

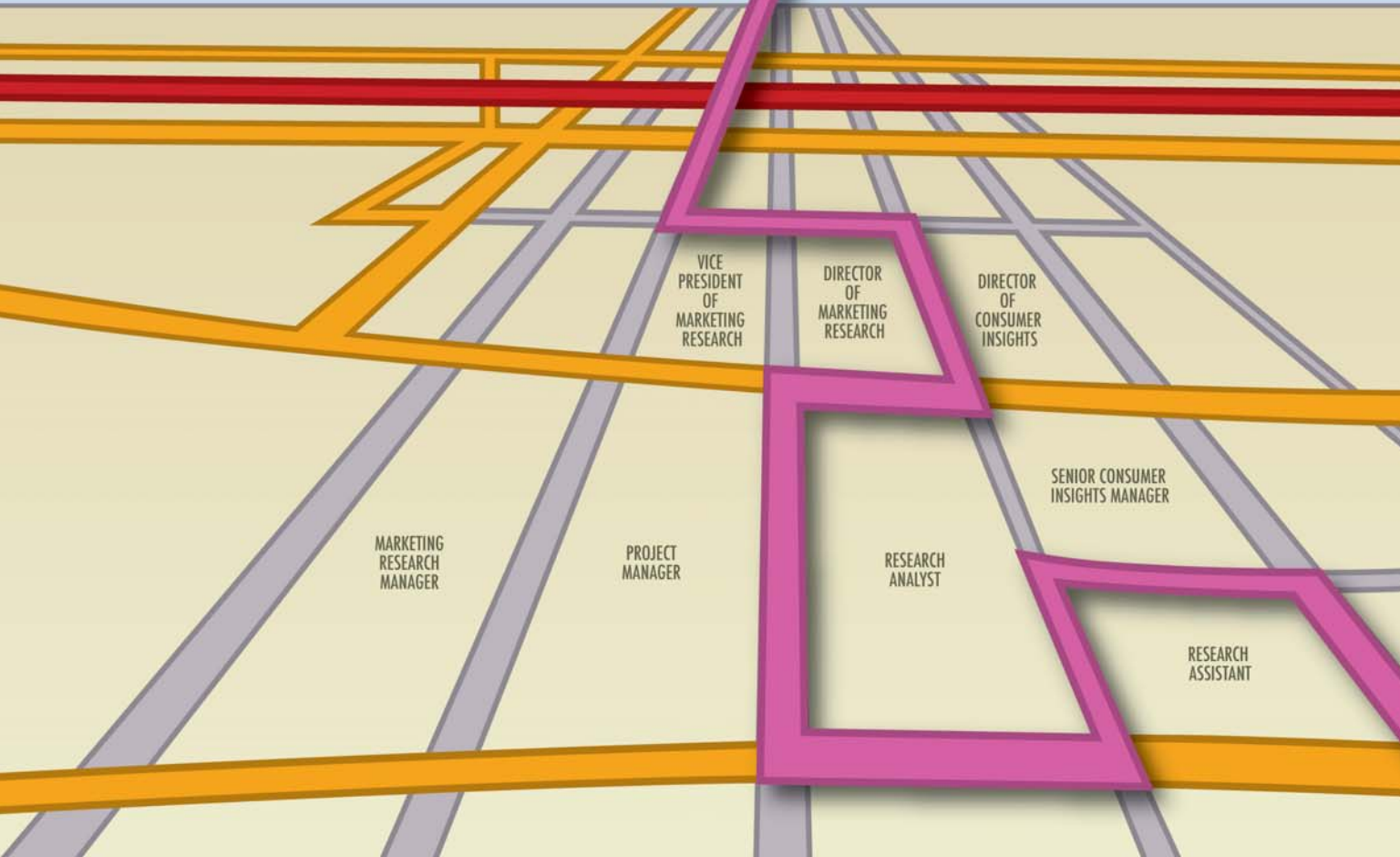
QUIRK'S

Marketing Research Review

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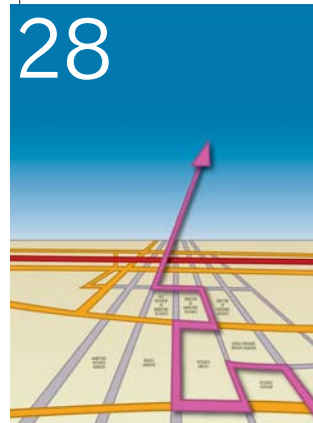


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in case you missed it...

news and notes on marketing and research



New algorithm could help detect sarcasm in user responses

Sarcasm is a language tool most people have used in daily life to convey their emotions and attitudes, but it can be extremely hard to pick up on – and easy to misinterpret – in written form, namely product reviews and survey responses. As a result, sarcasm is often left out of the written word even though it's a natural tool of expression.

Researchers at The Hebrew University, Jerusalem, may have found the solution. After an exhaustive look at word, syntax and punctuation patterns in written user-generated content, researchers Oren Tsur, Dmitry Davidov and Ari Rappoport constructed the Semi-Supervised Algorithm for Sarcasm Identification, which is designed to recognize sarcasm in online sentences and assign each sentence to a sarcastic class (because some people are just a little bit sarcastic).

One idea is that automated sarcasm recognition could help improve review summarization and opinion-mining systems, since sarcasm's subtlety and ambiguity sometimes make it hard even for humans to decide whether a comment is genuine or sarcastic. Identifying cues common to sarcasm in online communication (i.e., excessive capital letters and exclamation marks), the researchers created a complex algorithm in which a small number of sarcastic sentences "teach" the software to recognize sarcasm. They say the software precisely identifies sarcastic sentences 77 percent of the time.

Tsur, Davidov and Rappoport identified three factors that motivated reviewers to bust out the sarcasm: popularity - the more popular a product is, the more sarcastic comments it draws; simplicity - the simpler a product is, the more sarcastic comments it gets if it fails to fill its single function (i.e., noise-blocking/-canceling earphones that fail to block the noise); and price - the more a product costs, the more likely it is to attract sarcasm.

According to the study, the three most sarcastically-reviewed items on Amazon are Shure and Sony noise-canceling earphones, Dan Brown's *The Da Vinci Code* and Amazon's own Kindle e-reader. Studies of user preferences also suggest some consumers find sarcastic reviews biased and less helpful.

Compulsively connected? Millennials can't not social network

When consumers find something they put before sex, sleep and relieving themselves in the morning, a full-fledged obsession can't be far behind. But unlike drinking, drugs and gambling, this addiction du jour is seemingly innocuous: checking in with their social networks. According to a study from Sunnyvale, Calif., electronics information company Retrevo Gadgetology, social networking has made junkies of Millennials, many of whom appear to be obsessed with staying connected to their Facebook and Twitter circles throughout the day and even the night. Fifty-six percent of social media users need to check Facebook at least once a day, and a further 12 percent show a compulsion to check in every couple of hours.

When asked if they check their Facebook or Twitter pages before going to bed, respondents were nearly split on the opposite ends of the spectrum, with 48 percent saying they check before bed, during the night or as soon as they wake up and 52 percent saying they never do this. After going to bed, respondents under age 25 were significantly more likely than their older counterparts to say that they check/update Facebook or Twitter any time they wake up (19 percent vs. 11 percent), sometimes (27 percent vs. 20 percent) or as soon as they wake up in the morning (32 percent vs. 21 percent).

Among social media users, it appears almost half are so involved with Facebook and Twitter that they check in the first thing in the morning, with 16 percent of social media users saying this is how they get their morning "news." iPhone owners stand out in this study as more involved with social media; they use Facebook and Twitter more often and in more places.

Social media has been so integrated into daily life that many users don't view electronic messages as a nuisance or interruption. When asked how they felt about being interrupted at various times and occasions, over 40 percent of respondents said they didn't mind being interrupted for a message, 32 percent said a meal was not off-limits, and 7 percent said they'd even check out a message during an "intimate" moment. The percentage of Millennials who tolerate these types of social media-driven interruptions is nearly double that of 25+ respondents in all instances.

San Francisco focus group invites lefties to commiserate, try new products

Left-handers are reputed to be creative, versatile, intelligent and resilient. Do these traits inhabit the left-handed gene, or are they a product of every lefty's daily struggles in a right-handed world? At 15 percent of the population, the left-handers are certainly the outliers in a world engineered by right-handers for right-handers. From right-handed desktops in school to right-handed scissors and can openers, most products leave the lefties in the lurch, forced to adapt to doing their daily tasks "backward."

Oakland, Calif., left-handed products retailer Lefty's San Francisco began conducting focus groups with lefties to glean information on how they can better meet their unmet needs. A group of lefty volunteers of both genders and all ages were invited to Lefty's San Francisco's corporate office to try out and review a range of current and potential products, including pens and notebooks, knives, corkscrews, left-handed cooking tools, left-handed guitars, computer mice and more.

Some findings from the focus group included that adult lefties have had to adapt and have done so successfully. Many lefties believe they no longer have difficulty using right-handed tools. In fact, using left-handed tools often takes a little training for adults. Conversely, kids take to the left-handed products much more readily. Knives are the most complicated left-handed products to review, and the left-handed tomato knife was warmly received.

In an age of ergonomic design, when office chairs have five different adjustments and sports equipment is manufactured in variations fitting every body type, ability level and style of use, products designed for left-handers are becoming more available.

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Cable service satisfaction hangs on a phone call

Making the call to a cable provider's customer service line is perhaps one of the most dreaded troubleshooting methods one could engage in, but a study conducted by researcher Frost & Sullivan on behalf of Englewood, Colo., customer interactions company CSG Systems International Inc., sug-



gests that the well-established stigma of the crappy cable company may be causing consumers to be unfairly harsh - and causing cable companies to try even harder to build good relationships with their customers.

The threshold for poor customer service experiences is low, in many cases prompting a customer to label a cable operator as a poor customer service provider after only one negative experience. Respondents stated that it takes only two occurrences of bad customer service before they become likely to change their opinion of the service provider to one that has poor customer service. Respondents ages 24-29 are more likely to alter their opinion of a service provider with just one occurrence of bad customer service.

The top three bad customer service incidents chosen by respondents were being on hold for an extended period (68 percent); rude/impolite service representatives (66 percent); and being told an issue is resolved when it isn't (63 percent). Regardless of age or gender, a majority of respondents will switch to another service provider when bad customer service occurs more than 50 percent of the time.

Friendly staff consistently ranked highest (77 percent) as a meter of good experience with a service provider, followed by fast, polite and courteous service. More than 10 percent of respondents said they would write about a good customer service interaction on a social media site. This statistic nearly doubled for a bad customer service experience (i.e., a service disruption). Speed of response (37 percent), faster service changes (36 percent) and fast resolution of issues (35 percent) most influence the decision to use online customer care channels. For more information visit www.frost.com.

Americans resistant to scandal; brands stay safe

From Michael Phelps and his bong to Tiger Woods and his harem, it seems each week there is a new celebrity scandal to which the various entertainment magazines, Web sites and television shows devote hours of time. Sometimes, an underlying consequence of these scandals can be the loss of an endorsement deal for the celebrity involved. Does this matter to the average consumer?

According to a study from Rochester, N.Y., research company Harris Interactive, the answer is: not really. But for those who care the most? Look to middle-aged Midwesterners to flee a brand after a bad-press crisis.

Three-quarters of Americans say when a celebrity endorser gets involved in a scandal, it doesn't impact

the way they feel about the brand or brands they endorse. Just over one in five say they feel worse about the endorsed brands, and 5 percent say they feel better about them.

There is an age difference when it comes to attitude toward the endorsed brands after a scandal. Eight in 10 Americans ages 55+, as well as 77 percent of those 35-44, say the scandal has no impact on how they feel about the brand. Those 45-54 are most likely to have a negative feeling, as 28 percent of them say they feel worse about the brand. Those 18-34, however, are most likely to think positively about it as 11 percent say they feel better about an endorsed brand after a celebrity gets involved in a scandal.

There are also some regional differences in attitudes toward brands after a celebrity gets caught doing something wrong. Those in the Midwest are most likely to have a negative attitude. Over one-quarter of Midwesterners say they feel worse about the brand a celebrity endorses compared to 19 percent of those who live in the East. For more information visit www.harrisinteractive.com.

Will media-multitasking and mobility mean unfocused respondents?

Consumers around the world are changing how they seek and share information. A single e-mail account and a desktop computer are no longer enough to satisfy the need to be constantly connected, and the global population is skewing more and more toward media multitasking and on-the-go communication, according to a global research study conducted by Shelton, Conn., research company Survey Sampling International among adults in the U.S., U.K., France, Spain and Japan.

Media multitasking - such as simultaneously searching Web sites, e-mailing and talking to someone - is prevalent in all countries, particularly

continued on p. 72

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names of note

Bernard “Bud” Sherak, former chairman of *Market Facts Inc.*, a Chicago research company, died on May 9, 2010, at age 91.

Vancouver, B.C., research company *Vision Critical* has hired **Sally Campbell** as managing director of the company’s U.K. headquarters in London. It has also hired **Steevan Glover** as senior vice president, sales, and managing director, Europe. Glover will be based in London.

Separately, *Vision Critical* has made two appointments to its Australian and New Zealand operations. **Daniel Alexander-Head** has been named director, engagement strategy, and **Bala Rajan** has joined the company as head of qualitative. Both will be based out of the company’s Australian headquarters in Sydney.



Glover **Cunningham**

Bellomy Research Inc., Winston-Salem, N.C., has hired **Joe Cunningham** as vice president, social research group.

New York researcher *The Nielsen Company* has promoted **Amanda Wisniewski** to commercial director of its New Zealand online division and Ivan Fuyala to vice president, global client services, portals. The company has also appointed **Nick Whitehead** as account director, New Zealand, and **Andrew Bradford** as vice president, client consulting, media, in Nielsen’s European online division.

Bruce Friend has been appointed president of Los Angeles research company *Ipsos OTX MediaCT*.

Blueocean Market Intelligence, a Phoenix research company, has hired **Yumna Jawad** and **Kirsten Markson** as account manager.

Chicago research company *Synovate* has appointed **Ben Llewellyn** as acting managing director of *Synovate* in Malaysia. Separately, *Synovate* has hired **Milagros Freitas** as country manager of *Synovate* in Peru.



Llewellyn **Freitas**

Stockholm, Sweden, research company *Cint* has named **Arjen van Duijvenbode** managing director of its Netherlands branch. Additionally, *Cint* has promoted **Stephen Hughes** to managing director, U.K.

Synovate Healthcare, a Hamburg, Germany, research company, has hired **Alexander Edte** as senior research manager, custom health care. Edte will be based in Munich. The company has also promoted **Manfred Eberlein** to *Synovate Healthcare* leader, western Europe.



Edte **Eberlein**

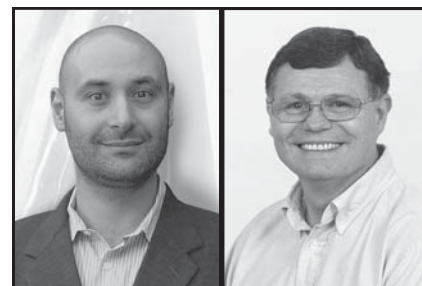
Joelle Schwartz has been promoted to vice president, manager and senior consultant, decision sciences, of Cincinnati research company *Burke, Inc.*

Interviewing Service of America, a Van Nuys, Calif., research company, has hired **Mike Foust** as vice president, account services. Foust will be based in southern California.

Basil Bennett has been hired as CEO of Waltham, Mass., research company *Invoke Solutions*.

J.D. Power and Associates, a Westlake Village, Calif., research company, has named **Richard Millard** senior director, health care.

Steven Sobolevsky has been appointed CTO of Encino, Calif., research company *uSamp*.



Sobolevsky **Friedrich**

MarketVision Research, Cincinnati, has appointed **Bill Friedrich** as vice president.

Boston research company *Chadwick Martin Bailey* has hired **Kathy Ofsthun** and **Susan Lilly** as senior project manager, retail and financial services.

Red Bank, N.J., research firm *KL Communications* has named **John Huntsman** director of operations. Separately, **Lisa Fuchs** will assume the role of online qualitative research specialist.

Gongos Research, Auburn Hills, Mich., has added **Alfred Ishak** as project director and **Marisa Paruch** as senior project coordinator to its financial and diversified team.

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product and service update

QualBoard receives threefold update

20|20 Research Inc., Nashville, Tenn., has expanded its QualBoard platform with QuickView, a technology designed to allow researchers to view, respond to and manage all online bulletin board participant posts from one screen. QuickView is a free upgrade for all QualBoard users and is automatically included in the platform going forward.

