe their drugs so they can "meet their sales quotas" and make their much needed commissions.

One pediatrician said: "Drugs are the same product like a car or anything. Working on commission certainly creates problematic conflicts at times. When you're buying a car, at least you're buying it for yourself. When you buy a drug, or you prescribe a drug, it's not for yourself, it's used by someone else. If there are inappropriate incentives or pressure, it takes it to a different philosophical level."

Pediatricians with 25 years or more experience spoke of how the knowledge level of the average sales representative has declined, adding that, with fewer career drug representatives, "it is more difficult than in prior years to develop trust over time."

All of these factors have contributed to a general decline in trust between the drug representative and the pediatrician. While CRM and SFA tools allow drug representatives to efficiently target-market, the majority of pediatricians find it offensive to be the "target" of a marketing operation, when they are simply trying to help their patients maintain their health or recover from an illness.

Two models

The research resulted in two

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MAXimum Research, Inc.
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www.maximumresearch.com

MCC Qualitative Consulting
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McMillion Research Service » SEE AD 36, 37
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Millward Brown, Inc.
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www.millwardbrown.com

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www.moosbruggerinc.org

Marketing Research Services, Inc.
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National Analysts Worldwide
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www.nationalanalysts.com

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Observant, LLC
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www.observant.biz

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PinPoint Research
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models, as shown in Figures 2 and 3. Model 1, which presents the expected vs. actual effects of CRM programs, shows that once aware of CRM-based physician targeting, pediatricians had negative opinions of nearly half of the CRM programs.

With their trust in pharmaceutical companies declining, what do the pediatricians really want from the pharmaceutical companies? The researcher asked company executives and pediatricians how the pharmaceutical makers can add value to a pediatric practice. Model 2 shows the vast differences between responses from the two parties.

The doctors' wariness makes it clear that pharmaceutical companies must carefully consider how they incorporate the value-adding concepts mentioned by pediatricians into their customer relationship management programs. But one promising course of action would be to develop and publicize CRM and SFA programs that focus on the stated needs of the pediatric community, namely:

- publish transparent unbiased medical study and drug information;
- fund unrestricted medical education and research grants; and
- educate physicians about drug representatives' use of SFA tools (the majority of physicians said they would like to be able to view their own prescription history; this information resides in the typical SFA system).

Achieve the goal

While there are no guarantees, were pharmaceutical companies to implement the above measures - and others that take physicians' needs and viewpoints into consideration - it is likely that physicians would increase their overall level of trust and enable the industry to achieve the previously-stated goal of its CRM programs: increased sales. | Q

Reference

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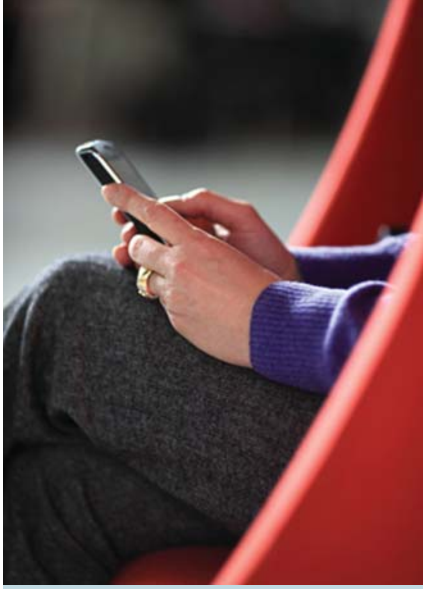
mobile research

On-the-go and in-the-moment

Mobile research offers speed, immediacy



By Tanja Pferdekaemper

With already-declining response rates, the market research industry entered the economic crisis in trouble and is emerging from it with a strong call for doing things different. Better, faster, cheaper. These mantras echoed over the last year and have been responded to with forays into proprietary panels and the social media community space to see how to extract insights from qualitative threads among consumers.

Another strong option? Mobile research.

The climate and conditions to support mobile research are here. High rates of mobile phone adoption? Check. Coverage? Usability? Mobile Internet penetration? Check, check and check. But the real stimulus to its application is market demand, the demand for convenience and for research respondents to be able to select the best time, place and channel through which to share their opinions.

(A definition of what we mean by mobile research: self-led participation in surveys using one's own mobile phone via mobile Web, SMS or MMS. We do not mean moderator-assisted interviewing with a mobile [CAPI] or telephone research to mobile numbers [CATI].)

As we work to earn respondents' trust by keeping the survey process engaging and satisfying (and not overlong and frustrating), one of the most important steps a researcher can take is to go where your audience is and operate on their terms. The mobile phone is a great vehicle for doing that.

Leapfrogged landline phones

Adoption of mobile phone technology has been amazingly swift and widespread, with some countries now boasting near 95 percent penetration. Not surprisingly, penetration of the landline telephone, a communication tool that market researchers have relied on for decades to reach consumers, is in decline. Some emerging markets have leapfrogged landline phones altogether, making the mobile an ideal route to conduct research with consumers in countries/regions such as China, India and Africa.

What this means is that those researchers relying on CATI will find it increasingly time-consuming and expensive to use the

snapshot

Using examples from brands such as Coca-Cola and Nokia, the author explores the capabilities of mobile research and how it lets marketers get fast, fresh responses from consumers.

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methodology to deliver the sample sizes and representation requested by clients.

In fact, many researchers are likely doing "mobile research" whether they know it or not! More and more, online surveys intended for desktop access are being taken on mobile phones – or, potentially even worse, when respondents attempt to respond via mobile Web, the surveys can't be accessed through a mobile device.

Figure 1

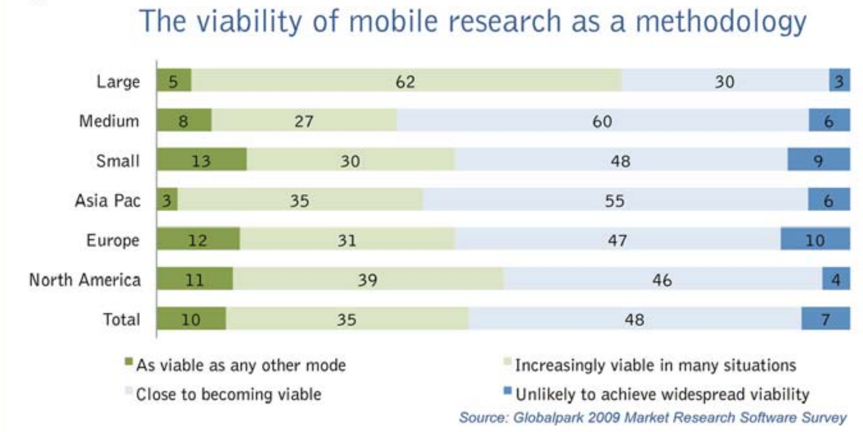
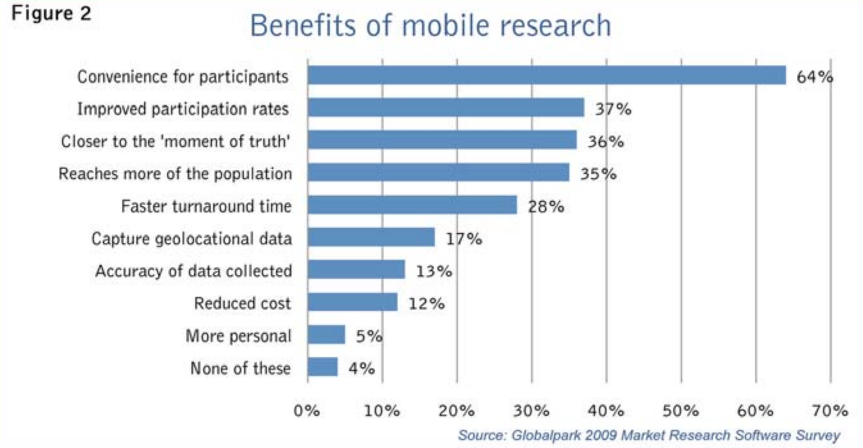


Figure 2



Go far beyond

The No. 1 reason to use mobile research is convenience to the respondent. But the benefits of the channel go far beyond that. The mobile phone offers: access to people otherwise unreachable, to locations otherwise unattainable; speed, with near real-time responses and ability to react quickly to feedback; and enriched insights including in-the-moment feedback, photographs and geolocation, whether prompted through triggers like quick-response codes on ads, or self-led as is common for a diary approach.