The company has further enhanced its QualBoard 3.0 platform with Forever Files and Easy Admin. Forever Files aims to allow clients to access archived project files and transcripts virtually forever. With this system, archived files are deleted from the QualBoard server only when a client chooses to delete them. Easy Admin is a tool intended for QualBoard users to set up their own projects and “demo boards” when they want to show QualBoard to their clients. For more information visit www.2020research.com.

Radius releases PriceDeveloper to get at the bottom line

Radius Global Market Research, New York, has released PriceDeveloper, a proprietary tool designed to provide clear pricing strategy recommendations without the need for in-market tests. PriceDeveloper aims to replicate the real-life buying decision by using a choice-based micro-modeling approach.

The process begins with the Radius team working with marketers to determine the true dynamics of the purchase decision. Consumers are then shown competitive offers and asked to select the one they would buy. Using this data, Radius then employs modeling to create marketplace simulations of the buying decisions under alternative pricing scenarios. Using PriceDeveloper, Radius hopes marketers will understand changes in market penetration and share under alternative pricing scenarios; which brands can com-

mand a premium price and which must use price to draw in new customers; see revenue-neutral price points that balance share against price. For more information visit www.radius-global.com.

Revelation goes mobile, expands languages

Revelation, a Portland, Ore., research software company, has released the public beta of Revelation Mobile, its mobile app. The technology is designed to capture and record consumer behavior in real time and allow researchers to tailor mobile studies as extensions of their Revelation projects.

Features of the Revelation Mobile beta version include diary-style activities to track consumer purchases, behavior and consumption; photo uploads for participants to capture their environment; and open- and closed-ended prompts for both barometer-type and probing questions. The beta release was scheduled to end June 30, 2010, and the company anticipates an incubation period before Revelation launches its official release.

Additionally, Revelation has expanded its language capabilities to include Korean, Brazilian Portuguese and Greek. For more information visit www.revelationglobal.com.

Pittsburgh paper offers readers online community and forum

Pittsburgh Post Gazette and Campos Inc., a Pittsburgh research firm, have partnered to offer VOICE of the Region, a Web based opinion panel and online community of southwestern Pennsylvania residents, to the Post Gazette’s readership. This partnership is intended to gauge public opinion on issues and topics of local importance and sharing the results with the public. VOICE of the Region members will be invited to participate in polls, surveys, forums and other activities and offer

their opinions and insights on local, regional and national topics of interest. Their feedback will potentially help influence planning and decision making in the Pittsburgh area. The panel’s membership numbers in the several thousands and was developed by Campos Inc. in conjunction with Pittsburgh technology firm CivicScience. For more information visit www.postgazette.com/vor.

Clarabridge releases version 4.1 of its text mining software

Reston, Va., research software company Clarabridge Inc. has rolled out Clarabridge Enterprise 4.1, the latest version of its text mining software. This version is designed to provide an enhanced framework for understanding customer feedback through sentiment analysis, data visualization and new wizards and tutorials.

Clarabridge 4.1 offers sentiment intensity enhancements, which allow users to weight words based on their own individual preferences; embedded data visualization and reports; added wizards and templates to guide users through setting up a project; enhanced anaphora support to improve resolution of pronouns like “it” for more accurate categorization and sentiment results; and increased online training, including 40+ online tutorial videos on a variety of topics. For more information visit www.clarabridge.com.

New filtering tool to help discern winning and losing concepts

Vancouver, B.C., research company Vision Critical has released IdeaScreenPlus, an online research tool intended to enable clients to filter out bad from good product ideas before developing them further by automating iterative testing and collecting respondent feedback in days. This tool is intended to allow researchers to continually field new

continued on p. 76

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News notes

Marketing Intelligence, a Tucson, Ariz., market research firm, closed its doors for business on May 31, 2010, citing the economic downturn as its reason for shutting down.

The Marketing Research Association (MRA), Glastonbury, Conn., filed official comments on May 21, 2010, objecting to a proposed regulation from the Federal Communications Commission (FCC) which would add restrictions to calls made to cell phones, making it more difficult for researchers to call cell phone users. The MRA's comments addressed a portion of the rule, ostensibly dealing only with telemarketing automated calls known as robocalls, requiring that anyone seeking consent to dial a cell phone with an automatic telephone dialing system adhere to rules to obtain respondent consent to receive research calls - the same process the FCC proposes for telemarketing robocalls. This would require a clear and specific written agreement, signed by the cell phone user, to receive calls from researchers using an autodialer. (See related article on page 16 of this issue.)

GfK Custom Research North America, New York, has been renamed **GfK Roper Public Affairs and Corporate Communications**.

Itracks, a Saskatoon, Saskatchewan, research company, has filed a motion to lift the stay and proceed with litigation in its 2008 patent infringement lawsuit against **Artafact LLC**, a Fremont, Calif., research company. In its complaint, Itracks asserts that Artafact's synchronous and asynchronous online focus group products infringe upon one or

more claims of Itracks' U.S. Patent No. 6,256,663.

Orem, Utah, research company **Western Wats** has announced plans to create 170 new jobs in its Casa Grande, Ariz.; Pittsburg, Kan.; and Brookings, S.D., call centers.

Acquisitions/transactions

Palo Alto, Calif., research software company **Attensity Group** has agreed to acquire Redwood, Calif., research company **Biz360 Inc.** Attensity's platform will absorb Biz360 product portfolio of social media monitoring tools and will be known as Attensity360.

London research company **Datamonitor Group** has acquired research company **Pack-Track**. Following the acquisition, Pack-Track will operate independently under the direction of Andrew Streeter.

The Corporate Executive Board, an Arlington, Va., business information company, has agreed to acquire Minneapolis research company **Iconoculture**. The Corporate Executive Board will incorporate Iconoculture's annual subscription-based advisory products into its research programs.

Hamburg, Germany, research company **Synovate Healthcare** has purchased Netherlands health care consultancy **Firm United Healthcare** (FUH). The FUH team will operate from Synovate Healthcare's Amsterdam office.

GfK Kynetec, a Newbury, U.K., research company, has acquired the non-crop business of London research consultancy **Agricultural Information Services**. AIS will continue to operate in the pesticide market and conduct other market research activities that are non-competitive with GfK Kynetec.

Alliances/strategic partnerships

Nottingham, U.K., research company **Experian** has agreed to divest part of its U.K. database marketing activities to a business venture with **British Sky Broadcasting** (BSkyB), Middlesex, U.K. BSkyB will hold a majority stake in the new company. The company will operate under a new brand name, not yet announced.

Cint, a Stockholm, Sweden, research company, has entered into a strategic alliance with Chennai, India, research agency **krea**, in which krea will adopt the Cint Panel Exchange to service Indian clients.

TiVo, Alviso, Calif., and Naperville, Ill., research company **Millward Brown** have partnered to combine the consumer segmentation information from Millward Brown with passively-observed TV viewing information collected by TiVo. Millward Brown will offer its clients the ability to ask proprietary sets of questions to 35,000 TiVo subscribers who have expressly agreed to participate in TiVo's Power||Watch ratings service viewing panel.

Kinesis Survey Technologies LLC, an Austin, Texas, research company, has partnered with **CMS Research**, Toledo, Ohio. CMS Research's interactive voice response platform will be offered as an alternative response mechanism for Kinesis Survey mobile survey participants.

Dayton, Ohio, intelligence company **Teradata Corporation** has partnered with Reston, Va., research company **Clarabridge** to address airline passenger issues. The partnership will examine the

continued on p. 78

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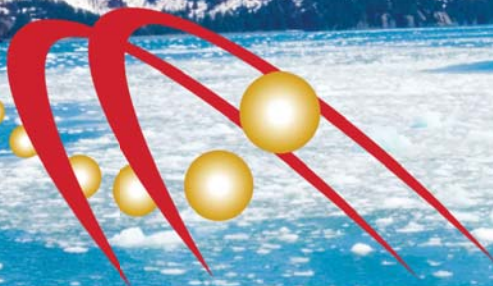
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Calling cell phones - the FCC makes a bad regulation worse

As the need to include cell phone users in telephone research samples continues to grow, so have the challenges involved in reaching them. The latest comes from the Federal Communications Commission (FCC), which early this year announced it would be harmonizing its regulations for telemarketing “robocalls” with those of the Federal Trade Commission (FTC).

Existing FCC rules¹ prohibit the use of an “automatic telephone dialing system” to contact “any telephone number assigned to a paging service, cellular telephone service, specialized mobile radio service, or other radio common carrier service, or any service for which the called party is charged for the call” without “express

prior consent” on the part of the party being called.

The new FCC rule proposes that “prior express written consent” must be obtained from the recipient of the call. That agreement must:

- include a “clear and conspicuous disclosure that the purpose of the agreement is to authorize the delivery of calls to the recipient using an automatic telephone dialing system” and that the “agreement be executed” without any requirement that the recipient purchase “any good or service”;
- evidence “the willingness of the recipient of the call to receive calls using an automatic telephone dialing system”; and

Editor’s note: Howard Fienberg is director of government affairs for the Marketing Research Association. He can be reached at howard.fienberg@mra-net.org. To view this article online, enter article ID 20100701 at quirks.com/articles.

- include “the telephone number to which such calls may be placed in addition to the recipient’s signature.”

Will hurt research

As the Marketing Research Association explained to the FCC in comments filed on May 21, researchers need to be able to include cell phone users in their studies in order to have viable coverage in their samples. The FCC’s proposal will hurt research, research users and the public.

Decreased response rates. The new rule will decrease response rates since it entails burden on respondents. Further, many respondents suffer apprehension at the prospect of signing a consent form which they may or may not fully understand.

Increased cost of research.

snapshot

The MRA’s Howard Fienberg details why a new proposed FCC rule intended to spare cell phone users from autodialers will hurt research, research users and the public.

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Researchers seeking to include cell phone users in their study samples already estimate that it costs two to four times as much as an ordinary study. The new rule will increase that cost exponentially.

Increased time required to complete studies. In situations where timely data is as critical as accurate data, information will not be readily deliverable to companies, government agencies and other entities that need to make swift decisions. Time-sensitive studies, like most political and public opinion polling, would be imperiled.

Privacy and data security threat of added recordkeeping and data retention. The FCC admitted that the proposed consent requirement “may entail additional recordkeeping requirements.” Given that the standard in research is to keep identifiable records only as long as necessary for the completion of a study, the proposed rule will place serious new recordkeeping burdens upon the profession and increase risks to information security and confidentiality.

No demonstration of harm. The FCC didn’t demonstrate any harm from the existing consent standard that would demand raising the bar. While the FCC claims the proposed rule enhances the agency’s efforts to protect “both consumers and industry from erroneous claims that consent was or was not given,” MRA is unaware of any cases of a cell phone user contesting the express prior consent for a bona fide survey and opinion research call to their cell phone. This is distinctly different from

continuing consumer complaints of commercial or political robocalls.

Decreased representativeness of survey and opinion research. Almost 40 percent of American households can only be reached on their cell phones.² Without following arduous (in many cases impossible) procedures to obtain consent, such numbers must be separately identified, sampled and then dialed manually. It is unlikely that these populations would wish to be disenfranchised from research studies (which serve as an ombudsman for the American public).

Harder to reach the prepaid cell phone market. Cell phone numbers assigned to prepaid plans change subscribership frequently, making it more challenging to reach such users in a timely fashion. CTIA-The Wireless Association estimates that one in five Americans with a cell phone had a prepaid plan at the end of 2009, compared with 15 percent in 2007.³ CTIA also claims that some markets have up to 30 percent of subscribers in prepaid plans.

Government agency study requirements. Many federal government agencies, seeking to avoid coverage bias, require the inclusion of cell phone-only and cell phone-mostly households in the research studies they conduct or commission. The FCC would thus balloon the cost and time required to conduct federal research studies.

Research is not the focus of the rule or the law. The most important reason the FCC should not impose the proposed rule on the research profession is that

research calls are not the intended focus of the rule or the Telephone Consumer Protection Act (TCPA). The FCC speaks almost exclusively of sales and telemarketing calls throughout the proposed rule, neglecting to mention or even consider the negative impact of the rules changes on non-commercial calls. The legislative history of the TCPA demonstrates the same focus. Given that this change is buried in a rule focused on telemarketing and robocalls, it is unlikely that the FCC gave consideration to the negative impact the change would have on non-commercial calls.

Clarion call

The FCC’s proposed rule should serve as a clarion call to the research profession to demand a change in the TCPA – not a tightening of consent standards but the full exclusion of bona fide survey and opinion research calls from the restrictions on autodialer calls to cell phones. As the lobbyist for the research profession in the U.S., I’m working to secure that exclusion and need your help to make it happen. Will you answer the call? | Q

References

¹ 47 CFR 64.1200

² Blumberg S.J., Luke J.V. “Wireless substitution: Early release of estimates from the National Health Interview Survey, July-December 2009.” National Center for Health Statistics. May 2010. Available online: www.cdc.gov/nchs/data/nhis/earlyrelease/wireless201005.htm

³ Niraj Sheth and Roger Cheng. “As Growth Slows, Phone Rivals Start Dialing Prepaid Services.” *Wall Street Journal*. May 14, 2010. Page B1.

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The Fine Art of Marketing Research



The pros and cons of survey routers in online research

Survey routers in online research work like routers in telephone units. A router in a telephone unit directs a potentially willing respondent to an available interviewer who then administers an interview. In the online research world, the router directs a willing respondent to an available open survey.

Using a router in an online survey enhances both efficiency and the respondent experience. The chance of the respondent's willingness to participate being met with a screen-out or a "Quota full" message is greatly reduced. The negative impact that rejection has on a panelist when he or she is ready to do an inter-

view cannot be overestimated. Respondents resent giving their time and effort only to end up screening out of surveys. Screen-outs are, in many panelists' eyes, the No. 1 cause of dissatisfaction with the survey-taking process.

While using a router can decrease the incidence of screen-outs, it can also inject bias. Since respondents usually only can complete one interview, they are being systematically excluded from all other interviews for which they could qualify. Systematic exclusion is a bias.

At the 2010 CASRO panel conference in February, Olivier de Gaudemar and Scott Porter of OTX illustrated the bias engen-

Editor's note: Pete Cape is global knowledge director in the London office of Survey Sampling International. He can be reached at pete_cape@surveysampling.com. To view this article online, enter article ID 20100702 at quirks.com/articles.

dered by routers through use of Venn diagrams. De Gaudemar and Porter cited two studies: one looking for people who watch music videos and the other looking for people who watch TV online. Naturally, there are some people who do both (Figure 1).

The impact of the bias on one survey or another will depend on the router design. A purely random router will assign people who do both roughly equally between the two surveys, as shown in Figure 2.

A priority router will assign people who do both to one survey in preference over another (Figure 3).

Note that the size of the overlap will impact the bias as will the relative sizes of the two

snapshot

Survey Sampling's research-on-research found that while routers bring bias to online research, that bias does not affect the outcome of the research. Further, the use of routers may improve respondents' survey-taking experience.



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Figure 1

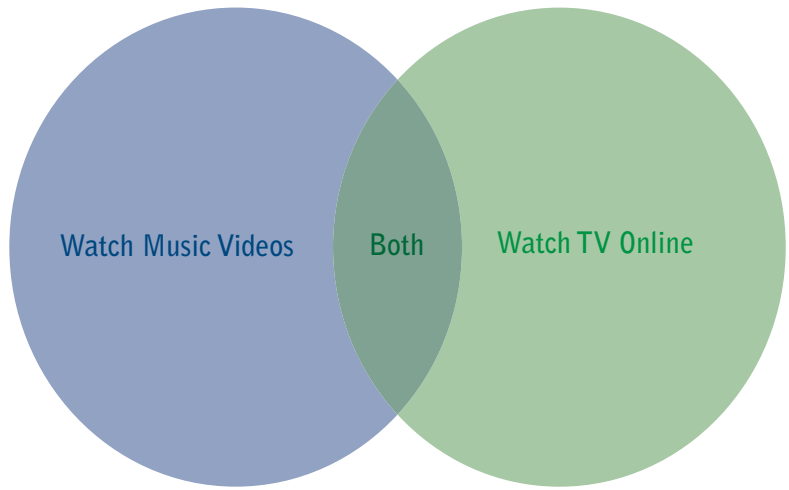


Figure 2

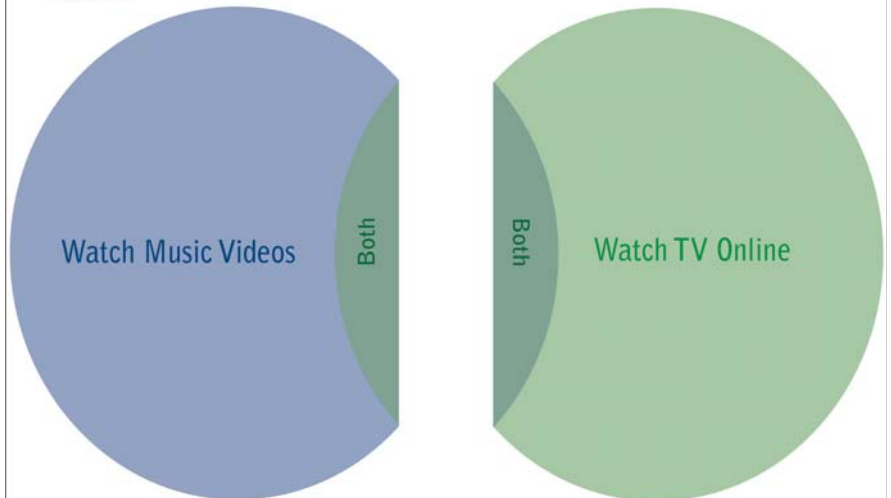


Figure 3

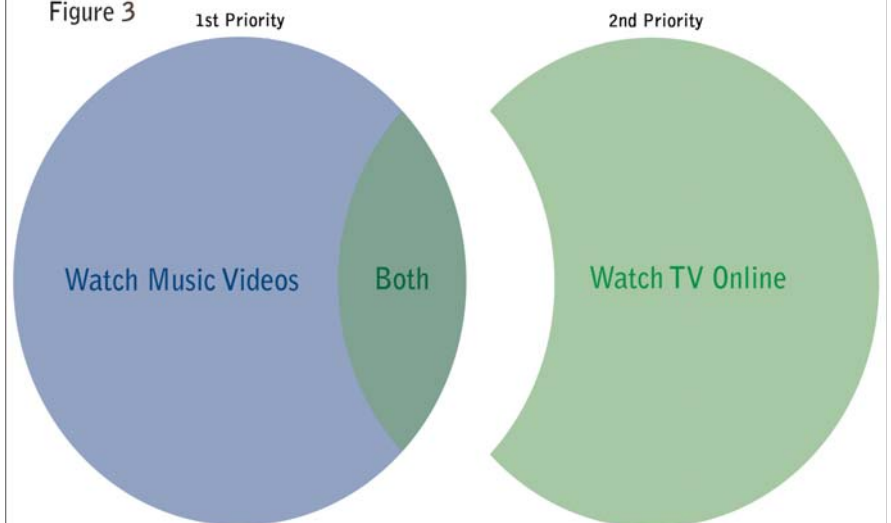
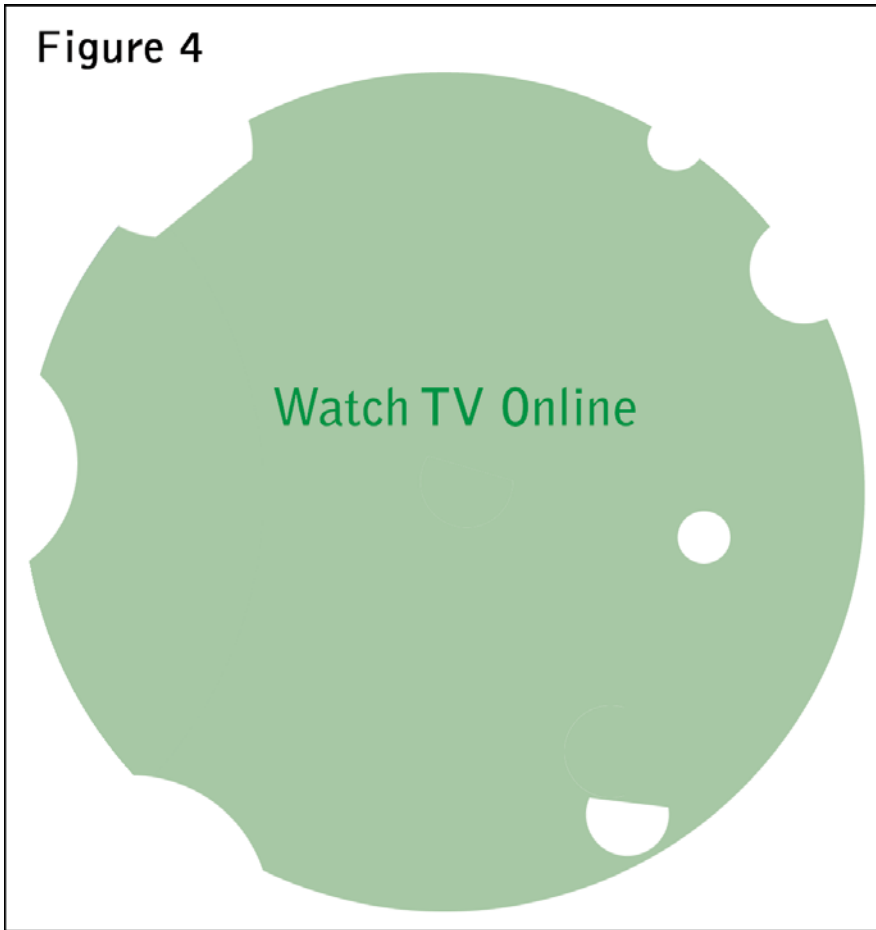


Figure 4



projects. More typically there will be multiple projects of varying sizes running at different times with varying degrees of overlap. Changes to priority order and any random elements within the router design make it unlikely that the sample will have a nice crescent shape as in the two-survey scenario. A sample suffering bias may actually look more like the one shown in Figure 4.

Small nibbles and holes appear in the sample where particular types of people have been selected for other surveys when they could have qualified for the “watch TV online” study.

Researchers have always stressed the need to minimize the risk arising from systematic errors (i.e., bias). Reducing or eliminating the risk was important when bias could not be measured. In the example here, the size of the bias can be measured since the size of “both” is known at the top level of the router. It can be corrected for through weighting, assuming a

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Rick likes the personal approach he gets from being part of his online community.

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

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Anna uses surveys to express herself.

Dr. Doe doesn't mind taking surveys, but he can be hard to contact.

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priority system hasn't been utilized that has resulted in a situation where, for example, there are no "both" people in the "watch TV online" survey to weight.

Must be different

A secondary consideration must be whether it matters. Two elements will come into play. Firstly the size of any hole or nibble needs to be considered. If, for example, only 5 percent of the potential sample is missing from the actual sample, is it possible for the missing 5 percent to affect materially the outcome of the survey? For the bias to have an effect on the outcome of the survey, the hole must be big and the people missing must be different from those who are present. Technically speaking, the bias must be correlated strongly with the subject matter of the questionnaire. Imagine a survey subject where men and women thought alike on each and every question. At this point it would not matter if the entire sample was made up of women, because the survey results would be exactly the same.

This may strike some researchers, used to balancing samples on gender as a matter of course, as somewhat odd. Think instead about some variable we do not balance on as a matter of course, say left- or right-handedness. If left- or right-handedness does not affect the answers to the survey then there is no need to ensure a "correct" balance and no need to be concerned if there are no left-handed people in the survey. In these two examples gender and handedness are equally of no consequence to the project. Researchers may feel some discomfort at the thought of the bias in the case of gender but probably less so in the case of handedness. This is a result of what they are accustomed to rather than because it matters.

A simulation

The effect (or lack of effect) of bias can be demonstrated through a simulation. In each of the accompanying tables, we adjust the number

Big hole, big difference in opinion

	Unweighted				Weighted				Significant? 95% 1-tailed test
	Total		Non-Type A	Type A	Total		Non-Type A	Type A	
Base	1,000	%	975	25	1,000	%	900	100	Yes
Q1 = Yes	512	51%	50%	99%	549	55%	50%	99%	
Q1 = No	488	49%	50%	1%	451	45%	50%	1%	

Medium hole, big difference in opinion

	Unweighted				Weighted				Significant? 95% 1-tailed test
	Total		Non-Type A	Type A	Total		Non-Type A	Type A	
Base	1,000	%	950	50	1,000	%	900	100	No
Q1 = Yes	525	52%	50%	99%	549	55%	50%	99%	
Q1 = No	476	48%	50%	1%	451	45%	50%	1%	

Small hole, big difference in opinion

	Unweighted				Weighted				Significant? 95% 1-tailed test
	Total		Non-Type A	Type A	Total		Non-Type A	Type A	
Base	1,000	%	925	75	1,000	%	900	100	No
Q1 = Yes	537	54%	50%	99%	549	55%	50%	99%	
Q1 = No	463	46%	50%	1%	451	45%	50%	1%	

of Type A people in the sample. Type A people are the hole in the sample. We also adjust the extent to which they differ in their views from everyone else. In all cases, the natural proportion of Type A people in the population is 10 percent. We are weighting to, in effect, this natural proportion. We have fixed the opinion of non-Type A people as 50:50 on the question at hand to keep the number of dimensions under some control.

In only one case in our simulation does the correction for the hole make a statistically significant difference to survey results. Even then, the results change from 51 percent to 55 percent. Few researchers would generally make much of a difference of that magnitude.

To have made a significant difference, the missing respondents would have had to be a large proportion (7.5 percent) and radically different in their views on the subject.

This simulation is for a two-project scenario since this is easiest to comprehend. The two-project scenario is, in fact, the scenario with the greatest potential for bias. Every time a new project is added to the mix, and assuming some random element in the assignment process, the effects are diluted.

Not discernable

Survey Sampling International (SSI) tested 39 projects concurrently, all of which had run in the past, and examined data distributions not for the bias itself but for the effect of the bias on the data. In the majority of instances (27) data differences were not discernable. Of the 12 remaining projects, either a logical reason for the change was found or we were able to demonstrate that it was not bias arising from survey allocation that was responsible for the data difference.

This last point is interesting. Because the router operator should be aware of all the surveys any

	Telephone	Online Direct Invite	Online - Router
Non-response bias	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Self-selection bias	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Non-coverage bias	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Social desirability bias	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acquiescence bias	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-completion bias	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Big hole, medium difference in opinion

	Unweighted				Weighted				Significant? 95% 1-tailed test
	Total		Non-Type A	Type A	Total		Non-Type A	Type A	
Base	1,000	%	975	25	1,000	%	900	100	No
Q1 = Yes	506	51%	50%	75%	525	53%	50%	75%	
Q1 = No	494	49%	50%	25%	475	48%	50%	25%	

Medium hole, medium difference in opinion

	Unweighted				Weighted				Significant? 95% 1-tailed test
	Total		Non-Type A	Type A	Total		Non-Type A	Type A	
Base	1,000	%	950	50	1,000	%	900	100	No
Q1 = Yes	513	51%	50%	75%	525	53%	50%	75%	
Q1 = No	488	49%	50%	25%	475	48%	50%	25%	

Small hole, medium difference in opinion

	Unweighted				Weighted				Significant? 95% 1-tailed test
	Total		Non-Type A	Type A	Total		Non-Type A	Type A	
Base	1,000	%	925	75	1,000	%	900	100	no
Q1 = Yes	519	52%	50%	75%	525	53%	50%	75%	
Q1 = No	481	48%	50%	25%	475	48%	50%	25%	

one respondent could have taken, as well as which one actually was taken, they know how the sample ought to be distributed across all the screening questions. This gives the opportunity to weight the data set to this distribution to see how the data might be affected.

This is not the case when the precise same bias arises from panel management practices. Panel owners often know a great deal about their panelists and do not want to overburden them with invitations. Assume a sample of BMW owners is drawn from the panel to take part in a survey. At this point they are not available to take part in any other survey. All the other surveys that the panel company is running will be biased through the systematic exclusion of BMW drivers. Precisely the same bias occurs in the router. This will not be transparent to the client nor is it likely that the client's survey will ask about automobile ownership. No correction can be made to the bias.

Without panel management rules, the bias occurs when the panelist selects which of his or her many e-mail invitations to answer. Again there may be some systematic, rather than random, selection procedure going on

regarding the incentive, survey topic or interview length, for example. The point is that it is both possible and unknown.

The comparison chart summa-

rizes many of the biases inherent across methodologies.

No evidence

It is incontrovertible that routers bring bias to online research. As can be seen in the comparison chart, however, bias is inherent in telephone surveys, in online surveys with direct invites and in online surveys using a router. The real consideration is whether the bias introduced by a router in online research is worse than the bias introduced using a direct invite and if the bias materially affects the survey outcome. SSI's research suggests that a router does not make the current situation worse. There is no evidence that the bias materially affects the outcome of the survey. Furthermore, using a router in online surveys actually improves the respondent experience. And in today's online environment of increased competition for people's time and attention, this may be the most important consideration of all. | Q

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Stable earnings, wandering eye?

A report on the 2010 *Quirk's* salary survey of client-side researchers

Last year, we fielded our client-side researcher compensation survey in June, during the darkest days of the recession, and researchers were notably sanguine about their salary and bonus numbers, with most predicting that their overall income would stay the same or increase slightly.

Based on the results from this year's survey, what initially smacked of whistling past the graveyard now seems prescient, as 31 percent of this year's group said their 2010 salary stayed the same, 23 percent cited an increase of between 1 and 2 percent, and 25 percent netted an increase in the range of 3 to 4 percent.

On the bonus front, about half (47 percent) said their 2009 bonus stayed the same as 2008, with a combined 32 percent reporting bonus increases from 1 percent to over 10 percent.

Our 24-question survey was conducted online in April among *Quirk's* subscribers at client-side organizations. We received 883 usable completed surveys and achieved an interval of 3.2 at the 95 percent confidence level. (Not all respondents answered all questions.)

Respondents came from a range of industries, with health care/pharmaceuticals; insurance; banking/financial; media/publishing/information; consumer goods; manufacturing; advertising/PR and retail serving as the best-represented sectors.

The most-cited job titles/roles included market research manager (258), market research director/senior director (174), senior research analyst (87), research analyst (74), senior vice president or vice president (46) and customer insights manager (35).

Editor's note: To view this article online, enter article ID 20100703 at quirks.com/articles.

snapshot

Against the backdrop of continuing economic woes, year two of our annual salary survey of client-side researchers found relatively stable base salary and bonus figures. While most plan to stay where they are, a solid segment says they will seek better opportunities once the economy improves.

Working more hours

Anecdotally, the general sense during the economic slowdown has been that workers across all industries are putting in longer hours as companies try to wring every ounce of productivity out of their current staffs. Here in the research realm, 37 percent of the respondents said they are working more hours and 57 percent reported working about the same number of hours.

In spite of the increased workload for some, our respondents reported admirable levels of job satisfaction, with 35 percent claiming to be satisfied and 18 percent saying they were very satisfied (Figure 1). Twenty percent reported some level of dissatisfaction.