Access. As more consumers use the mobile Web, the increasing penetration of mobile and smartphones offers new possibilities for market researchers. For example, almost all 14-49-year-olds – a key target group for advertising and media planners – own a mobile phone, as well as certain harder-to-reach audiences such as younger consumers and B2B professionals.

Younger respondents in particular engage with mobile research. This is hardly surprising given the array of devices they own and amount of time they spend on them. In fact, the Kaiser Family Foundation found that a new generation of "multimedia children" was spending seven hours a day on their smartphones, iPods and games. U.K. firm Fly Research found that 95 percent of its surveys were opened when sent by text, compared to 25 percent by e-mail among their mobile panel of 18-25-year-olds.

Access also relates to where your audience is. Guy Rolfe, global mobile knowledge leader at Kantar Group, has been working with the group to facilitate ways of carrying out research in a whole range of territories. He cites East Africa as an example where face-to-face research is very expensive, and in those cases mobile either replaces or supplements the approach.

A key advantage of using mobile handsets for market research is that respondents can be reached on the move. Consequently they can be asked to provide opinions and attitudes quickly and at the point of experience. This can increase the validity of the survey results, giving pure, context-related information about experiences and emotions within a situation and in the environment where the exchange with the customer takes place. This could be directly at the point of sale, in shopping malls, retail parks and service points, at public events, trade shows or even on the road. The technique has been used by event organizers tracking satisfaction levels to measure sponsorship recall at major sporting events or for diary studies where participants send a text or photo whenever they encounter a brand.

Speed. Increasingly marketers are demanding instant feedback on their campaigns. In tests carried out on its mobile panel in 2009, Lightspeed Research found 60 percent of completed surveys were returned within 15 minutes of distribution and 90 percent within an hour – response rates simply not experienced on any other platform. Fly Research has found similar rapid response rates: on average 85 percent of responses are returned within two hours on their mobile panel of 18-25-year-olds.

In one case study given at the Mobile Research Conference 2010 in March, Linda Neville of Coca-Cola discussed how Coke researchers tracked emotional responses to messages on the product in-store, as well as advertisements, in order to update print ads.

The project used the mobile phone as one research platform to help Coca-Cola understand the various touchpoints respondents – who had been recruited through an online panel – had with a short list of specific brands.
The first stage of research involved an online questionnaire to understand people's relationships to the brands. Then, using their mobile phones for the second stage of the project, respondents were asked to text whenever they came into contact with one of these brands

Five tips for mobile surveys

1. Keep the SMS invite short (think Twitter not *War and Peace*).

2. Make sure you cover the costs a respondent might incur.

3. Avoid complex matrix questions.

4. Encourage active engagement - photos work well.

5. Surveys sent between 5-6 p.m. regularly receive the highest response rates.

over a period of a week and reply to a text containing a code frame using four simple characters.

These texts provided information, including where they saw the brand, how they felt about the touchpoint and how likely that made them to choose the brand next time.

The mobile approach met a number of the key objectives, including providing research findings in real time, which allowed Coca-Cola to quickly make changes in its ongoing "topical" campaign in newspapers as the results were analyzed. It was also able to capture experiences with the brands being measured as they happened, including photos.

Enriched insights. In addition to in-the-moment feedback, the mobile platform offers the ability to "go where no researcher has gone before." At least, without the time and expense typically associated with it.

The mobile phone is, by nature, a personal device. As such, it allows researchers to get up close and personal to respondents. It has been found that individuals are more likely to respond to "private" questions and diaries using their mobile device than they would online or by telephone. What's more, people are happy to send photographs and videos of themselves, brands, events, advertisements - almost anything you ask them to.

In one example, Nokia launched a project to gain a better understanding of "brand love." Mobile research was used as one of the methodologies because it allowed respondents to capture interactions with brands and emotions as they happened. Each respondent was given a mobile phone and asked to take pictures and videos of themselves in their daily lives when they came across a brand they either loved or hated. Respondents were then able to use a moblog (mobile blog) to upload videos and pictures to the site. Selected participants were then invited back to discuss the findings and probe the idea of brand love in group forums.

Reviews are mixed

What does the research community think? Reviews are definitely mixed, and the value of mobile varies considerably across businesses. But if the recently published annual Globalpark Market Research Software Survey Report is anything to go by, mobile research is going to experience a boost soon. [*Quirk's* will feature Tim Macer's review of the report in an upcoming issue. - *Ed.*] Market researchers across the globe were asked to comment on the viability of mobile research. As shown in Figure 1, the larger agencies had a more optimistic perspective, with two-thirds saying it is either viable now or "increasingly viable in many situations." Medium-sized companies and those from Asia-Pacific were more cautious, with just over a third responding positively to the question.

These results are hardly surprising when we look at the benefits of mobile research according to those surveyed (see Figure 2). The top four are all closely related to the respondents – their convenience, encouraging them to participate, being closer to their "moment of truth" and reach. Interestingly these benefits are all quality issues rather than efficiency or opportunities for collecting new types of data.

But, before mobile research goes mass-market, there are a couple of hurdles to overcome. Data integration will become a big issue for the future. Finding ways to combine results from different methodologies will be essential if researchers are to reach consumers on the devices they use, and want to use, to complete surveys.

Online panel providers need to address the fact that online surveys will inevitably, and increasingly, be completed on the mobile Web. At present, many simply screen out respondents who carry out surveys in this way but as smartphone penetration increases, they will need to use software that recognizes the device and adapts the interface for the user. It will become increasingly important to deliver online surveys that are optimized for both the desktop and the mobile Web.

I for one hope that the future means there will be more companies using the technique and exploiting the significant benefits it offers the researcher. Panel companies are today focusing on improving the respondent experience and, as we've seen, the larger market research agencies see a real role for mobile research in achieving this goal.

The early users of mobile research are already learning from the world of mobile marketing, using new technologies to push the boundaries of what is possible. For example, Kantar's Rolfe discussed examples of augmented reality used in mobile surveys at the Mobile Research Conference, and we've all heard the term "surveytainment." Increasingly in our world of many personal communication devices consumers are difficult to reach, and even harder to engage with. Mobile research can play a vital part in accessing and engaging respondents for mutual benefit.

Established roots

Mobile research is still in its infancy, but it has certainly established roots in that there have been several practical applications of the methodology – a lot of lessons learned and experiences and best practices shared. For many of us, it is clear that mobiles are relatively unavoidable. But it isn't something that should be grudgingly accepted – the opportunities it opens beyond pure data collection are abundant and it offers the chance for organizations looking to better understand consumer behavior to glean exciting insights. | Q mobile research

One size does not fit all

How and when to conduct mobile research appropriately

By Emily Goon

In conjunction with this issue's focus on mobile research, *Quirk's* interviewed our go-to research industry expert Tim Macer, managing director of U.K. consulting firm meaning ltd., to get his views on the strengths and limitations of mobile self-completion research, the impact of the iPad, tips on designing mobile surveys and how our relationships with our smartphones may work to a researcher's advantage.

What types of issues do potential mobile research practitioners and buyers need to mindful of?

Mobile research represents an additional touchpoint with respondents, which I think we need to look at as supplementing the other methods. It's inappropriate to think of it as being a replacement technology, which is effectively what online research has been. And perhaps online research has been pushed too far in that direction.

The opportunity we have at the moment is that devices are much more user-friendly and much more prevalent so you aren't necessarily going to find that you are just researching among an elite group of early-adopters. Although, while we are a little bit beyond the early-adoption stage of mobile technology, sampling is still definitely an issue with mobile self-completion research. That's not to say it's an insurmountable issue – it depends on your sampling frame and who it is that you're expecting to contact. It's likely that it's going to be people who have more disposable income and who are more highly-educated and so on adopting this kind of technology.

What are the similarities and differences, both in practice and in theory, between SMS-based mobile surveys and Web-based mobile surveys?

A bias exists among mobile respondents, and it's very dependent on what kind of mobile interviewing you're going to be doing [SMS vs. Web]. The lowest common denominator is to use SMS text messaging because it's available on everybody's mobile phone. Mobile phone penetration has reached the point where it is at saturation in most developed economies and is much better than Internet penetration in many developed economies as well, so it's a fairly ubiquitous device if you're able to use it for SMS. However, SMS surveys are very limited in what you can do. That's not to invalidate it, but you are really restricted, some people would say,

snapshot

Research industry consultant Tim Macer chats with *Quirk's* regarding the pros and cons of mobile self-completion research and how it can complement existing methods.

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to five or six questions. Other people would say a survey with more than about three questions is probably too long for SMS. That's a huge limitation. You have the advantage of coverage and reach but are very limited in the length of the survey and the way in which you can ask those questions.

Once you move on to using Web-type surveys [delivered to a smartphone that has a Web browser in it] that really opens things up. There are still limitations but the limitations are much more manageable for many surveys. The difficulty you have is the penetration and the reach. It has gone beyond the early-adopter stage but it's still typically a minority of people who actually have access to mobile Web. That's very similar to where we were with Web surveys about 10 years ago, in that it's very much a minority that has access to these kinds of surveys.

What can mobile research accomplish that traditional or traditional online research cannot?

One special capability is the intimacy aspect of it and the extent to which it is a personal device. The moment-of-truth thing is quite interesting as well because it means that you can actually ask fairly sophisticated questions of people at the point where they actually experience something or have really closely experienced it. Mobile research presents the opportunity to get much closer to respondents at the moment of truth - the point they are actually engaging with services or interacting with products - than you can, say, with an online survey, where you're still relying on the recall of the respondent at a point later in time.

A good example of this is the diary-type survey where people are expected to fill in advertising, TV viewing, radio listening or other media or product consumption that they've observed throughout the day. This is notoriously misleading, as people will omit things later on - they just forget things or forget the context. If you're trying to ask people not just about the beverage that they consumed but the context of the arena at that time - these are things that are very difficult to recall accurately. If they're able to complete the surveys as they're going along, that's very powerful and you're likely to get much more realistic and accurate data.

Another advantage with the mobile solution is that you have real-time communication happening. The data is coming back as people are entering it. These are some of the same advantages that you have with Web surveys - the speed of turnaround.

What are some ways researchers can overcome the sampling limitations of mobile research?

Some researchers provide people with the devices instead of relying on people using their own technology that they happen to have. If the sampling, coverage and reach are sufficiently a problem, it can be that you supplement the people that do have the devices required by recruiting other people you lend those devices to. It is not expensive to equip the people with the devices that are needed to conduct the surveys, especially if you're doing something like a diary survey. It may take a little bit longer to get the devices out to people, but you get the data back very quickly. That's an area where you can overcome the difficulties of sampling because your sample frame isn't of people who happen to have a particular device or an Internet-enabled contract on their phones. The device part of it actually becomes a fairly inexpensive part of the whole process. After all, the respondents are doing the data entry for you and that is a huge cost savings - that's where some of the economies come.

When designing mobile surveys, what do researchers need to remember?

The big danger - and this is the big trap with mobile - is that it cannot work in the way that people have been forcing what we call "traditional online surveys" to work. That is, with very long interviews. It just won't work. Part of the reason is because it's likely that people completing surveys may be on the move, may only have a limited amount of time and are likely to be more discriminating about the amount of time they devote to it. Nobody is going to take a 30-minute interview on a mobile device. Even if you're using a Web-style presentation, it still needs to be much shorter than what's traditionally accepted. That is a lesson the industry has failed to learn. This is something that was known and understood about Web surveys, and many people have said that traditional online research was an opportunity to ask fairly short questions and to value the respondents' time. Over the years we've seen that largely ignored.

There's no question it's the length of interviews and respondents' remembered experience of being invited to take part in these surveys that are very long and often very boring that has done the most damage to response rates. There is a danger that that then repeats itself in this new medium.

I suspect that this goes back to the relationship between the research company and their clients in that there is tremendous pressure from research buyers to max out on all surveys they do and to try to put everything in there. Nobody seems to be practicing the less-is-more principle.

There are also issues of the small format of the screen itself, which immediately puts limitations on the kind of surveys possible. That has all sorts of implications for survey design. For instance, you can't have very long lists, or if you do have long lists you have to be aware that the participant has to scroll up and down those lists and is not going to be able to see all of the items. That starts to have an effect on the kinds of responses you'll get. If you just take a survey that you're already doing by one channel, such as online, and you just make that into a small format to go on a mobile device you are likely to get different responses because the items may not be visible or not visible in the same way. You have to design the surveys to the format.

Finally, people shouldn't underestimate the extent to which respondents are willing to give verbatim text or answer open-ended questions on mobile devices. Because people are used to using the medium for text messaging and e-mailing, these days it isn't really a problem to have open-ended questions on mobile devices.

How does a respondent's "relationship"

with his/her mobile device factor into conducting a mobile study?
It's technology that a lot of respondents are quite used to using to respond in an emotional way. They're using the devices for communication, for SMS and of course phone calls, but the point is that people associate mobile phones and mobile smartphones – with communication about personal matters and using them in ways to communicate about emotional activities. [Discussing personal matters via mobile survey] is not such an alien step for respondents to take because it is a personal device. The respondent is in control of it, even more so than they might be with a desktop machine which is shared. They also might be completing a survey at work on equipment that doesn't actually belong to them. We're talking about a device that is actually in their pocket or in their handbag, and I think that gives it an advantage.

I think there seems to be some evidence to support an emotional/honest response. People who have been doing mobile research have found that respondents are very willing to be quite candid and willing to explore subjects which are quite intimate or personal.

How does a product such as an iPad fit into the mobile research scheme?
The iPad is a completely different channel and a device that just hasn't existed up until now. Is it a rather large smartphone or is it actually a desktop or a laptop being shrunk down? It is effectively a laptop that you can use in a social/domestic context in the way that laptops don't particularly sit all that naturally. Although it's obvious an iPad is a mobile device in that it doesn't tether you to a desk or a particular location, it doesn't have all of the advantages that the smartphones and the small-format mobile devices have. It's not something people are going to use on the move. You're not going to be taking the iPad in the street with you. It's difficult even to use them outside where there's sunlight; you're not likely to be able to see what's on the screen, which you usually can with a smartphone. It loses some of those advantages but perhaps has advantages as being something people will use a lot and spend a lot of time in front of.

I suspect that the iPad probably has more in common with the existing desktop and laptop partly because of the size and format of it. What it opens up is the possibility for doing more sophisticated surveys than you can hope to do on a smartphone. You can't show any complex media or stimulus material on smartphones or if you can it's very limited. With the iPad and the other devices that will come along to imitate it, you can show stimulus materials because it is all about media. The iPad is much more conducive to surveys in the way that people are used to designing them.

How can we expect developments such as the iPad to impact mobile research?
What people are learning from mobile research is that most people are participating as if they were doing a Web survey – and that is at home. So in that context, the iPad could work extremely well as a self-completion interviewing platform.

The context for the iPad is slightly different because perhaps the iPad will come to be seen as a device on which you consume content rather than being one on which you create content. The input through the on-screen keyboard is not quite as natural as it is on a PC or a laptop with a conventional keyboard. But perhaps that's a little bit overstated. The virtual keyboard certainly hasn't held people back using smartphones and SMS and effectively using an interface with only nine or 10 keys to type vast amounts of material. I suspect that that isn't going to be such a limiting factor.