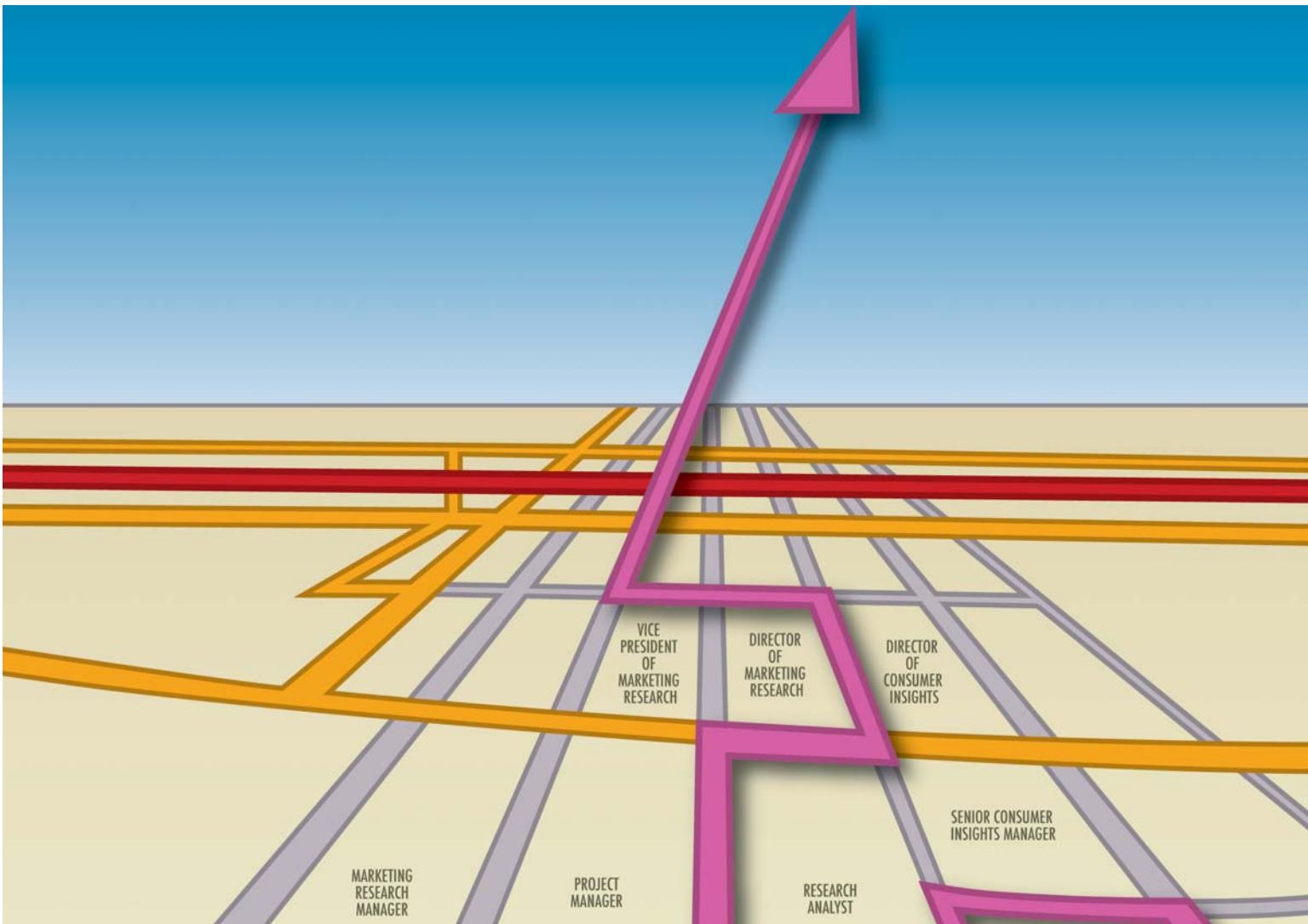
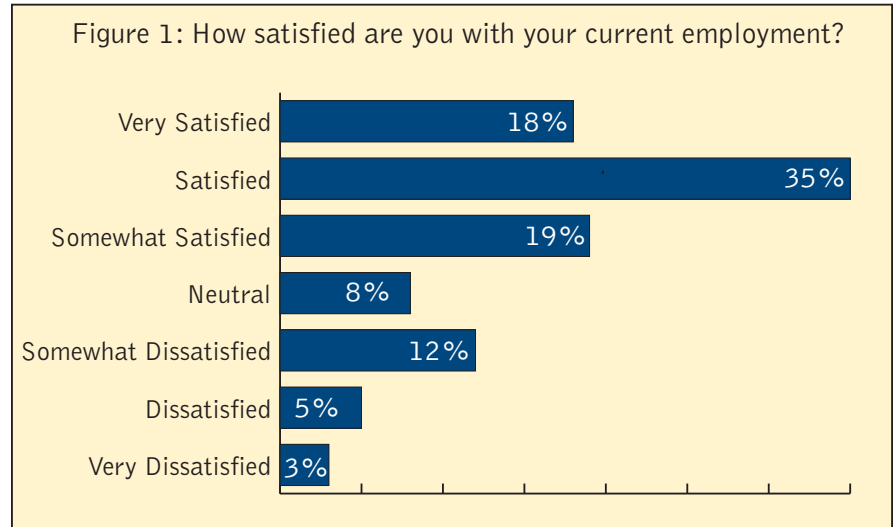
Perhaps because of that general feeling of satisfaction, most are planning to stay at their current jobs and not seek employment elsewhere once the economy improves. While 19 percent were undecided if they

would look elsewhere for a job, 17 percent were very unlikely, 16 percent were unlikely and 11 percent were somewhat unlikely to do so. Still, a combined 37 percent gave responses indicating that they were somewhat (18 percent), likely (9 per-

cent) or very likely (10 percent) to seek out greener pastures.

Focus on research

While their employers may be working them longer, at least the researchers are still able to focus on research. This



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Total 2010 Compensation, By Job Title

Job Title	Response %	Base	Bonus	Total
Owner/President/CEO	2%	\$119,818	\$4,545	\$124,364
Sr. Vice President or Vice President	5%	\$152,841	\$27,341	\$180,182
Market Research Dir. / Senior Dir.	20%	\$127,229	\$20,187	\$147,416
Market Research Manager	30%	\$92,612	\$9,144	\$101,756
Account Executive / Manager	< 1%	\$69,000	\$4,500	\$73,500
Customer Insights Manager	4%	\$93,621	\$7,621	\$101,241
Director of Marketing	2%	\$108,611	\$6,889	\$115,500
Marketing Manager	2%	\$68,890	\$7,850	\$76,740
Brand Manager or Product Manager	1%	\$85,286	\$3,857	\$89,143
Communications Director / Manager	1%	\$85,400	\$3,800	\$89,200
Project Manager	3%	\$76,520	\$11,440	\$87,960
Business Development	< 1%	\$99,667	\$16,000	\$115,667
Senior Research Analyst	10%	\$77,916	\$5,133	\$83,048
Research Analyst	9%	\$54,923	\$3,631	\$58,554
Business / Market Analyst	2%	\$64,067	\$2,200	\$66,267
Statistician	< 1%	\$65,750	\$3,750	\$69,500
Research Assistant	1%	\$42,000	\$667	\$42,667
Sales / Account Representative	< 1%	\$67,500	\$38,333	\$105,833
Administrator / Coordinator	1%	\$47,143	\$1,429	\$48,571
Consultant	2%	\$87,231	\$7,885	\$95,115
Other	3%	\$92,800	\$17,500	\$110,300

Total 2010 Compensation, By Experience

Years of Experience in M.R.	Base	Bonus	Total
< 1 year	\$62,684	\$8,450	\$71,134
1 - 2	\$60,028	\$6,528	\$66,556
3 - 5	\$66,585	\$6,777	\$73,362
6 - 10	\$87,805	\$8,462	\$96,266
11 - 15	\$101,563	\$12,029	\$113,592
16 - 25	\$115,364	\$14,412	\$129,775
>25	\$122,785	\$16,753	\$139,538

Total 2010 Compensation, By Gender

Gender	Base	Bonus	Total
Male	\$104,897	\$13,778	\$118,675
Female	\$90,227	\$9,452	\$99,679

Total 2010 Compensation, By Degree Achieved

Highest Degree Achieved	Base	Bonus	Total
High-school graduate	\$84,737	\$5,895	\$90,632
College graduate	\$85,986	\$8,891	\$94,877
Masters program graduate	\$102,337	\$12,866	\$115,203
Ph.D. graduate	\$108,926	\$13,185	\$122,111

year's figures for percentage of work time spent on research were nearly identical to 2009's. Forty-two percent reported spending 75 percent or more of their time conducting, coordinating and analyzing research (43 percent answered thusly in 2009); 22 percent claimed

51-75 percent of their time is spent on MR (2009: 21 percent); and 14 percent reported 26 to 50 percent of their time is used that way, the same as in 2009.

Also similar to 2009 were the number of full-time equivalent marketing research employees at a respondent's

Total 2010 Compensation, By Region

Region	Base	Bonus	Total
North East (CT, MA, ME, NH, RI, VT)	\$118,000	\$17,232	\$135,232
Mid Atlantic (NJ, NY, PA)	\$112,586	\$17,845	\$130,431
East North Central (IL, IN, MI, OH, WI)	\$89,872	\$9,513	\$99,385
West North Central (IA, KS, MN, MO, NE, ND, SD)	\$87,986	\$10,472	\$98,458
South Atlantic (DE, FL, GA, MD, NC, SC, VA, WV)	\$94,500	\$8,931	\$103,431
East South Central (AL, KY, MS, TN)	\$84,250	\$9,063	\$93,313
West South Central (AR, LA, OK, TX)	\$85,238	\$8,262	\$93,500
Mountain (AZ, CO, ID, MT, NM, NV, UT, WY)	\$74,529	\$4,382	\$78,912
Pacific Coast (AK, CA, HI, OR, WA)	\$106,140	\$11,890	\$118,030
Canada	\$79,643	\$5,214	\$84,857
Mexico/Central and South America	\$108,500	\$19,000	\$127,500
Europe	\$100,357	\$10,643	\$111,000
Asia	\$51,480	\$9,800	\$61,280
Middle East*	\$48,500	\$3,000	\$51,500
Africa*	\$12,000	\$2,000	\$14,000
Australia/New Zealand*	\$90,000	\$2,500	\$92,500

* Fewer than 10 responses were received from these regions

organization. One- and two-person research departments were cited by 29 percent of respondents, with 22 percent saying they have three to five researchers and 12 percent a six- to 10-person internal research function. Nineteen percent of respondents said their department was 25 people or larger.

It's a good bet those staffs will stay the same size, according to our findings. Just over a third (33 percent) of these *Quirk's* readers said it was very unlikely that their company would hire additional research employees in 2010. While a further 17 percent said it was unlikely, 12 percent said it was somewhat likely, 9 percent said it was likely and another 12 percent said it was very likely that the MR staff would increase.

In another echo of last year's findings, our readers on the client side are a veteran bunch, with 23 percent claiming 16 to 25 years of experience in MR, 22 percent with 11 to 15 years and 21 percent with six to 10 years in the research trenches (Figure 2).

In terms of continuing their professional development, most (79 percent) said they do not hold a professional or

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Total 2010 Compensation, By Annual Revenue			
Annual Revenue/Sales	Base	Bonus	Total
< \$1Million U.S. dollars	\$73,773	\$3,455	\$77,227
\$1M - \$3M	\$91,154	\$8,885	\$100,038
\$3M - \$6M	\$69,400	\$1,600	\$71,000
\$6M - \$10M	\$75,333	\$3,667	\$79,000
\$10M - \$50M	\$80,785	\$8,561	\$89,345
\$50M - \$100M	\$80,477	\$6,568	\$87,045
\$100M - \$300M	\$86,507	\$8,164	\$94,671
\$300M - \$500M	\$85,920	\$5,275	\$91,195
\$500M - \$1 Billion	\$96,655	\$10,679	\$107,333
>\$1 Billion U.S. dollars	\$107,982	\$15,332	\$123,313

industry certification related to marketing research, such as those offered by Burke, RIVA, the Marketing Research Association's Professional Researcher Certification or the Marketing Research Institute International's Principles of Marketing Research program.

A richer view

New this year were two open-ended questions (What do you like most/least about working in marketing research?), aimed at getting a richer view of researchers' current feelings about their day-to-day work. (The accompanying sidebar has more highlights.)

First, some sample replies to the "like most" question:

"I enjoy solving problems, finding answers, and showing my employer new ways to succeed."

"Being 'the voice' of the consumer."

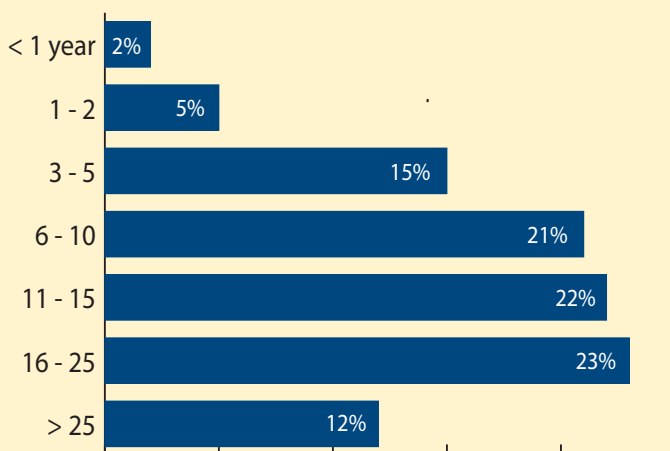
"The process itself - writing surveys, designing studies, trying to find the answers."

"Solving puzzles and telling stories."

And, from the "like least" responses:

"Non-researchers convinced they can do my job better than I can."

Figure 2: How many years of experience do you have in marketing research?



"What do you like least about working in marketing research?"

Move over, Mr. Dangerfield

"The aspect of being a 'water carrier'... assisting the decision makers but rarely getting to be a decision maker."

*"That with products like Survey Monkey, everyone thinks they can field a *good* survey which will yield insights. Having amateurs and inexperienced people crafting surveys does the industry an injustice, as survey-takers are further inundated, increasing having poor survey experiences, and bad data are then used by management to make ill-informed decisions. There is a science and an art to questionnaire design, and not everyone can do it, despite what they may think."*

Co-workers/internal clients who just don't get it

"Senior management say that voice of consumers is important for decision-making, but in reality, they don't really look into this. The decisions seem to be made based on their own beliefs."

"How misunderstood our field is and how often we are expected to provide information to 'prove' something rather than provide 'objective' information."

Pet peeves, anyone?

"Watching a manager cherry-pick research results."

"The amount of time and repetition it takes for an insight to be absorbed and acted on by the rest of the marketing team."

"Lack of institutional learning from previous MR projects."

Take this job and...

"Stupid clients."

"Paperwork, paperwork, paperwork and, oh yeah, paperwork."

"My boss."

"The monotony."

"The group of people I work with! ;-)"

"Corporate America, which has become a total zoo."

Overworked, underpaid?

"Impossible deadlines, impossible expectations and having folks who think that our job is just to carry out what they think is research. We're not here just to recruit or make a report; we're here to add value."

"The chaos!!!"

"The pay."

"Resources, resources, resources. I am a one-man show managing between 25-30 research projects at any given time."

Blame the researcher!

"I don't like the fact that numbers and statistics can be misused and misinterpreted for political gain. I don't like the fact that quantitatively measuring the wrong thing is often preferred over intuitively assessing the right thing. I don't like it when my clients use research to cover their ass as opposed to take a calculated risk. And I don't like it when clients feel that the person who understands the data is therefore somehow qualified to drive creative solutions based on those data. No, just because 60 percent of an audience has children it does

not mean you need to put a cute little kid in the ad."

"It is tough to not have all the answers; it is tough when management wants to kill the messenger."

Problems with the process of research

"Having to work with an existing marketing and research plan that was poorly written and conducted but has the confidence of my client."

"That no one wants to change their behavior based on what they learn."

"People expect that my reports will wow them. Well, if the data is boring or expected then there's not much more I can do."

"The administrative processes such as work orders, master vendor agreements, purchase orders, etc."

"Sitting in dark rooms and not having ownership of the outcome."

"Stats haha."

Total 2010 Compensation, By Industry


Industry	Base	Bonus	Total
Advertising/Public Relations	\$89,863	\$5,922	\$95,784
Agriculture	\$83,167	\$6,667	\$89,833
Automotive	\$121,800	\$4,300	\$126,100
Banking/Financial	\$93,706	\$12,000	\$105,706
Building Materials/Products	\$100,250	\$9,000	\$109,250
Computer Hardware/Software	\$93,769	\$7,308	\$101,077
Construction/Housing	\$89,000	\$5,800	\$94,800
Consulting	\$123,727	\$8,636	\$132,364
Consumer Goods	\$114,517	\$19,466	\$133,983
Education	\$81,211	\$5,789	\$87,000
Entertainment	\$112,357	\$10,143	\$122,500
Food/Beverage	\$106,037	\$20,481	\$126,519
Government	\$87,000	\$583	\$87,583
Health Care/Pharmaceuticals	\$105,061	\$16,571	\$121,633
Hospitality (hotels, restaurants, etc.)	\$99,389	\$13,500	\$112,889
Insurance	\$91,406	\$11,942	\$103,348
Manufacturing	\$85,919	\$9,577	\$95,496
Media/Publishing/Information	\$96,062	\$9,288	\$105,349
Non-Profits	\$83,667	\$5,030	\$88,697
Retail	\$84,511	\$8,289	\$92,800
Technology/IT/Web	\$104,000	\$11,391	\$115,391
Telecommunications	\$86,538	\$14,154	\$100,692
Transportation	\$74,778	\$3,556	\$78,333
Travel	\$74,200	\$5,467	\$79,667
Utilities/Energy	\$99,100	\$9,433	\$108,533
Other	\$83,636	\$11,818	\$95,455

“Marketing research almost always reports to marketing. And marketing directors are usually advertising types who do not fully understand the power of research. This holds us back.”