Is mobile research as "mobile" as some would like to think?
It's worth bearing in mind that – most of the time – most people who participate in surveys using smartphones are doing surveys at home anyway. It's a myth to believe that when you're interviewing people using mobile devices that they're all out there in the line for the fast-food restaurant or in transit or even in the workplace. In the majority of cases, people will participate in a mobile survey when they're at home. I don't know that that's a big disadvantage; it actually shows that they have control and are taking control of the survey invitation and not feeling that they have to participate as soon as they are invited. Instead, they participate at a time that's convenient for them, and that has to be a good thing.

Do you feel like researchers are getting too excited about mobile research? Or is the excitement justified?
Some researchers are getting excited about the technology and seeing it as a way that they can differentiate what they're doing from other people, but what I actually see is a lot of researchers being rather cautious about mobile interviewing, due to coverage issues and concerns about the extent to which you can do lengthy surveys. A lot of people seem to be dismissing mobile research as being inappropriate and not really having any potential at all and that misses the point. I don't see a lot of researchers getting terribly excited about mobile research, and I think they could perhaps be a bit more excited because there are some situations where it can really improve engagement among respondents.

Are there other potential problems or problem issues that researchers should be aware of or try to avoid?
A lot of survey tools used at the moment don't really contain support for mobile devices, so you may have to use a specialized tool to do the mobile interviewing. If you do use one of the few tools that support mobile as a channel you have to pay attention to what that survey will look like.

Researchers have to be much more in touch with the process of getting the survey ready and fielding it. Some researchers are very hands-on and take a great deal of interest in what the survey looks like when it is delivered to the respondent, but that's probably the exception. Most researchers turn the design and actual deployment over to somebody else, and then they'll test it and look at it. But they're not that critical about how things are arranged on screen. Researchers have to become more critical because the screen real estate is at such a premium.

Web browsers are inconsistent on different phones and use different technologies for delivery. Within the phones themselves, once you deploy the survey to the smartphone, you can either deliver it through the Web interface that the smartphone has on it or you can deliver it through a captive application. Some survey software packages just support Web browsers whereas others are building their own applets that will run the survey in a captive sense on the device. Of course, that gives much more control over how it appears.

The captive application then depends on getting the respondents to agree to downloading that application to their smartphone. They're not necessarily going to be reluctant to do that, and if you're reaching them through a panel they'll probably be reasonably willing to do that. Additionally, one of the interesting little things that seems to be emerging is the number of people who are already doing Web surveys on handheld devices. If you deploy a Web survey it's likely that you'll find maybe 1 percent or 2 percent of participants possibly already taking it on a smartphone or an iPhone. That number is likely to grow. People have to think quite hard about how to treat that.

How can mobile research complement/supplement existing methods?

As a complementary research method, it's also worth remembering that a lot of people who have mobile devices will also have access to the Internet. So with some studies, you can play to the strength of both of those channels by doing a hybrid survey, where some of the initial parts of the survey you would do using a conventional desktop or laptop machine and then you would go to the mobile part.

What kind of respondent feedback can mobile researchers expect?

It could be a halo effect because taking mobile surveys is something new and different, but researchers are reporting that if respondents are recruited into mobile research they tend to respond very favorably when asked about it afterward. Some panel providers have been keeping information about whether respondents do have mobile phones; whether they're Web-enabled mobile phones; and whether they're willing to be interviewed on their mobile phones. The panel providers aren't necessarily seeing a huge demand yet from clients to use the panels in that way, but when they do surveys like this the respondents really rather like them. That indicates that as a method of engagement it has a lot going for it. But again, that could just be a transitory experience with the novelty of it, which could wear off in time. | Q

continued from p. 8

associated, once someone is online, with a greater likelihood to access user-generated health content, such as blog posts, hospital reviews, doctor reviews and podcasts. These resources allow an Internet user to dive deeply into a health topic, using the Internet as a communications tool, not simply an information vending machine. For more information visit www.pewinternet.org.

Low prices replace customer service as top driver of customer loyalty

Walmart dominated the 2010 Retail Loyalty Index conducted by Cincinnati marketing company Colloquy, suggesting that low prices are a driving force in customer loyalty. The 2010 results are perhaps a product of the Great Recession, as the importance of low price was not evident in Colloquy's 2008 Retail Loyalty Index. Customers claimed the highest loyalty to Walmart in many of the grocery, personal care and department store regional categories. Costco had the highest customer loyalty ratings in three out of five mass-merchant regional categories.

"Our 2008 index showed that loyalty marketers worked within a significantly different retail landscape. Customer service, store environment and a wide product selection were the underlying factors for customers' self-professed loyalty. But our 2010 index proves that the Great Recession became the great equalizer," says Colloquy partner Kelly Hlavinka. "Low prices have stepped up to become retail's strongest loyalty lure according to consumers. That is something which was simply not true in 2008."

While Walmart clearly dominated most retail categories, other chains - including Kroger and Walgreens - did climb up the loyalty chart or make their first appearances, edging out 2008 loyalty leaders. Here are the highlights by category:

Kroger was the loyalty leader in the Midwest. In the Southeast, Publix moved up to first place from its second-place showing in 2008. In the Southwest, regional grocer H-E-B ranked first with similar messaging to Walmart.

But the highly-fragmented grocery sector, where neither conventional nor discount grocers operate in every state, holds certain advantages for Walmart. Walmart's message of low prices and value resonates with customers - and its ability to deliver on that promise by leveraging its broad distribution network translated to first-place consumer loyalty ratings for Walmart in the Northeast and Northwest and third-place finishes in the Southeast, Southwest and the Midwest.

In the Southeast, Walgreens finished in a dead heat with Walmart for the top loyalty ranking, with CVS and Publix tied for second. In a tight three-way race in the Midwest, Walgreens and CVS edged out Walmart, even though CVS hadn't been among the top five in 2008. Walmart easily won the Northwest, maintained the top spot in the Southwest and finished ahead of CVS and Rite Aid in the Northeast.

The regional chains BJ's Wholesale and Meijer replaced familiar names such as Sears, Sam's Club and Big Lots for top loyalty rankings in the Northeast and Midwest markets (respectively). Costco continued to rank first in all other U.S. regions. Walmart, meanwhile, came in second in all but the Southeast, where it ranked third behind Target, which rated third in the rest of the country. For more information visit www.colloquy.com.

Regardless of geography, green-appliance owners more active and healthy

The government's Cash for Appliances program is underway, and consumers across the country are taking advantage of rebates by turning in their older appliances for newer, more energy-efficient ones. From the tundra of the Midwest to the heat waves in Hawaii, these green-conscious consumers have more in common than one might think.

According to Scarborough Research, New York, the leading cities for green appliance households are Honolulu; Green Bay, Wis.; Portland, Ore.; and San Francisco. Forty percent of households in Honolulu and Green

Bay have energy-saving appliances, as do 39 percent of those in Portland and 38 percent of those in San Francisco. Nationally, about one-third of households currently have a green appliance.

Energy-saving appliance owners apply green-living techniques to other areas of their lives. They are 31 percent more likely to eat organic food and also enjoy outdoor activities such as running, biking, hiking, camping and fishing. Energy-saving appliance owners are 21 percent more likely to garden.

In fact, a love of the outdoors is a common trait across all of the top local markets for green appliance owners. Green Bay and Portland adults are more likely to enjoy biking, whereas those in Honolulu and San Francisco prefer jogging - but all are active adults. One leisure activity these cities have in common is hiking - they are all more likely than total adults to enjoy this activity.

Demographically, energy-saving appliance owners tend to be married and have children. Adults who live in a household that currently owns a green appliance are 10 percent more likely than average to have two or more children and 14 percent more likely to be married. While they cross all ages, energy-saving appliance owners are 12 percent more likely to be Generation Xers (ages 30-44). For more information visit www.scarborough.com.