“Long hours, too much work to do in too little time, lack of appreciation.”

“That I don’t control the processes that need to be fixed.”

Of course, we have no way of knowing if the same person who posted a crabby response in the “like least” portion counterbalanced it with a sunnier reply to the “like most” question, so it’s hard to tell if researchers as a group are disgruntled or mostly happy. But it’s clear that, as with any job, researchers experience a host of joys and annoyances – minor and major – as they go about their day-to-day work. | Q

 **More salary data online**

The online version of this article (enter article ID 20100703 at www.quirks.com/articles) contains more charts and more verbatim responses on the highs and lows of life as a client-side researcher. For those of you on the vendor side, we’ll publish results of our research vendor salary survey in our July 26th e-newsletter.

“What do you like most about working in marketing research?”

The fun of sleuthing for information

“Building a story with the numbers is my favorite part.”

“Proving or dis-proving theories.”

“The combination of psychology (understanding why people think/ behave in a certain way) with math/stats/ analytics.”

Seeing research make a difference

“We drive the bus and get to decide where the bus is going!”

“The work is interesting and has a huge impact within our organization.”

“The opportunity to guide major strategic decisions about how one of the world’s most respected companies runs some of their business.”

“Customer insights are used to make decisions at my company. My research team act as consultants and are considered

the experts on customer understanding. There is pull for research and it is used, not shelved.”

“Involvement in highly strategic efforts that are important to the company. A seat at the table for virtually all key initiatives.”

“Directing marketing strategies based on research findings. Data is power!”

The general joys of the job

“The training and supervision of smart analysts.”

“The diverse group of people I work with.”

“I love being paid to learn and teach others and to create actionable insights that impact business strategy.”

“Analyzing data and presenting results. I know data and my industry as well as anyone I know.”

Helping internal clients get the data they need

“Being able to answer a question using the customer’s opinion rather than my

own, as most people do.”

“You get to help others with their business objectives, learn what others think, and not do the same thing day after day.”

“Turning information into data and data into decisions.”

“Finding out what people REALLY think as opposed to what we feel they should think.”

“Learning and understanding customer behavior - it’s all about WHY!”

Serving as the consumer’s voice within the company

“Communicate what customers need and deserve in a way that a company can improve its products and services.”

“I feel like I make a difference every day, in making our products and services fit our customers’ needs more closely.”

“Representing the consumer, connecting research methodologies to practical business applications, supporting and informing

business decisions, seeing direct business success coming out of consumer insights.”

Never a dull moment when you’re a researcher

“There is always some new or different challenge to deal with, and that keeps me entertained. I’d get bored if I had to do the same thing over and over again.”

“I like that projects end and I get to start something new when the next one comes up.”

“The fact that one year on, the results may be totally different.”

“Interesting mix of math, writing, strategy, meeting with people, etc.”

“The fact that everyday I learn something new . . . a new finding from research we’re conducting, a new product that we want to test with consumers, etc. In my job every new day is an opportunity to improve on yesterday.”

“Endless opportunities to learn new things. Your job is to listen, learn and teach. It’s great.”

Designed to engage

What is the impact of survey design on respondent engagement?

The impact of questionable online survey respondents on data quality is well-documented. Previous research—on research by our firm, MarketTools Inc., has shown that fake, duplicate or unengaged respondents compromise data quality. But what about the design of the survey, which may affect all respondents, with both good and bad intentions?

MarketTools conducted a comprehensive study that examines the effect of survey design on data quality and found that, in order to ensure the quality of research data, researchers must not only remove “bad” respondents from their samples, they must also design surveys that keep the good respondents engaged.

Are interrelated

Experienced researchers have long assumed that survey design, respondent engagement and data quality are interrelated. For example, it seems obvious that long and complex questionnaires will increase the likelihood of undesirable behaviors such as speeding and survey abandonment, and that data quality will suffer if there is a high percentage of unengaged respondents in the survey sample.

As we sought to understand and quantify the effect of survey design on respondent engagement and data quality, we used our firm’s TrueSample SurveyScore measurements from over 1,500 surveys and 800,000 responses to conduct a two-phase research study. Phase 1 of our research evaluated whether survey design influences the way respondents perceive a survey and how they behave while answering survey questions. Phase 2 of our research examined the effect design variables and engagement measures have on the quality of response data. Simply put, we sought to determine whether “good” respondents driven “bad” by poorly designed and complex surveys could lead to reduced data quality. If so, we can help researchers to optimize their survey design to improve overall data quality.

snapshot

When researchers effectively use the many facets of survey design at their disposal, they make great strides toward enhancing the respondent’s experience and the quality of the data they provide.

Show the impact

TrueSample SurveyScore is designed to be an objective measure of survey engagement and help show researchers the impact that survey design has on engagement. It is a function of both experiential variables, such as respondents’ rating of the survey taking experience, and behavioral variables, such as survey abandonment and speeding. To date, MarketTools



By Nallan Suresh
and Michael Conklin

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has collected SurveyScore data for more than 10,000 surveys, with over 2.6 million completes. These surveys span product categories (such as food and beverage, financial, technology, entertainment, health and beauty, health care and travel) and research methods (such as concept screening, line and package optimization, and attitude and usage studies).

Our team sought to determine whether certain survey design variables could reliably predict the composite engagement measure of respondent behavior and perception that comprises TrueSample SurveyScore. We built a model to predict engagement using survey design variables and the TrueSample SurveyScore database as inputs. Predictability is an indication that survey design impacts engagement in a consistent way, implying that we could recommend adjustments to the design variables that would minimize adverse effects on engagement. Specifically, we modeled the impact of more than 20 survey design variables (independent variables) that are

within the control of survey designers – such as survey length, and total word count – on several respondent engagement measures (dependent variables) reflecting the respondents’ perception of the survey and behavior during the survey.

Clear indication

The research revealed that a multivariate model that captures the complex interaction among design variables is able to predict overall engagement, comprised of both experiential and behavioral variables. The fact that the impact of these variables is predictable provides a clear indication that survey design directly influences respondent perception and behavior, i.e., engagement, in a consistent way. This means that survey designers do have some degree of control in improving engagement. This also means that the SurveyScore can be predicted prior to deploying a survey to help guide design modifications.

We uncovered another interesting finding when we examined the influence of particular survey

design elements on specific aspects of engagement, such as survey rating or partial rates. While survey length proved to be generally predictive of most respondent engagement measures, there was wide variation in the design variables that were most influential in driving various measures of engagement. For example, for the survey rating measure, one of the most predictive design variables was the elapsed time per page of the survey. For the speeding measure, however, elapsed time per page was not even in the top five most important design variables.

Thus, adjusting just one parameter may not be sufficient to elicit desirable behavior from respondents, nor will it singlehandedly improve their perception of the survey-taking experience. Instead, the findings reveal that engagement is driven by a complex interaction among design variables.

This means that simple survey design guidelines or rules are inadequate for motivating the desired respondent engagement. There is no axiom that applies in all cases, such



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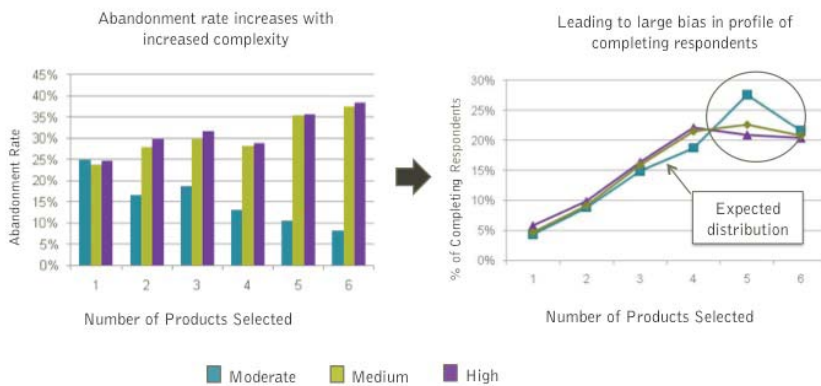
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Figure 1: Higher Abandonment Rates Increase the Odds of Sample Bias



to determine whether engagement had an effect on data quality. The TrueSample SurveyScore database allowed us to test this hypothesis. MarketTools fielded three surveys with varying levels of complexity, categorized as moderate, medium and high. We analyzed 1,000 completes for each survey. The experimental surveys had the same series of questions about demographics, products purchased, etc., but differed based on the number of products respondents said they purchased. The level of complexity increased as more products were chosen and more brand attribute questions were displayed. In the moderate category, respondents were asked one question per product. In the medium-complexity category, respondents received 17 brand attribute questions per product. In the high-complexity category, respondents were asked 17 questions for every product chosen, plus additional open-ended questions.

as, “Surveys that require more than 20 minutes result in poor respondent engagement.” In fact, our researchers uncovered several examples of long surveys that had a higher-than-normal survey rating as well as a lower-than-normal partial rate, which would run contrary to what one would expect if length alone were a deciding variable.

Conversely, we found examples of short surveys that had a lower-than-normal survey rating because of the design of other variables.

An effect on quality

With the impact of survey design on respondent engagement established, the research team endeavored

We computed and compared the SurveyScore for the three surveys. Predictably, it dropped precipitously

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with the higher complexity levels. The medium- and high-complexity surveys received an extremely low score, as shown in Table 1.

Next, we conducted a series of statistical tests to evaluate the effect of respondent engagement on data quality. By conducting different analyses, we were able to examine data quality from various angles for a more comprehensive review. Specifically, we investigated the following.

Will unengaging surveys:

- Increase the odds of sample bias?
- Make respondents more apt to answer the same question inconsistently?
- Make respondents more prone to random answer choices?
- Make respondents more likely to provide inconsistent answer choices?
- Make respondents tend to select “none” as an answer choice?

We examined whether a high abandonment rate could cause bias in completed responses and thereby reduce overall data quality. In other words, as the surveys became more complicated and their SurveyScore dropped, did the makeup of the respondents change and create the potential for biased data?

The answer was yes. As illustrated in the diagram in Figure 1, respondents who completed the medium- or high-complexity surveys were more tolerant of the increased question load (the more products they selected, the more questions they were asked), leading to bias in those groups compared to the group of respondents who completed the moderate survey. The graph on the left of Figure 1 shows that as the number of products selected increased – thereby increasing the number of questions to be answered – the partial or abandonment rate grew for the more complicated surveys.

As shown in the graph on the right of Figure 1, of those respondents who did not abandon the survey, the percentage who selected five products was much lower for the medium- and high-complexity surveys than it was for the moderate survey. So, while the

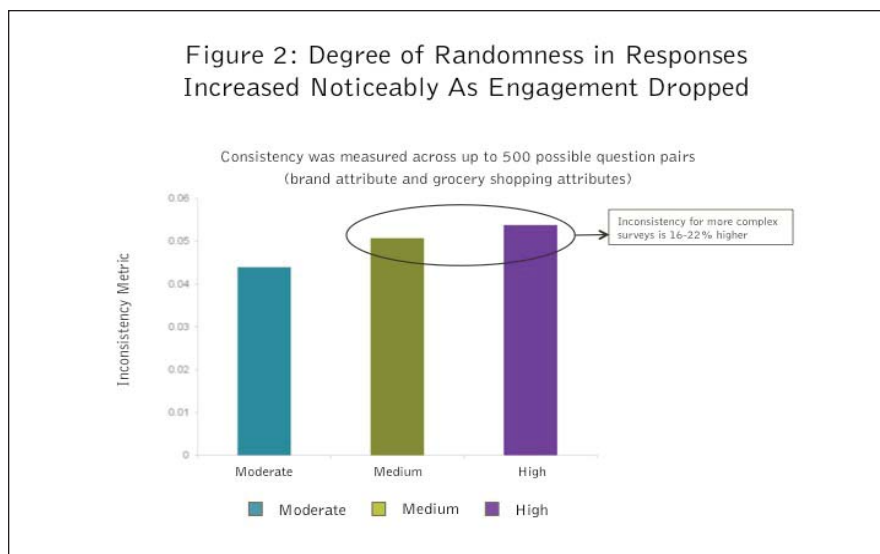


Table 1: Survey Complexity (High to Low Engagement)

Design Attributes	Moderate Complexity SurveyScore = 35	Medium Complexity SurveyScore = 9	High Complexity SurveyScore = 4
Survey length (min)	9	16	17
Total survey pages	38	39	43
Total number of questions	40	41	45
Avg. number of rows/matrix	4	13	13
Avg. number of columns/matrix	5	6	6
Total number of matrix questions	8	8	8

actual data had a higher percentage of respondents that had purchased five products, many of these did not make it through the survey, resulting in sample bias.

Our research also tested whether the respondents’ ability to answer the same questions consistently during a single survey was a function of the survey’s complexity. We measured the consistency of the responses to questions that were repeated in separate sections of the survey, and we found that recall discrepancies increased as the SurveyScore dropped – proof that more complicated surveys lead to inconsistent and unreliable responses and lower data quality.

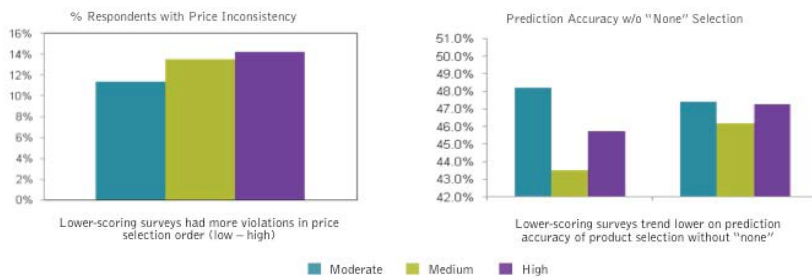
We then measured the consistency of responses across all possible question pairs to develop an inconsistency metric. This metric enabled us to determine if a given selection was random or closer to the expected response. The more unusual this pairing was – meaning the likelihood of its occurrence was low given the incidence of all the other options for these questions – the higher the

departure from the expected value and the higher the inconsistency metric. Our finding was that inconsistency increased as the SurveyScore dropped, contributing to lower overall data quality for the more complex surveys (Figure 2).

Finally, we sought to determine if surveys with a low SurveyScore caused respondents to lose focus and provide inconsistent or unpredictable responses. To measure the choice predictability of each of the surveys, we used a discrete choice model (DCM) exercise (Figure 3). Specifically, we tried to predict respondents’ product selections on two tasks based on their selections on seven other tasks (DCM sections were identical across all surveys). We asked, for example, that respondents select the one product they would prefer to buy from each page, if any, and based on their answers to previous questions, we tried to predict their response. The respondents could also choose “none” as a response, indicating that they would choose none of the products.

During this exercise, we noticed

Figure 3: Choice Consistency - Discrete Choice Model Prediction Accuracy Dropped With Engagement



that the accuracy of the prediction (when the selection of “none” was also included) was 75-79 percent for all surveys, a relatively high prediction rate. However, the model for the medium- and high-complexity surveys gave a much greater emphasis to the “none” selection, meaning that the respondents for these surveys tended to select no product, as opposed to one of the available products. Once we removed the “none”

option from our model, the prediction accuracy dropped significantly for the high-complexity survey. In addition, the lower-scoring surveys had more violations in price selection order, meaning the respondents tended to violate the expected order of selecting a lower unit price over a higher one. The net result: surveys with a low SurveyScore translated to lower predictability and thus to lower data quality.

Take responsibility

Our conclusion? Researchers must take responsibility for data quality by removing bad respondents and designing surveys that keep good respondents engaged. Research professionals now have evidence that survey design not only influences whether respondents abandon a survey but also impacts the data for those who complete it.

The ability to predict the effect of various survey design variables on respondent engagement will help survey designers maximize engagement to increase the reliability of their data. Researchers no longer have to assume that a long survey will jeopardize the quality of the results, since we have shown that it is possible to compensate for the adverse effects of certain design variables by adjusting others. By using engagement measurement and prediction tools, researchers can know that survey design affects data quality, can measure engagement to help improve survey design and optimize design to enhance the reliability of results. | Q

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Intelligent (survey) design

Using a strong questionnaire to harvest high-quality data

The advent of user-friendly online survey tools in recent years has created the illusion that anybody can write a survey questionnaire. After all, how hard can it be? It's like asking questions in a conversation, many think. However, there are many methodological issues to consider when creating a questionnaire if you want to gather high-quality data in a survey. The following are 10 issues that arise in survey design.