Store-brand items seen as equal to name-brand where it counts

Consumers from around the world feel strongly that store brands are the same as, or better than, national brands at providing a variety of benefits. While store brands have built their foundation on distinguishing themselves as a good value in terms of low cost, a study from New York research company Ipsos Marketing suggests that consumers believe store brands provide much more than that.

At least 80 percent of global consumers indicated that store brands are the same as or better than national brands on many dimensions, most notably meeting their needs, offering convenience, being good for their families, caring about the environment and exuding trust. "The brand experience associated with store brands is matching the brand experience associated with national brands - and that is very alarming for national consumer packaged goods marketers," says Gill Aitchison, president, global shopper and retail research, Ipsos Marketing.

The study further indicates that global consumers are confident that store brands perform just as well as national brands: 81 percent say that store brands offer food products that taste as good and home products that work as well as national brands. The notion that store brands offer a sub-optimal product experience - the trade-off for lower price - seems to be fading in consumers' minds.

Other findings indicate consumers believe store brands perform as well or better than national brands in providing a good value for the money (89 percent); offering products that meet my needs (87 percent); offering convenient products (87 percent); offering products that are good for the family (86 percent); offering products my family requests (83 percent), offering environmentally-friendly products (82 percent); offering food products that taste good (81 percent); offering home products that work well (81 percent); offering products I trust (80 percent); offering high-quality products (73 percent); offering unique products (69 percent); offering innovative products (69 percent); and having appealing packaging (65 percent).

On which benefits should national brands focus? "The data from our survey suggests that national brands' greatest strengths vs. store brands are packaging, innovation, uniqueness and quality. These are important facets of the brand experience, and ones that manufacturers should consider in their brand strategy," says Aitchison. For more information visit www.ipsosmarketing.com.

Social networking and the Net soar in popularity and importance

The percentage of Americans age 12+ who have a profile on one or more social networking Web sites has reached almost half of the population - double the level from two years ago (24 percent in 2008), according to a national survey from Columbia, Md., research company Arbitron Inc. and Edison Research, Somerville, N.J.

Additionally, consumer use of social networking sites is not just a youth phenomenon. While nearly eight in 10 teens and 18-to-24-year-olds (77 percent) have personal profile pages, 65 percent of 25-to-34-year-olds and half of those ages 35-44 also have personal profile pages. The study also shows that 30 percent of Americans age 12+ who have a profile on at least one social networking Web site use those sites several times a day, compared with only 18 percent one year ago.

And it isn't only social networking that has picked up. The Internet as a whole has surpassed TV as the most-essential medium in Americans' lives. For the first time ever, more Americans say the Internet is most essential to their lives when given a choice along with television, radio and newspapers. Forty-two percent chose the Internet as most essential, with 37 percent selecting television, 14 percent choosing radio and 5 percent choosing newspapers. While television still leads among those over the age of 45, Internet dominates among those ages 12-44. For more information visit www.arbitron.com or www.edisonresearch.com.

U.S. vacationers again packing their bags

Leisure travel is picking up and U.S. travelers are once again on the move, with more Americans migrating south to Florida than any other destination. Over 63 percent of people indicated that they had already taken at least one trip in 2010 and over 77 percent indicated that they will take two or more leisure trips through the remainder of the year, according to a survey conducted by Minneapolis travel agency Travel Leaders.

Nearly 43 percent indicated they would be taking three or more leisure trips throughout the remainder of 2010. Only 4.3 percent indicated they would not be taking any leisure trips.

When asked which U.S. state(s) they have traveled to or will you travel to in 2010, the top response was Florida (42.2 percent) over California (27.3 percent). For more information visit www.travelleaders.com.

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unfiltered product experience in real time to influence a community of potential buyers. For more information visit www.tns.com.

Clarabridge Self Service puts text analytics in the hands of researchers

Reston, Va., research software company Clarabridge Inc., has released Clarabridge Self Service for general availability after a beta period. The software offering is designed to allow 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 drilling down to the original text to understand areas of interest. Pricing starts at 15 cents per verbatim and changes based on the number of seats. For more information visit www.clarabridge.com/selfservice.

Cint Direct Sample tool plugs in to simplified interviewing

Stockholm, Sweden, research company Cint has released Cint Direct Sample to provide direct online access to worldwide panels of consumers. Cint Direct Sample is designed to eliminate the need to pay research agencies or go through a manual process to get a sample to interview.

Cint Direct Sample is a plug-in that can be installed on any third-party software, such as Survey Pirate and Relationwise, and can be accessed online at any time from anywhere and offers access to panels of over 2.5 million people in 26 global markets.

The desired demographic market can be selected by age, gender, region, occupation and education. To purchase sample, online researchers using a survey tool can specify the country or target group they want to research, receive a quote instantly and then select "buy" to place the order. The sample is drawn automatically from available panels. After Cint checks the survey specifications and questionnaire for language and logic, it is sent out. Responses are received in a matter of days. There are no minimum fees or project management fees; the user only pays for completed interviews.

The interface language for version 1.0 is English, but Spanish, French, German and Scandinavian language versions are planned. Future versions of Cint Direct Sample will have fixed target groups to select by additional variables including car ownership, mothers of babies and business decision makers. For more information visit www.cint.com/cds.

Kantar Health rolls out Positioning Wheel

Kantar Health, New York, has debuted its refined global positioning framework - an approach intended to help clients build optimal positionings that serve as the foundation for their products' marketing strategy. At the center of this framework is the Kantar Health Positioning Wheel, which considers the essential components of strong positioning: customer target; competitive context/frame of reference; brand promise; brand character/personality; and aspirational strategy.

Organizational and team strategy alignment workshops and the use of qualitative and quantitative methodologies aim to help uncover the market's white space and the customers' functional and emotional needs that direct positioning opportunities. For more information visit www.kantarhealth.com.

Triple-S delivers compliance software tool

The Triple-S Group has launched an online validation suite designed to test that all research exports fully comply with the standard. The validation suite will be available for use on the Triple-S Web site, and users will be able to submit an export document and either receive confirmation that the export conforms to the standard or a list of messages indicating where any document faults lie.

The program has been funded through sponsorship from five research companies: The GfK Group, Ipsos MORI, Kantar, Synovate and TNS. For more information visit www.triple-s.org.

Remark launches version 5.1 of Web Survey platform

Malvern, Pa., research software company Gravic Inc. has released version 5.1 of its Remark Web Survey product. Updates include improved query parameters designed to allow users to send respondents one e-mail with multiple links to a survey, based on each respondent's information; an advanced hyperlink builder designed to build URLs with answer piping and query parameters; the ability to pipe extra fields from a login page; and several smaller features including a Web browser preview, filling in appended "other" text boxes by default, saving the subject line along with e-mail templates, hiding questions in question tables, automatically giving restricted users rights to the forms they publish, using answer piping for text box default fills and Windows 7 support. For more information visit www.gravic.com/remark/websurvey.

Crowd Science unveils Campaign Profiler

Crowd Science, a Mountain View, Calif., research company, has launched Campaign Profiler, a tool intended to allow publishers, advertisers, agencies and ad networks to perform unlimited numbers of campaign research studies for a flat fee of $5,000 per month. The offering is available in three levels of functionality: touch, a self-service app designed to determine if a campaign has reached its intended audience; recall, a self-service app with the added capability of test-control methodology to assess basic brand metrics of recall, usage and loyalty; and impact, a full-service offering that adds advanced measurement tools, including creative and message recall, brand testing and attribute testing.

The Campaign Profiler also includes integration of test/control survey methodology endorsed by the Interactive Advertising Bureau and Advertising Research Foundation; SmartSample; SmartInvite; SmartControl; survey coverage in Flash environments; a standardized core questionnaire; custom question collection; real-time reporting via an online dashboard; and detailed reporting by date, day-part and all audience profile parameters (demographics, online behaviors, etc.). For more information visit www.crowdscience.com.