1. Data collection mode

Some questions may elicit different answers if asked in an online survey, a telephone interview, a paper survey or a face-to-face interview. While words in phone surveys or in-person interviews are given more importance because of the conversational format, visual design elements have a bigger impact in how questions are read and interpreted in online surveys. Be aware of the types of questions that are a good fit for online surveys.

2. Respondent effort

There are questions that put a heavier burden on the respondent's working memory and comprehension or are likely to elicit higher non-response if asked in different data collection modes. Experience tells us that asking a ranking question with 10 items over the phone can overwhelm respondents. In online surveys, rating questions in matrix format with a large number of items increases fatigue and boredom and often leads respondents to adopt a "satisficing" behavior. Satisficing occurs when respondents select the same scale-point to rate all items without giving them too much thought. They go for the most effortless mental activity trying to satisfy the question requirement, rather than work on finding the optimal answers that best represent their opinion.

3. Question wording

Formulating a question with the right wording so it accurately reflects the issue of interest is one of the hardest parts in writing questionnaires. You may have seen political polls getting different answers depending on how a question is crafted. Data errors can creep into a survey if we use unfamiliar, complex or technically-inaccurate words; ask more than one question at a time;

snapshot

When designing a survey questionnaire, researchers and non-researchers alike must consider the potential impact that wording, sequence, structure, layout, etc., can have on data quality. The author offers 10 issues to consider.



By Michaela Mora

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use incomplete sentences; use abstract or vague concepts; make the questions too wordy; or ask questions without a clear task.

Another issue related to question wording is the risk of introducing bias by leading the respondent in a particular direction. I recently received a mail survey sponsored by the Republican Party to represent the opinion of voters in my congressional district and one of the questions was:

“Do you think the record trillion-dollar federal deficit the Democrats are creating with their out-of-control spending is going to have disastrous consequences for our nation?”

Could this question be more biased? The use of adjectives such as “record,” “out-of-control” and “disastrous” makes it really clear what the expected answer is and what the intentions of the sponsor are.

4. Question sequence

Questions should follow a logical flow. Order inconsistencies can confuse respondents and bias the results. For instance if you are measuring brand awareness and ask respondents to recognize brands they are familiar with before asking which brands first come to mind, you are rendering the results from the latter question worthless since respondents can't avoid thinking of brands they just saw in the first question. This seems basic, but it happens.

5. Question format

Questions can be closed-ended or open-ended. Closed-ended questions provide answer choices, while open-ended questions ask respon-

dents to answer in their own words. Each type of question serves different research objectives and has its own limitations. The key issues here are related to the level of detail and information richness we need; our previous knowledge about the topic; and whether to influence respondents' answers. For example, for closed-ended questions we need to decide what the answer choices should be and in which order they should appear. This requires we know enough about the topic to provide answer options that capture the information accurately.

6. Information accuracy

Some questions yield more accurate information than others. Respondents can answer questions about their gender and age accurately, but when it comes to attitudes and opinions on a particular issue, many may not have a clear answer. Overall, attitudes and opinion questions should be worded in a way that best reflects how respondents think and talk about a particular issue so that we can tease out information that is difficult for the respondent to articulate. However, some questions need to be skipped when they don't apply to the respondents' experience or the issue is so irrelevant to the respondent that s/he doesn't have a formed opinion about it. In the case in which attitude statements appear grouped in a matrix format and some may not apply to a respondents (e.g., a customer satisfaction survey after a phone call to customer support), it is necessary to include a “Not sure/Don't know/Not applicable” option to avoid introducing measurement

error in the data.

For example, the other day I received an online customer satisfaction survey from BlackBerry after a call I made to its support desk. The survey had a question in which I was asked to rate the representative who took my call on different aspects. One of them was “Timely Updates: Regular status updates were provided regarding your service request.” I wouldn't know how to answer this, since the issue I called for didn't require regular updates. Luckily, they had a “Not applicable” option, otherwise I would have been forced to lie, and one side of the scale would be as good as the other.

7. Measured behaviors

People tend to have less-precise memories of mundane behaviors they engage in on regular basis, and usually they do not categorize events by periods of times (e.g., week, month and year). We need to consider appropriate reference periods for the type of behavior we want to measure. Asking “Have you purchased any piece of clothing in the last seven days?” will yield a more accurate behavior measure than asking “Have you purchased any piece of clothing in the last six months?”

Measured behavior should be relevant to the respondent and capture his or her potential state of mind. This is valid particularly when we use rating questions and have to decide whether to include a neutral mid-point. A lot of research has been conducted in this realm, particularly by psychologists concerned with scale development, but no definitive answer has been found

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and the debate continues. Some studies find support for excluding it while others for including it depending on the subject, audience and type of question.

Those against a neutral point argue that by including it we give respondents an easy way to avoid taking a position on a particular issue. There is also the argument that equates including a neutral point to

wasting research dollars, since this information would not be of much value or at worst it would distort the results. This camp advocates for avoiding the use of a neutral point and forcing respondents to tell us on which side of the issue they are.

However, consumers make decisions all day long and many times find themselves idling in neutral. A neutral point can reflect

any of these scenarios: we feel ambivalent about the issue and could go either way; we don't have an opinion about the issue due to lack of knowledge or experience; we never developed an opinion about the issue because we find it irrelevant; we don't want to give our real opinion if it is not considered socially desirable; or we don't remember a particular

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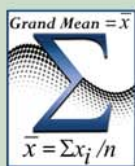
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experience related to the issue that is being rated.

By forcing respondents to take a stand when they don't have a formed opinion about something, we introduce measurement error in the data since we are not capturing a plausible psychological scenario in which respondents may find themselves. This is yet another reason to include a "Not sure/Don't know/Not applicable" option in addition to a neutral point.

8. Question structure

Questions have different parts that must work in harmony to capture high-quality data. These are the question stem (e.g., What is your age?), additional instructions (e.g., Select one answer) and response options, if any (e.g., Under 18, 19 to 24, 25+). The wrong combination can leave respondents baffled about how to answer a question. Consider the example below.

Overlapping answer options:

What is your household income? Select one answer.

1. Under \$25,000
2. \$25,000 to \$50,000
3. \$50,000 to \$75,000
4. \$75,000 +

So, which answer should I choose if my household income is \$50,000? Is it option two or option three?

Conflict in meaning between

different parts of the question:

Please indicate the products you use most often. Select all that apply.

- Cell phone
- Toaster
- Microwave oven
- Vacuum cleaner

Here, the question stem gets confusing by asking for "products," which suggests multiple answers, and also asking for the "most often used," which suggests a single answer. The additional instructions also indicate that multiple answers are allowed. Due to these inconsistencies, there is a lot of ambiguity in the question, leading some respondents to choose a single answer and others to select multiple answers. So, how do we know the actual frequency of usage of these products? We will never know. Some products will be underrepresented and some will be overrepresented. Would you trust the data from this question? I wouldn't.

9. Visual layout

Using design elements in an inconsistent way can increase the burden put on the respondent in trying to understand the meaning of what is asked. For example, encountering different font sizes and colors across questions forces the respondent to relearn their meaning every time they are used.

Also, presenting scales with different directions (positive to negative

or vice versa) in rating questions within the same survey increases measurement error as respondents often assume all rating questions have the same scale direction even when the instructions explain the meaning of the end points of the scale. For instance, if a preference question using a 1-7 scale where 1 means "the most preferred" is followed by an importance question, also using a 1-7 scale, but where 1 means "the least important," respondents who are not paying attention to the instructions (which is quite common) are likely to assume that the 1 in the importance question means "the most important." I have seen many examples of this problem, when respondents are asked a follow-up question conditioned on their previous answers and then they realize their mistake and tell us they actually meant to say the opposite.

10. Analytical plan

Based on the research object, both the type of information requested and the question format are important for the type of analysis we plan to perform once the data is collected. If you want to develop a customer satisfaction model using linear regression analysis and the dependent variable is an open-ended question, you can forget about modeling anything. This seems obvious, but I have seen non-researchers writing questionnaires without thinking how they will analyze the data and then come to me asking for analyses that are not appropriate for the data collected.

There is also the question of whether we want to replicate the results, track certain events or just run a one-time ad hoc analysis. If the goal is to track certain metrics, time and care should be dedicated to crafting tracking questions, as slight changes in wording can change the meaning of a question and thus its results.

On your way

If you take each of these aspects of survey writing into consideration, you will be on your way to creating surveys that produce valid data and can support with confidence strategic and tactical decisions for your business. | Q

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Online research still reigns supreme

A report on the 2009 Globalpark Market Research Software Survey

The findings from the 2009 Globalpark Annual Market Research Software Survey offer some unique insights into how the research industry goes about its business; how it is looking to the future and some of the concerns it has today. It also puts into perspective some of the latest trends in the industry. This year's study took a look at mobile research and communities.

Largely it finds the jury is still out on mobile research, and some way from reaching any consensus on its viability, with proponents and detractors in equal measures. We also learned that, despite the attention that research communities are commanding, actual working research communities are still surprisingly thin on the ground.

The survey is now in its sixth year and that means some of the survey's tracker questions are revealing some interesting long-term trends. As we conducted this research in a recession, we looked to see if it was having an impact on technology and processes. We found little in the way of direct evidence in attitudes or approaches. Indirectly, though, it perhaps manifested itself in a much greater reluctance to participate in the survey, despite us casting our sampling net much wider, and involving two panel companies to supplement our own sample. We failed even to make our target of 200 completes in the survey, achieving only 188 this time.

It's a 15-minute online survey among senior decision makers involved in technology in research companies in three global regions: North America, Europe and Asia-Pacific. We allow only one participant from any company, or, in the case of multinational companies, in that country or region. We don't claim the survey is statistically representative, as ours is clearly a convenience sample, but we do still feel it offers some useful insights into what is actually happening in the industry away from the spotlights of publicity.

We're very grateful to Globalpark, who sponsored the 2009 survey in an exemplary manner, and also to the generosity of our participants for letting us share their thoughts with you. For this article, we have picked eight topics we thought might be of interest. There's more in the full report, though, and it's available free of charge at www.meaning.uk.com/gmrss2009.

Modes of research

Each year, we ask respondents which

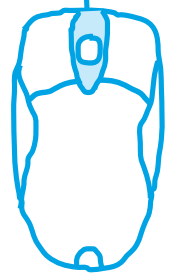
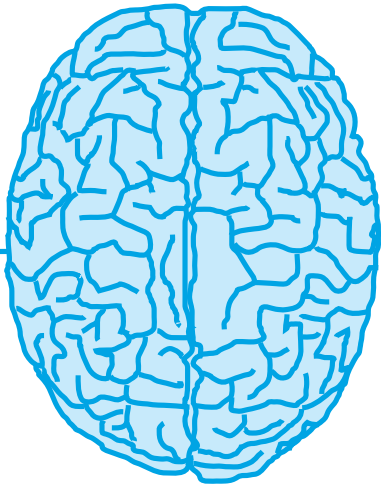


By Tim Macer
and Sheila Wilson

snapshot

This time around, results show that larger research companies are leading the charge when it comes to adopting mobile research techniques and, in spite of all the industry buzz, online communities have not yet taken off.

Editor's note: Tim Macer is managing director, and Sheila Wilson is an associate, at meaning ltd., the U.K.-based research software consultancy which carried out the study on which this article is based on behalf of Globalpark. They can be reached at tim@meaning.uk.com or at sheila@meaning.uk.com. To view this article online, enter article ID 20100706 at quirks.com/articles.



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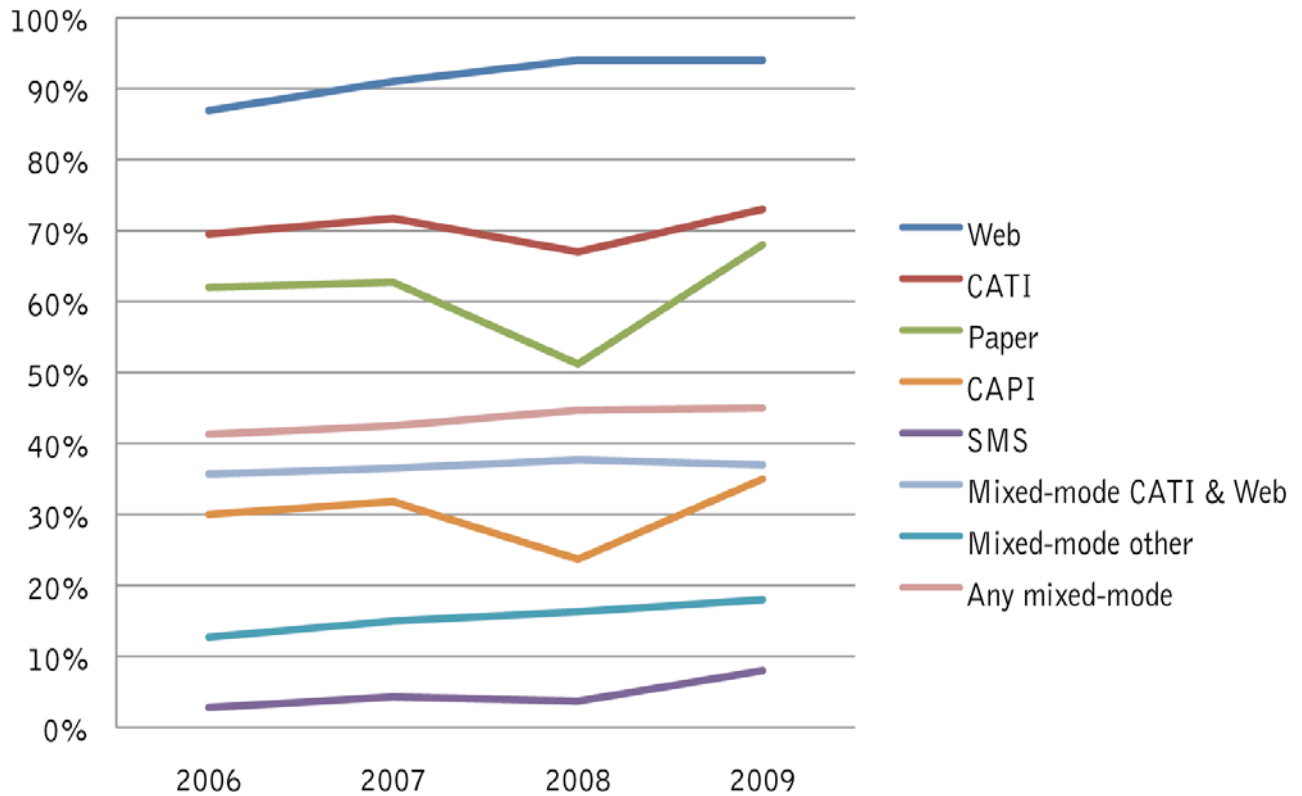
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Figure 1: Research Modes Practiced



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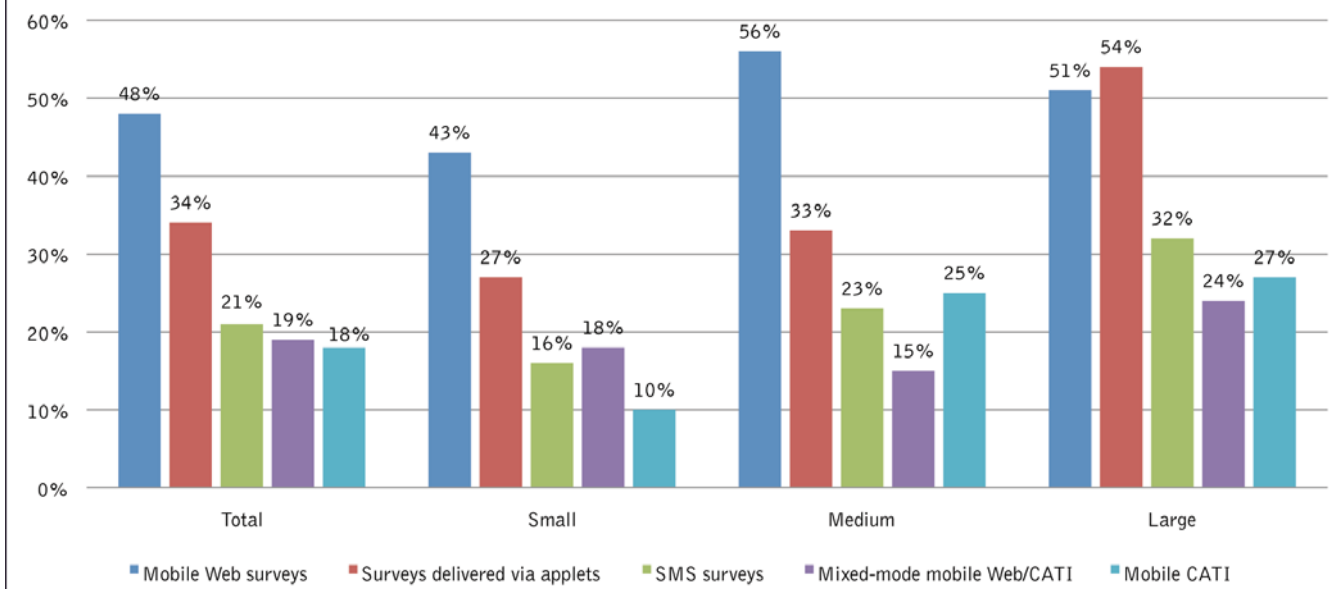
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modes of research their companies offer (Figure 1). Web reigns truly supreme, with nearly all respondents (94 percent) in 2009 saying that they provide online surveys. However, for the first time, the proportion of companies offering Web research has leveled off.

Although the percentage of firms offering CATI has remained at around 70 percent since 2006, volumes for CATI appear to be declining. In 2006 CATI provided 27 percent of total quantitative revenues and by 2009 this was 23 percent. Over the same period, Web has grown from 40 percent to 46 percent in our tracker. We need to point out that this is higher than in some other industry studies such as the ESOMAR Global Market Research report. In a further question, we asked respondents about their growth expectations for the future. Each year since 2006, companies have been predicting a small decline, and that predicted decline is growing larger each year.

With over one-third (37 percent) of market research companies offering mixed-mode CATI and Web,

Figure 2: Potential for Each Mobile Technology



it can be classed as a mainstream methodology but it does not appear to be developing. This seems slightly surprising given its obvious potential for increasing response rates and is probably a function of its greater complexity and cost, though methodological concerns remain an issue for many researchers.

The minority methodologies, especially SMS and “other mixed-mode” are growing, albeit slowly. Although not shown in Figure 1, our results indicate that large companies and those in North America are at the vanguard with these more unusual techniques, so perhaps these companies are pursuing a diversification strategy - nearly one in five (19 percent) of large companies offer SMS and over a quarter (27 percent) offer IVR.

These less-commonly practiced methodologies may offer lots of promise, but it has to be remembered that most (86 percent) of the revenues from quantitative research are from just three methodologies: Web, CATI and paper. The same has been true since we first started measuring this in 2006.

Mobile interviewing

Every year we introduce topical questions that reflect the buzz in the industry. In 2009, we focused on mobile interviewing - mobile self-

completion on a smartphone, iPhone, BlackBerry and the like, as opposed to mobile CAPI research. In this question we asked what kinds of mobile research offer the greatest potential for growth (Figure 2).

Our respondents thought that all technologies had potential, but rated HTML Web surveys delivered via the mobile device’s Web browser above the others. However, large companies slightly favor surveys via applets. It’s a more high-tech approach that gives a richer and more controlled interviewing environment, but it requires

a greater level of commitment from the participant, who needs to agree to download the applet to their device.

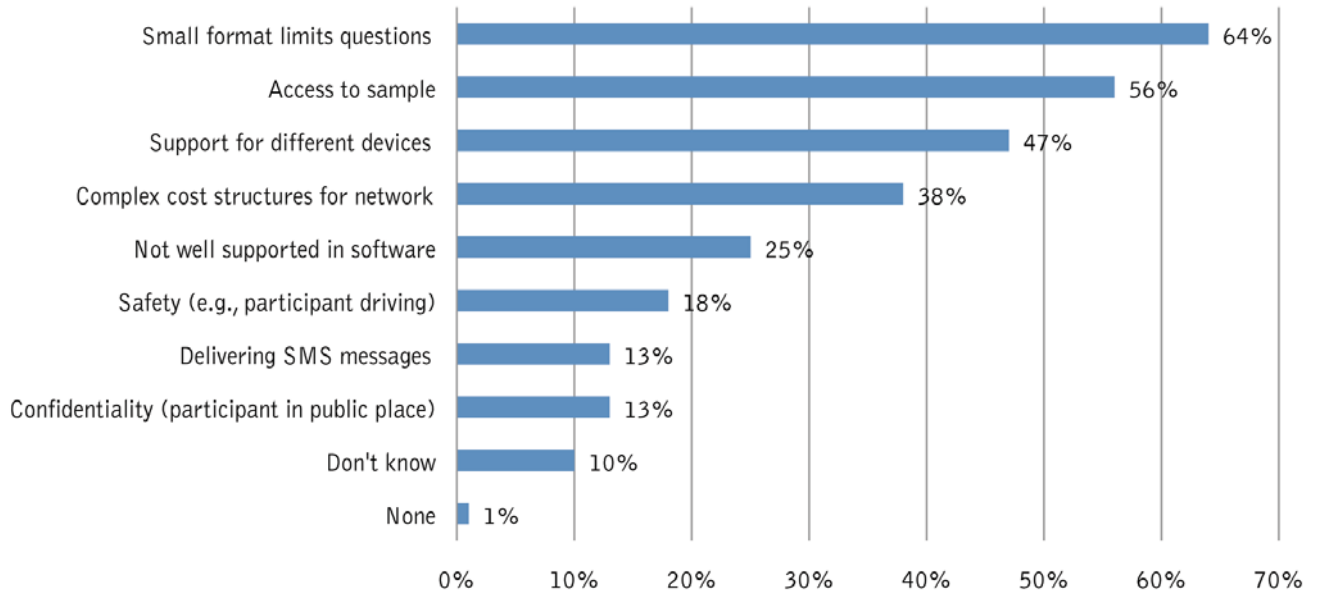
In fact, large companies are more optimistic about all methodologies, which probably tells software vendors where to target their sales efforts! And this appears to fit in with results elsewhere in the survey, which show that large companies appear to be far more positive about the viability of mobile research as a whole.

There are clearly advantages to mobile research, but, in another one of our mobile research questions, we

expands
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Figure 3: Challenges of Conducting Mobile Research



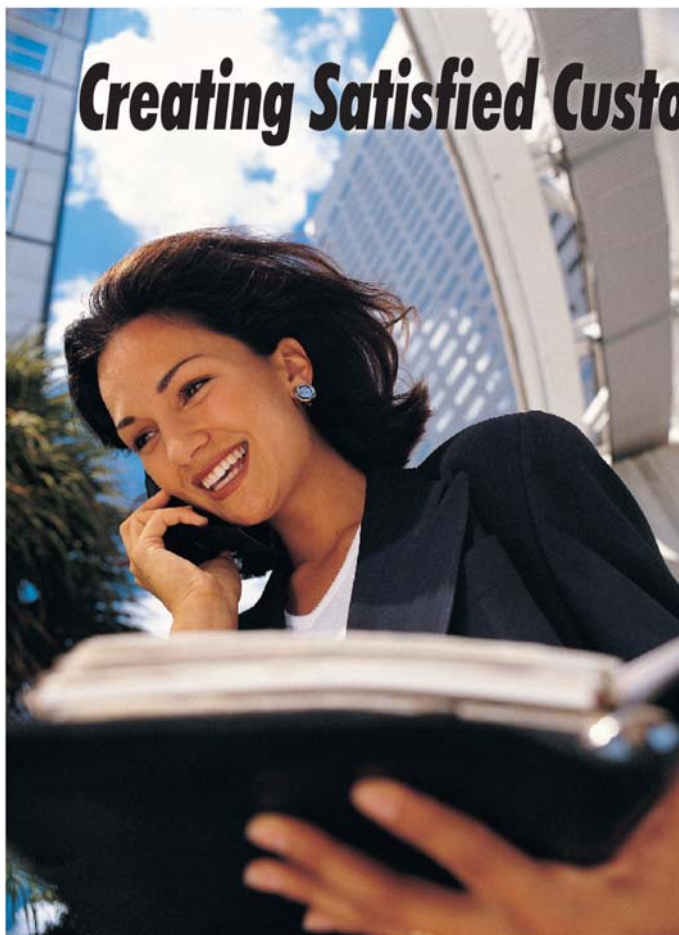
saw that the respondents view the main advantage of it being an additional way of reaching respondents and filling up quotas, although “faster turnaround” is seen as important by over a quarter (28 percent) of those

who took part in this study.

Major challenges

When asked about the major technical or operational challenges in mobile research (Figure 3), almost two-thirds

of respondents felt that the biggest challenge is the way the small format of a mobile device limits the type of questions you can ask. Yet the arrival of the iPhone raised the game and showed that many of



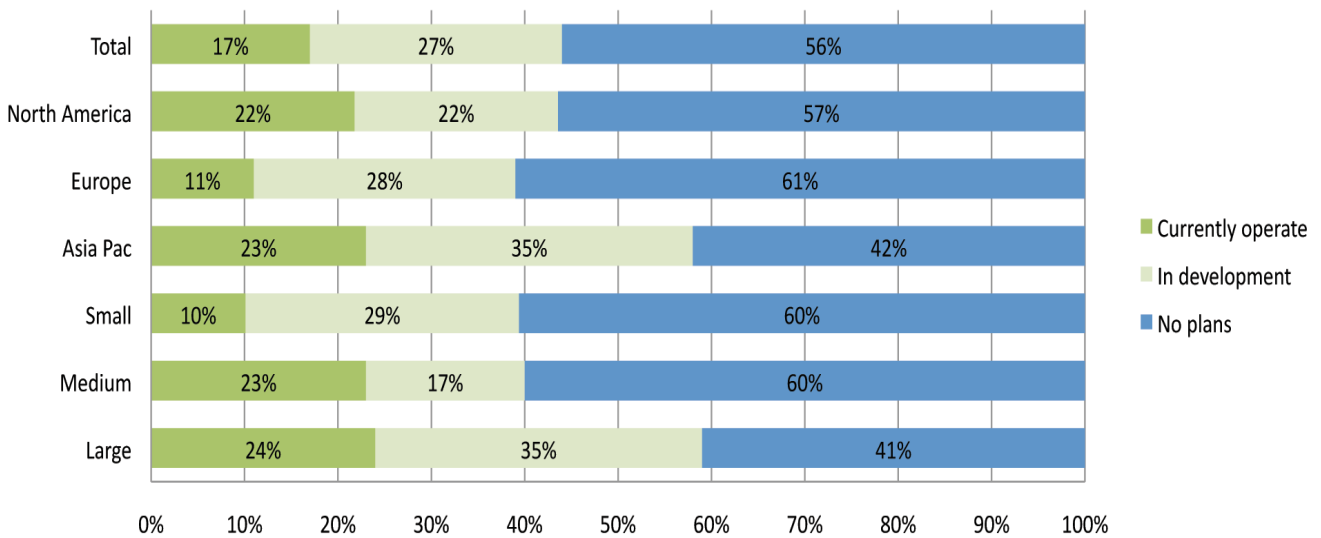
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Figure 4: Companies with Online Communities



those constraints fall away if the questionnaire is designed for that format and not simply ported over from a standard Web survey. (If only everyone had an iPhone!)

Presumably, over the years, others will catch up and more applets will appear, thus offering some relief over current limitations, although it is clear that researchers are always going to have to address the issue of less space with more creative and less-wordy questionnaire designs.

The ever-present difficulty of obtaining sample is the second-most important challenge, with over one-half of respondents highlighting this. But then, that was often cited as an insurmountable problem for online research in its early days.

Support for different devices and complex cost structures of different networks is a minefield, especially when conducting international research. We are quite surprised these challenges are not even higher up the list.

“Not well-supported in the software” is relatively low down the list of challenges but we suspect that this lies at the second hurdle, once the viability of the channel is accepted. It should not be read as a vote of confidence in the software. The actual tools on offer are largely from niche players, and there is a limited choice available. Only a handful of the online or mixed-mode data collection suites

offer integrated support for mobile at present. None of this is surprising given that the slice of the action is less than 1 percent of quantitative revenue, but demand for these applications is bound to increase, we predict.

Online communities

The survey also looked at how many market research companies in our study are operating online communities (Figure 4). Online communities have clearly not yet taken off in a way you might anticipate from the buzz that they are creating at conferences and in the research press,

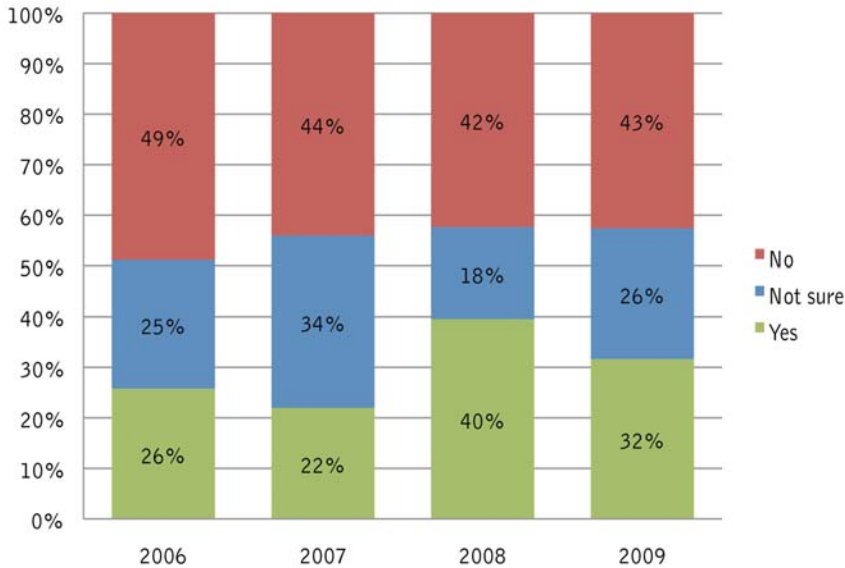
with only one in six companies (17 percent) operating any online communities. Indeed, over one-half (56 percent) have no plans to start any online communities.

Even among the minority who are running online communities, they are still in the early-adoption stage. We learned in a follow-on question that 59 percent of companies are operating three or fewer communities and 35 percent are operating only one. Speaking to practitioners, it is clear that a major issue is the time and effort it takes to run even one community – and when budgets are as

enhances the respondent
EXPERIENCE

SSI
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Figure 5: Changing Software



tight as they are today, it's hard to sell this work and make a profit.

Large companies and those in Asia-Pacific seem further ahead, since these two groups have a noticeably higher proportion of companies who already operate communities or have

them in development. In contrast, communities seem to be very rare in small companies and in Europe, with only 10 percent and 11 percent, respectively, of these companies already running communities.

Our general impression is that

most of the industry is holding back from online communities, even though there is a reasonable amount of technology available now that is specifically designed for market research communities.

To try to tease out whether the industry does differentiate between panels and communities, we asked respondents how they felt communities differed from conventional panels. The top three differentiators cited were that members interact with each other (51 percent), that they focus in an area of particular interest to the respondent (49 percent) and that respondents are more motivated to participate (43 percent). Rather tellingly, over a third (38 percent) of respondents said that community research is not as rigorous as panel research. Assuming that the make-up of our sample is overtly aligned with quantitative research, and that the very next ranked item was that communities are "more qualitative than quantitative" we read this as the oft-rehearsed accusations about rigor that fly from one camp to the other.

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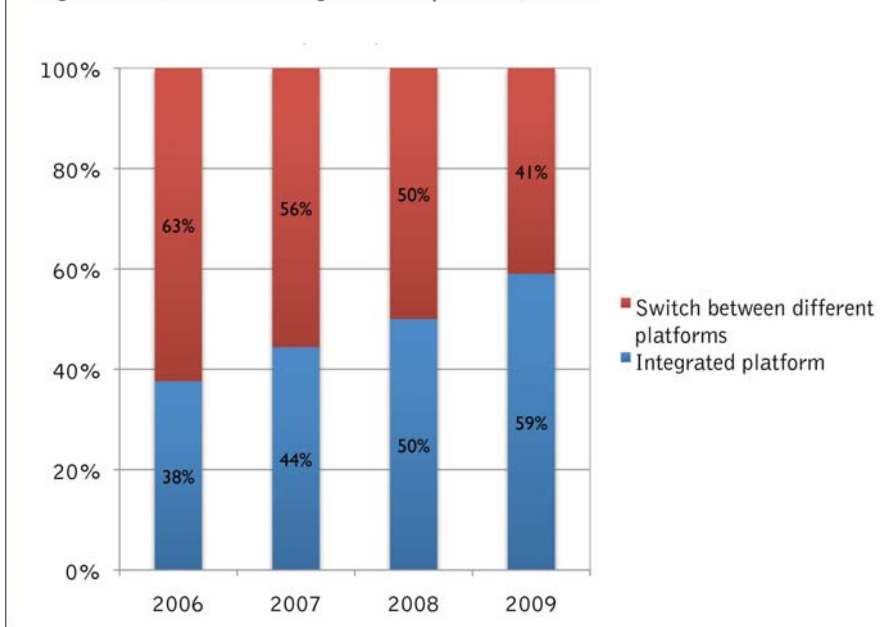


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Figure 6: Mixed modes – Integrated or Separate Platforms



Neither approach is immune to poor research design, and we can see no reason why communities cannot be administered rigorously. The dangers come in claims over representativity. But that should not devalue the insights that communities can provide, if research buyers can be persuaded to pay for them.