Neuromarketing measurement tool debuts

San Francisco research company EmSense has launched EmBand 24, a neuromarketing measurement headset designed for using electroencephalography in market research. The headset uses 24 EEG sensors, each measuring at 20,000 times per second and collecting 480,000 measurements per second. In addition, the EmBand 24 provides a signal-to-noise ratio in real-world, in-context conditions.

The EmBand 24 aims to deliver increased measurement in the key decision center area of the frontal lobes, as well as added measurements, such as visual attention from sensing additional areas of the brain. For more information visit www.emsense.com.

Briefly

Dallas research company Toluna has expanded its community portal feature on Toluna.com for panelists in 15 additional countries: Chile, Argentina, Mexico, Peru, China, Denmark, Finland, Czech Republic, Japan, Sweden, Singapore, Portugal, Norway, Greece and Brazil. The community portal feature is designed to encourage panelist interaction and respondent engagement. For more information visit www.toluna-group.com.

Quester, an Ankeny, Iowa, research company, has introduced its application programming interface (API) for Socrates, the company's automated online interviewing software. The API is intended to allow companies to design their own interface to conduct conversations using Socrates technology. For more information visit www.quester.com.

Colorado Springs, Colo., research company IntelliClear has created nine technology research panels. Powered by Luth Research, San Diego, the panels include IT decision makers and consumers, totaling hundreds of thousands of potential respondents in North America, with international expansion planned. For more information visit www.intelliclear.com.

Research Now, London, has launched its B2B and affluent consumer online research panel in Spain. The panel announcement follows the opening of the Research Now office in Madrid, Spain. For more information visit www.researchnow.co.uk.

Tokyo research company AIP Corporation has launched its proprietary, research-only online panels in India and Vietnam. The panels are designed to explore the affluent middle-class in emerging Asian markets. For more information visit www.asia-info.com/global.

Research Panel Korea Inc., a Seoul, South Korea, division of Research Panel Asia Inc., Tokyo, has launched its service site Panel Now (www.panelnow.co.kr) to build a new online research panel in South Korea. Respondents will be rewarded 100-3,000 Panel Now Points, which are convertible into cash. Collaborating with Interpark, an online Korean shopping mall, the points are also exchangeable to I-Points (Interpark's original point system). For more information visit www.researchpanelasia.com.

Webtrends, a Portland, Ore., research company, has added full segmentation capabilities to its Webtrends Visitor Data Mart product. Webtrends Segments is an add-on intended to profile individual customers and improve conversion rates and marketing campaign effectiveness. For more information visit www.webtrends.com.

MarketResearch.com, Rockville, Md., has added The 2010 Healthcare Business Market Research Handbook - 14th Edition to its collection of reports.

London research company Conquest has launched InfeXious, a tool designed to measure the viral potential of ads by tracing and examining the mechanics of mob-inspired "contagion" and spotting and explaining new ads capable of spreading viral "brand contagion." Virality is broken down in to its component parts: buzz, belonging, attraction, dynamism and numinosity/awe. For more information visit www.conquestuk.com.

Reston, Va., research company comScore Inc. has launched its comScore Video Metrix measurement platform in the Asia-Pacific marketplace, including Australia, China, Hong Kong, Japan, Malaysia and Singapore. For more information visit www.comscore.com.

New York research company Envirosell has launched Behind the Counter, a service focused on transactional and non-transactional behavior and activity within commercial environments. The goal of the service is to determine retail areas that can be streamlined, including staff time management, staff modeling, multitasking assessment, physical environment issues and customer visual perspective operations. For more information visit www.envirosell.com.

Usability Sciences Corporation, an Irving, Texas, research company, has launched WebIQ Pharma, a survey solution intended to provide pharmaceutical sites with metrics to answer questions about site and content effectiveness. For more information visit www.usabilitysciences.com.

Marketing Services Limited, Lagos, Nigeria, have entered into an agreement to provide customized research for West Africa.

New York researcher **The Nielsen Company** and **Openwave Systems Inc.**, a Redwood City, Calif., software company, have collaborated to develop a mobile insight engine intended to mine mobile data to generate content recommendations. The insight engine will combine features of the Openwave Analytics platform and Nielsen's PRIZM consumer segmentation system.

Additionally, Beijing online video site **Youku** and Nielsen's China division **CR-Nielsen** have partnered to perform third-party auditing on all in-video (pre- and post-roll) advertisements on Youku. The venture is intended to promote transparent data for advertisers.

International Data Corporation, a Framingham, Mass., research company, has partnered with Monaco business information company **naseba Group** to collaborate on research, production and selling a series of events in the Asia-Pacific region.

Beaverton, Ore., research technology company **Digimarc Corporation** and Columbia, Md., research company **Arbitron Inc.** have entered into a collaborative licensing arrangement, contingent upon payment of $4.5 million from Arbitron. Arbitron will receive a non-exclusive, worldwide and irrevocable license to a substantial portion of Digimarc's domestic and international patent portfolio (including related future and pending patent applications).

Maxus, a New York media division of London research company WPP's GroupM, has formed a strategic alliance with **BPG Media**, Dubai, United Arab Emirates, to establish a presence in the Middle East and North Africa. Called BPG Maxus, the collaboration aims to offer clients analytics, digital communications, strategic planning and media-buying services.

Florida mystery shopping companies **Hindsight** and **Simon Survey** have merged.

New York digital advertising measurement companies **KN Dimestore** and **[x+1]** have partnered to create a tool to enhance online ad campaign performance by adjusting offers and media based on real-time consumer feedback. The solution is designed to gauge consumer attitudes like purchase intent, brand or product recognition and message recall.

The NPD Group, Port Washington, N.Y., has merged with Scottsdale, Ariz., research company **In-Stat**. In-Stat's analysis of mobile Internet and digital entertainment will be used with NPD's consumer tracking services.

Minneapolis research company **Iconoculture Inc.** has partnered with Norrköping, Sweden, research company **Dapresy** to integrate quantitative consumer information into its research and advisory services and provide Iconoculture's clients access to global consumers. Dapresy's reporting technology will power the data.

South San Francisco media company **Future US** and New York research company **Ipsos OTX MediaCT** have entered into a strategic alliance to create **GamePlan Core**, a consumer research tool game marketers can use to gauge consumer interest in video games. GamePlan Core will integrate data about users' behavior and interests from Future's online properties with other marketplace data captured by Ipsos OTX MediaCT, U.S. GamePlan Insights, a weekly syndicated tracking study.

Awards/rankings

London research company **E-Tabs** has received a Queen's Award for Enterprise. The award was granted for innovation and recognizes its performance and commercial success as outstanding.

Chicago research company **GeeYee** has received a 2010 Great Mind Award for Innovation from the **Advertising Research Foundation** (ARF), New York.

Separately, the ARF has named **Shelley Zalis**, founder and CEO of Los Angeles research company OTX, winner of the 2010 Grand Prize Award for Innovation.

In addition, the ARF awarded **Walmart**, Bentonville, Ark., two David Ogilvy Awards for Excellence in Advertising Research. Walmart's Hispanic Heritage Month campaign received the gold medal in the multicultural campaign category, and the Winning With Mom During the Great Recession campaign received the silver medal in the retail/e-tail category.

MarketResearchCareers.com, New York, has placed New York research company **Ipsos North America** first in its client satisfaction index. The site surveyed U.S. purchasers of market research services and asked for comment on supplier satisfaction over the past year.

Ladd Research Group, Cincinnati, has awarded **Mary Spooner**, a junior at Miami University, a $1,000 college scholarship.

New accounts/projects

Portland, Ore., research company **Webtrends** has been chosen by Mountain View, Calif., software company **Mozilla** to supply Web measurement analytics and track usage and activity on its main Web sites.

Additionally, **Facebook**, San Francisco, has selected the Webtrends Optimize platform to increase the effectiveness of marketing campaigns.

Shelton, Conn., research company **TABS Group** has extended its contract with Rotterdam, Netherlands, consumer packaged goods company **Unilever**. Terms of the deal were not disclosed.

The 2010 Out Now Global LGBT Market Study from **Out Now Consulting**, the Netherlands, has expanded to include both the U.S. and Canada. **Gay Ad Network**, Los Angeles, has been selected as the exclusive partner to bring the market study to the U.S. and Canadian markets.

China panel company **DXY** has granted **MDLinx**, a Washington, D.C., research company, exclusive access to DXY's physician panel for international pharmaceutical market research. DXY will provide the verified panel and in-country project management, and MDLinx will provide its technology and PRC-certified staff.

Stamford, Conn., research company **InsightExpress** has been named a flagship partner in the Open Insights initiative of the New York marketing services company **PointRoll**. Open Insights is a partner program designed to bring science to advertising by helping marketers use data to inform and improve creative campaigns.

New York researcher **The Nielsen Company** has launched television audience measurement in Puerto Rico. Ratings are being collected from a sample of 500 homes chosen through Nielsen's sampling to represent all demographics and regions of Puerto Rico.

New companies/new divisions/relocations/expansions

San Mateo, Calif., research company **AlphaDetail** has launched its RapidRecruit division, an independent fielding organization intended to provide clients end-to-end fieldwork management in the health care research market. The firm is online at www.rapidrecruit.com.

Pulse Group PLC, Kuala Lumpur, Malaysia, has launched its health care and automotive practice. The divisions include specialty online panels, CATI expertise and full-service offerings throughout Asia.

Former Wirthlin Worldwide executives have founded **Heart+Mind Strategies**, a Washington, D.C., research company. Dee Allsop will serve as CEO and managing partner; Michael Dabadie as president and managing partner; Beth Strackbein Forbes as partner and chief of staff/operations; Jennifer Airey as partner, senior solutions strategist; and Jim Hoskins as senior consultant and executive advisor. The firm is online at www.heartandmindstrategies.com.

London research company **Munro Global** has opened Munro Analytics to provide analysis for clients within a strict quality and security code.

New York research company **WorldOne Inc.** has opened its North American headquarters at 200 Park Ave. South, Suite 1301, New York, 10003. The firm can be reached at 212-358-0800.

Naperville, Ill., research company **Millward Brown** has launched a neuroscience research practice, which will integrate neuroscience techniques into the company's existing research offers and develop new neuroscience informed solutions.

Vickie Abrahamson and Mary Meehan, co-founders of Minneapolis research firm **Iconoculture Inc.**, have opened **Panoramix Global**, a market research firm with a lens on the G-20 consumer. The firm is online at www.panoramixglobal.com.

Former Synovate researcher Neil Gains has launched **Tapestry Works**, a Singapore market research consultancy to service clients across Asia. The company is online at www.tapestryworks.asia.

Research Panel Asia Inc., Tokyo, has established its local subsidiary, **Research Panel Korea Inc.**, in Seoul, South Korea.

Alexis Research Corporation has opened its corporate headquarters in North Wales, Pa., and can be reached at 215-260-1625 or at www.alexisresearch.com.

Jim Miller has opened **Business Intelligence Online LLC**, a research company located at 311 South Arlington Heights Rd., Suite 40, Arlington Heights, Ill., 60005. The company can be reached at 847-342-1135 or at www.bizintellonline.com.

Brand Amplitude, a Stevensville, Mich., research company, has launched a Millennial marketing unit dedicated to developing marketing programs to engage Gen Y consumers. Carol Phillips will lead the unit.

Research company earnings/ financial news

Vision Critical, Vancouver, B.C., has announced plans to double its investment in technology for 2010 and, in conjunction with this effort, launch five new products.

The GfK Group, Nuremberg, Germany, achieved an operating margin of 12.6 percent in 2009, which was close to the prior year's margin of 13 percent. With sales of 1,164.5 million euros, GfK achieved the adjusted forecast given in its 2009 half-year report. Overall, sales declined by 4.6 percent. Adjusted operating income declined by 11.5 million euros to 147.2 million euros.

Gongos Research, Auburn Hills, Mich., has endeavored in 2010 to double its revenues derived from ConsumerView, the company's Webcam-based qualitative research ($225,000 in 2009).

calendar of events

The ARF will hold a conference, themed "Audience Measurement 5.0," on **June 15-16** at The New York Marriott Marquis Hotel. 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, Olympia, in London. For more information visit www.insightshow.co.uk.

DMG World Media will present the ad:tech London exhibition conference, themed "Think Strategy, Not Just Technology!" on **September 21-22** at National Hall, Olympia, in London. For more information visit www.ad-tech.com/london/adtech_london.aspx.

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.

The American Marketing Association will hold its annual marketing research conference on **September 26-29** at at the Hilton Atlanta. For more information visit www.marketingpower.com.

Sawtooth Software will hold its annual research conference on **October 6-8** at the The Newport Beach Marriott in Newport Beach, Calif. For more information visit www.sawtoothsoftware.com.

CASRO will hold its annual conference on **October 11-14** at the Four Seasons Resort Aviara in North San Diego, Calif. For more information visit www.casro.org.

The Qualitative Research Consultants Association will hold its annual conference on **October 13-15** in Philadelphia. For more information visit www.qrca.org.

The Life Insurance and Market Research Association will hold its annual meeting **October 24-26** at Gaylord National Hotel and Convention Center on the Potomac in Maryland/Washington, D.C. For more information visit www.limra.com.

PMRG will hold its annual meeting of The PMRG Institute on **October 24-26** at the Westin Boston Waterfront. For more information visit www.pmrg.org.

Geoscape will hold its annual multicultural marketing summit on **October 27-29** in Miami. For more information visit www.geoscape.com/welcome-letter.aspx.

The Marketing Research Association will hold its First Outlook and Expo conference on **November 2-4** at the Walt Disney World Swan in Orlando, Fla. For more information visit www.mra-net.org.

IIR will hold its annual conference, "The Market Research Event 2010," on **November 8-10** at the Hilton Bayfront in San Diego. Use code TMRE09QUIRK when registering to save 15 percent off standard rates. For more information visit www.iirusa.com.

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

index of advertisers

By Joseph Rydholm
Quirk's editor

Report shows the changing face of motherhood

Data from a nationwide Pew Research Center survey and information from the National Center for Health Statistics and the Census Bureau show that today's mothers of newborns are older, better educated, less likely to be white and less likely to be married than their counterparts were in 1990.

There were more births to teenagers in 1990 than to women ages 35 and older. By 2008 (the latest date for which data is available), things had changed: 14 percent of births were to older women and 10 percent were to teens. Across all major race and ethnic groups, the rate of births to women ages 35 and older grew 64 percent between 1990 and 2008.

Also released as part of a report (The New Demography of American Motherhood) on the above findings were results from a 2009 Pew survey on attitudes toward these and other birth-related trends. The data were taken from a nationally representative sample of 1,003 adults that included parents, people who intend to become parents and people who do not intend to have children.

As taken from the Pew report, some of the main findings of the survey on fertility attitudes and trends include:

- 35 percent of parents cited the reason "It wasn't a decision; it just happened" as very important and 12 percent as somewhat important in the decision to have their first or only child.
- Women (51 percent) were somewhat more likely than men (42 percent) to say that "it just happened" was somewhat or very important.
- Forty-six percent said two children was the ideal number for a family; 26 percent said three; 9 percent said four; and 3 percent each said zero, one or five or more. Among parents of three or more children, 33 percent said two was ideal.
- Nearly two-thirds of Americans (65 percent) said the growing number of single women having babies is bad for society. Only a minority disapproved of more women having babies after age 40 (33 percent), more women undergoing fertility treatment in order to have a baby (28 percent) and more women not ever having children (38 percent).
- Most adults said they knew at least one woman who had a baby while she was not married and one man who fathered a child while he was not married. A third said they knew a woman who had fertility treatment in order to get pregnant.

Population changes

In their report on the results, Pew Researchers Gretchen Livingston and D'Vera Cohn discussed some of the factors related to the findings. They identified population changes as key factors influencing birth patterns in recent decades. There are fewer women in the prime childbearing years now than in 1990, as the youngest Baby Boomers have aged into their mid-40s. But changes in the race and ethnic makeup of young women – mainly, the growth of the Hispanic population, which has higher birth rates than other groups – have helped keep birth numbers relatively level.

Another influence on births cited by the researchers is the nation's growing number of immigrants, who tend to have higher birth rates than the native-born (although those rates have declined in recent years). The share of births to foreign-born mothers – 15 percent of U.S. births in 1990 – has grown at least 60 percent through 2004. Births to foreign-born women in 2004 accounted for the majority of Hispanic (61 percent) and Asian (83 percent) births.

According to Pew Research Center population projections, 82 percent of the nation's population growth through 2050 will be accounted for by immigrants who arrived in the U.S. after 2005 and their descendants, assuming current trends continue. Of the 142 million people added to the population from 2005 to 2050, the projections say, 50 million will be the children or grandchildren of new immigrants.

According to the findings, the average age for U.S. mothers who had their first baby in 2008 was 25, a year older than the average first-time mother in 1990. Among all women who had a baby in 2008, the average age is 27, up from 26 in 1990. The prime childbearing years remain 20-34 - three-quarters of mothers of newborns are in this age range. Birth rates peak among women in their late 20s.

Since 1990, birth rates have risen for all women ages 30 and older. Although in some cases the number of births is small, the rate increases have been sharpest for women in the oldest age groups - 47 percent for women ages 35-39 and 80 percent for women ages 40-44, for example.

Dual factors

The delay in age of motherhood is associated with delay in age of marriage and with growing educational attainment, the report notes. The more education a woman has, the later she tends to marry and have children. Birth rates also have risen for the most-educated women - those with at least some college education - while staying relatively stable for women with less education. These dual factors have worked together to increase the education levels of mothers of newborns.

Among mothers under age 50 and fathers under age 60, 82 percent say they plan to have no more children. When those parents, as well as parents beyond the childbearing ages, were asked why they decided to limit the number of children they had, the only reason cited as "very important" by most parents (64 percent) was that they wanted to devote time to the children they already had. A total of 76 percent described this reason as very important or somewhat important. A total of 72 percent said the cost of having another child was very or somewhat important to them in deciding to limit their family size.

Cited by smaller groups of respondents as very or somewhat important were the stress of raising children (49 percent), the wishes of their spouse or partner for no more children (46 percent), their age (42 percent) and wanting to have time for other interests (40 percent).

The genders offered different responses about stress, money and the wishes of a spouse or partner, the authors noted. Women (56 percent) were more likely than men (40 percent) to cite the stress of raising children as a very or somewhat important factor in their decision to limit family size. Men and women were about equally likely to say that financial concerns were somewhat to very important; a higher number of women (52 percent) than men (44 percent) said money issues were very important. A spouse or partner's wishes were cited as very important by 33 percent of men but only 23 percent of women.

Adults who completed high school were more likely than college grads to cite stress and having the time to pursue their own interests as reasons for not having more children. Stress was cited as very important by 35 percent of adults with a high-school education or less and 23 percent of college graduates. Time for their own interests was cited as very important by 25 percent of adults with a high-school education or less and 12 percent of college graduates. Time to pursue their own interests also was cited as a very important reason by a higher share of Americans with household incomes under $30,000 (29 percent) than by those with household incomes of $75,000 or more (13 percent).

Younger parents and unmarried parents were more likely than older or married parents to cite the cost of raising children as a very important reason for limiting their family size. Sixty-eight percent of parents in their 20s and 30s did so, compared with 44 percent of parents ages 40-59 and 43 percent of those ages 60 and older. More than half of unmarried parents (55 percent) cited this reason as very important, compared with 45 percent of married parents.

The New Demography of American Motherhood can be downloaded free of charge at http://pewresearch.org. | Q

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Year two of our annual salary survey finds researchers busier than ever before but still claiming to have high satisfaction levels with their jobs.

Researchers, take more risks

Brett Hagins looks at 3M's guidelines for how its internal research function can take risks and achieve excellence.

before you go...

online and offline

News about Quirk's and quirks.com

Survey says: 2010 to get things moving in the research industry

Thinking of a career change? 2010 just might hold some promise for those looking to enter or move around within the marketing research industry. According to Quirk's 2010 employment/salary survey, 21 percent of respondents at client-side companies and a whopping 47 percent of provider-side companies indicated that their firm is likely or very likely to hire additional market researchers in 2010. Full results from the second-annual salary survey will appear in the July 2010 issue of *Quirk's*!

Read on the go - get Quirk's on your iPad

Quirk's digital PDF is compatible with and readable on Apple's iPad without any additional applications – just open it up from Quirk's home page (current cover image is linked) and start reading! The magazine-on-the-go experience, however, can be enhanced by downloading the GoodReader app produced by Good.iWare Ltd. In regard to Quirk's, the app enables the PDF hyperlink feature, which allows jumping back and forth using links within the document. Tapping a link will whisk you across the entire PDF issue in an instant. GoodReader is available from the iTunes store for $0.99.

Visit us at the AMA's first-ever virtual conference

Quirk's has partnered with the American Marketing Association in hosting a virtual conference on June 23. Themed "Unveiling Marketing Research's Future Online," the event is a free full day of online presentations, Q&A sessions, networking and exhibits – all "attended" from the comfort of your own office. And while you're there, stop by and visit the Quirk's booth! For more information and to register visit www.marketingpower.com/calendar/pages/marketingresearchvirtualevent.aspx.

cover-to-cover

Facts, figures and insights from this month's issue

When other demographic factors are held constant, having a chronic disease significantly increases an Internet user's likelihood to say they keep a blog or contribute to online discussions, a listserv or other online group forums that help people with personal issues or health problems. *(page 8)*

Allowing "don't' know" has at least three important drawbacks. First, it allows less-diligent consumers an easy out by allowing them to essentially avoid the question. Second, it complicates analysis by permitting missing data. And third, we fail to collect data on beliefs that are weakly held but may nevertheless affect behaviors of interest. *(page 22)*

Archetype cards were used to examine the ways respondents define themselves and their relationships. With this knowledge, a researcher gains perspective on how the respondent approaches products and services, whether they are early- or late-adopters, how their relationships influence behavior, etc. *(page 32)*

Think of the Web site as a platform that showcases brand equity. To quickly define the Web equity concept, it is messaging that can be built and established through Web site content. The Web site can do a brand justice or injustice depending on how its utilized. *(page 41)*

>>> Enter to win!

Five different winners will receive a copy of Kathryn Korostoff's book *How to Hire & Manage Market Research Agencies*!

This book will be a useful resource if you are in any of the following situations:

> You have never done custom market research before, and you've been tasked with hiring and managing a research agency for the first time.

> You have previously hired market research agencies and been dissatisfied with the results.

> You have managed one or two projects with market research agency partners, but the results were not embraced by your internal clients/stakeholders.

Korostoff identifies the steps to take before hiring an agency, while engaged with an agency and at project conclusion - all with an eye on maximizing the return you will get from your market research investment.

For more information visit www.researchrockstar.com.

To register, send an e-mail to contest@quirks.com with your complete contact information. Please include "Book Contest" in the subject line. Deadline to enter is June 30, 2010. The winner will be selected at random and announced in the August issue of *Quirk's*.

Congratulations to April's winner, Katie E. Clark of Diversified Business Communications, Portland, Maine. The winner received an all-access pass to The Market Research Event 2010.