Changing software

One of our annual tracker questions asks respondents whether they are likely to change their software in the next year or two (Figure 5). Interestingly, even in a recession, a lot of companies were still planning to make a switch, with almost one-third (32 percent) wishing to change their software and a further quarter (26 percent) reviewing the situation (expressed as “undecided”). Only 43 percent plan to keep their existing software.

Every year we see that large companies are more likely to say that they plan to change their software, with over two-fifths (43 percent) in 2009 saying yes, compared with 31 percent of small companies and 21 percent of medium-sized companies. Small and medium-sized companies were less likely to change their software – 45 percent of small and 49 percent of medium-sized companies state no plans to change.

As we have seen in many questions in this iteration of the survey,

the large companies are more pro-change. Large market research businesses are getting larger and this growth tends to necessitate changes in technology. Presumably, large companies are also in a better position to experiment with new technologies because they are more likely to have specialist staff and they certainly have more financial clout. But this flies in the face of an assumption many may hold that the smaller companies, being more nimble and less bureaucratic, are therefore more innovative. On the contrary, it seems that the majority are more risk-averse.

What type of platform?

Another of our annual tracker questions is the extent to which research firms use an integrated software platform for online and other interviewing methods or use different platforms (Figure 6). There is a clear and sustained trend over the last four years that shows a shift toward using an integrated platform for multiple methodologies, and that seems set to run on for a little while yet.

We also asked respondents how important mixed-mode support was to them if they were buying new software. As in 2008, when this question was first introduced, nearly all respondents (84 percent) thought that it was important (moderately important or above) when choosing a new data collection tool. This is clearly food for thought for software developers!

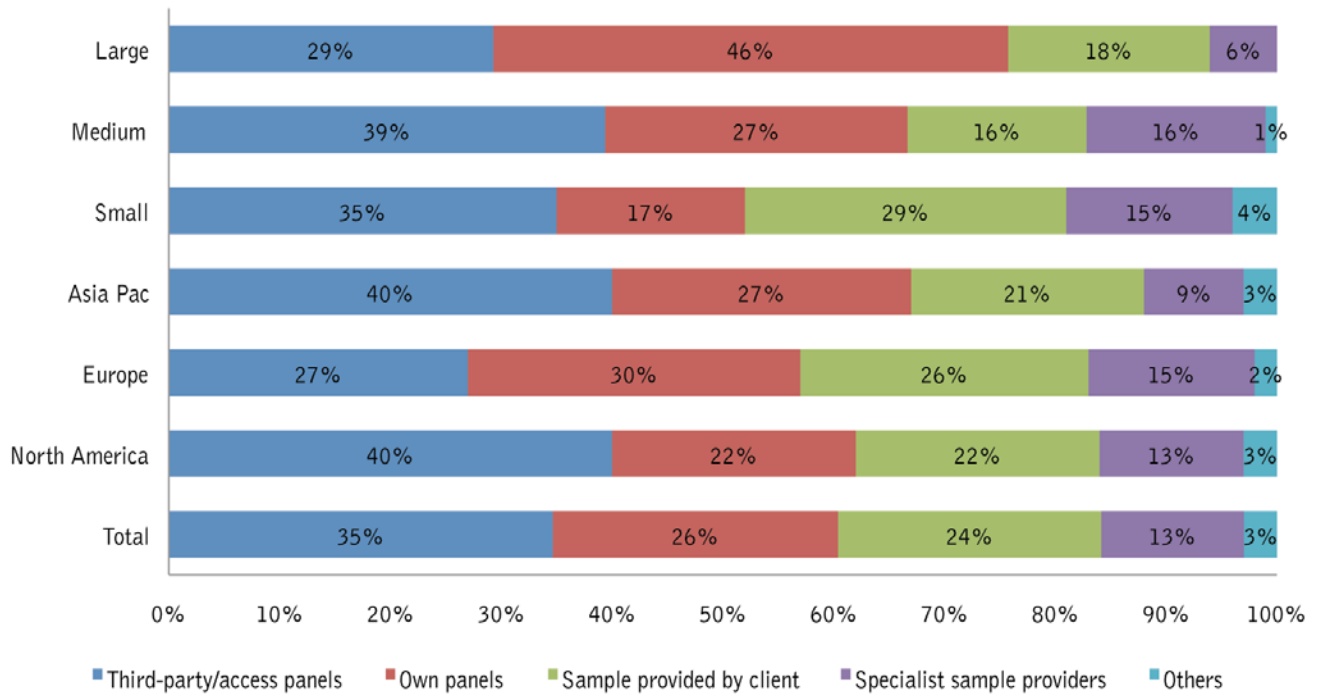
Sample sources

We asked respondents to tell us what proportion of their Web survey research relied on different sample sources, using revenue as our metric. As shown in Figure 7, the results vary by company size and region. Altogether, panels account for at least 61 percent of work by value. Client samples account for one quarter (24 percent).

Large firms appear to have invested much more in developing their own panels, judging by the much larger volumes they have shifted



Figure 7: Online Sample Sources



to their own proprietary panels: 46 percent, which is close to half their volumes, against 17 percent for

smaller firms, for whom such investment is obviously more difficult. The overall pattern is little changed

from the figures we obtained in 2008. Looking at this, it is perhaps a little surprising that large companies

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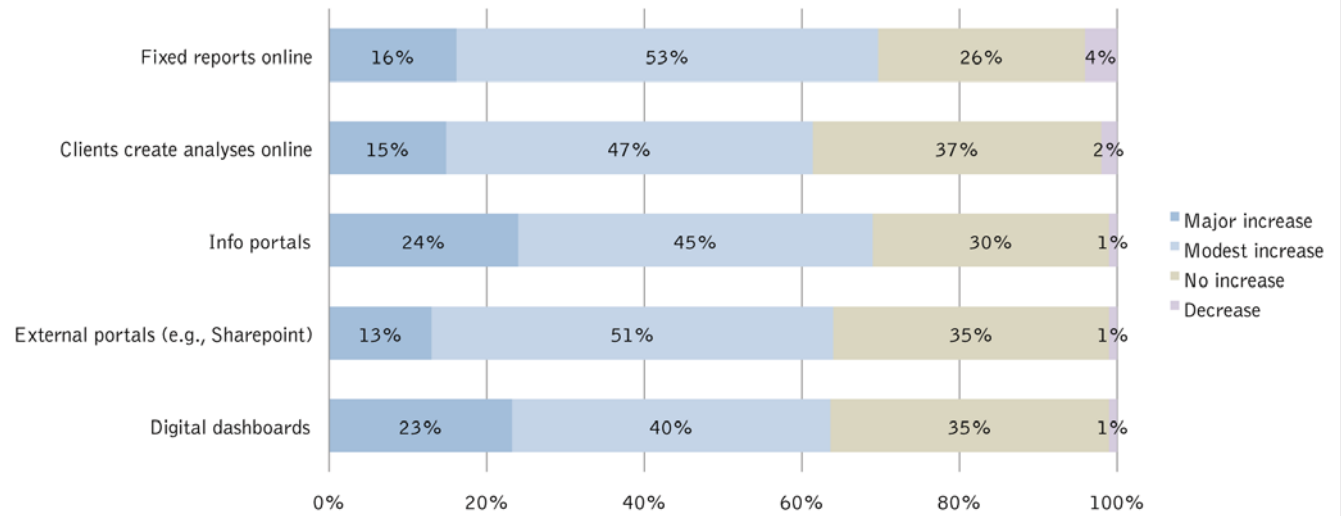
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Figure 8: Future Demand for Online Analysis and Reporting Tools



do not run more online communities (see Figure 4).

As in 2008, projects with sample from specialist providers contribute a small proportion of volume (13 percent). This is low considering that, in another question in which we asked the companies to state which sources of online sample they use, almost one-half of firms report using specialist sample providers. A similar number of companies use their own panels, yet the contribution from own panels is much higher, at 26 percent. Perhaps companies are favoring their own panels due to the greater control and greater potential for profitability.

Interestingly, in the question about the number of companies who use each sample source, it can be seen that all sample sources, except for own panels, are used more in North America than in other regions - and this is especially the case with access panels. Perhaps this is indicative of lower completion rates in that region.

Gauging future demand

To gain insight into the future demand for some of the online analysis and reporting systems, we asked respondents to say to what extent they anticipated an increase in demand over the next year.

There appears to be plenty of demand for online reporting of all types. Virtually nobody surveyed was anticipating any decline. As is the case with many questions in this study, large companies are more

advanced at anticipating change. At the detailed level (which we have not shown in Figure 8), large businesses anticipate a greater increase in demand than small and medium-sized companies in every area of online reporting. For example, 97 percent of large companies predict an increase in demand for external portals, against 55 percent of small companies.

Consistent with this, the large companies are expecting the greatest increase in demand in the more high-tech areas, such as portals, and the smallest increase in demand in the least technically-demanding delivery methods, such

as fixed online reports.

This is clearly another area where software developers need to take note. The demand in the market research industry is there, but the tools available still don't make it easy to publish data in a dynamic and Web-enabled way. Demand appears high for digital dashboards, for example, yet very few of the mainstream packages provide much practical support for creating them. If custom solutions are required - an increasingly common request in project briefs - this ultimately pushes up the cost to the client and diminishes profit to the research provider. | Q

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The price of perfection

Why researchers should embrace risk

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

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

The focus of this article is on the performance criteria used to evaluate the research function and how researchers should not be afraid to take a risk now and then.

Will be protected

In our study we asked researchers which metrics were used to evaluate their department and on which metrics they would like to be evaluated. In general, respondents said that in order for research departments to take more risks, they need to know they will be protected - it has to be a win-win for the research department and for the organization or it will not work. Researchers would like to be able to take more risk and focus on driving impact but they need to know senior management has their backs in the evaluation process.

Have you heard any of the following sentiments about marketing research? We believe they are common fallacies.

- “It is better to do one study perfectly than five studies well but imperfectly.”
- “We have no control over whether they use the research or not - we just have to accept that all we can do is present the information.”
- “It is better to address one research objective exhaustively and save others that cannot be addressed exhaustively for future studies.”
- “These are good questions, but they don’t belong in this study. Save them for a future study. This is not what this study was designed for. Everything has its proper place.”
- “We will share nothing at all, no results of any kind, until every-

snapshot

Continuing his series of articles on best practices in marketing research, Brett Hagins draws from in-depth interviews - and insights from a researcher at 3M - to argue that the ability to take a risk belongs in the skill set of all powerhouse research departments.



By Brett Hagins

Editor's note: Brett Hagins is the senior partner of Research Innovation and ROI Inc., Plano, Texas. He can be reached at bhagins@researchinnovationandroi.com. Additional information on the study mentioned in this article is available at www.researchinnovationandroi.com. To view this article online, enter article ID 20100707 at quirks.com/articles.



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thing is totally and completely buttoned up. I know they need the results now to make a decision, but they should have come to us earlier. Next time they will know.”

- “It’s better not to share anything at all than to share something that might be misinterpreted.”

Some research departments are doing a better job of minimizing risk to themselves than they are to their company. If the research department is not willing to take small risks with research, then others end up taking much bigger risks with far greater dollar amounts. Let’s look at the consequences of each of these views.

“It is better to do one study perfectly than five studies well but imperfectly.”

There are different degrees of mistakes. Senior management needs to hold research accountable for mistakes of omission as well as commission. Almost 40 percent of respondents in our study said they would like to be evaluated on a willingness to make mistakes to drive innovation or achieve more important goals.

“We have no control over whether they use the research or not - we just have to accept that all we can do is present the information.”

While it is true that researchers have less control over whether information is used than that PowerPoint slide that they have redone 30 times, it is not true to say they have no control.

As part of our study, we conducted depth interviews among people in leading research departments who had truly driven substantial value to their business, with an eye toward developing specific case studies on how to overcome common problems that hurt research’s impact. Out of the interviews emerged a broader set of business skills that have to be mastered in addition to technical research skills. They include such things as:

Business problem diagnosis.

Going from stated research objectives to underlying business issues.

Prioritization. Have screen-

ing processes in place to make sure departments are focused on areas with the most impact to the business. The top-performing research departments do fewer studies and waste less time on lower-value requests.

Marketing skills. The best researchers are also more talented marketers and strategists than the people they are supporting.

In-depth knowledge of products, services and industry trends.

Integration of research knowledge with financial metrics. The ability to translate research findings into strong business cases that will drive action.

An entrepreneurial spirit and drive. Always looking for areas of opportunity.

Sales and persuasion skills. If all world-class salespeople out there handed someone a piece of marketing collateral and then did nothing to close the sale, the economy would come to a grinding halt. This is analogous to a researcher presenting a study, having everyone thank them for the “great data” and then thinking that they have done all they can do.

Let’s look at the next two sentiments.

“It is better to address one research objective exhaustively and exclude others that cannot be addressed exhaustively for future studies.”

“These are good questions, but they don’t belong in this study. Save them for a future study. This is not what this study was designed for. Everything has its proper place.”

Here’s the problem with this thinking: No one has unlimited budget or time. A lot of these subsequent studies never get done. People will continue to make decisions with or without the involvement of research. Throwing a few non-traditional questions in a survey, even if they are a bit unconventional, is better than doing nothing – research is not an end in and of itself.

When I was on the client side, I would occasionally ask some very difficult or thought-provoking questions in surveys. Many of my colleagues likely wanted to say,

“Respondents are not going to understand that! It’s too much!” And while some respondents admitted they did not understand these questions, among the segment of the respondents who did understand, we got better insights from that question than we did most others. The results-oriented people in the organization deeply appreciated the effort.

Many researchers simply are not willing to take these kinds of smaller risks. In an odd way, they would prefer that their organization take much larger risks without the benefit of guidance.

Now, let’s look at the last two fallacies.

“We will share nothing at all, no results of any kind, until everything is totally and completely buttoned up. I know they need the results now to make a decision, but they should have come to us earlier. Next time they will know.”

“It’s better not to share anything at all than to share something that might be misinterpreted.”

The benefit to the business of having a bias toward sharing information should outweigh the occasional misuse or misinterpretation of data. The problem is, research departments are generally held accountable for what they do share, not for what they fail to communicate. This is why performance evaluation criteria are critical to protecting the research department and aligning its interests with the company interests.

Leadership attributes

One of our interviews was with Sandy Kelly, a market research manager at St. Paul-based 3M. She was kind of enough to share some of the leadership attributes used at her firm to evaluate the research function. While each organization is different, the following list can serve as a solid framework around which to build a similar set of guidelines more tailored to your specific situation.

Thinks from the outside in.

Creates and executes flexible, results-oriented strategy based on comprehensive understanding of

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customer, competitor and other outside interests and events relevant to the business.

Behaviors demonstrating this leadership attribute include (but are not limited to):

- Understands and anticipates market trends and customer needs.
- Demonstrates the ability to create and execute a strategy based on customer and client demands.
- Maintains flexibility to adjust if customer requirements or economic conditions change.
- Knows and anticipates the strategies, strengths and weaknesses of competitors.
- Knows how to be successful in the industry in which the business competes.
- Thinks “right to left” (results first).

Drives innovation and growth.

Expands revenue by encouraging sound analysis and development of novel approaches to opportunities and problems related to customers, products and markets.

Behaviors demonstrating this leadership attribute include:

- Redefines and stretches a market’s possibilities when setting goals.
- Drives an entrepreneurial mind-set through the organization.
- Cultivates an atmosphere in which revenue growth is accelerated via novel approaches to customers, products and markets.
- Asks questions and challenges the status quo in ways that lead to new and better ideas and processes; confronts reality.
- Ability to identify all options

through sound analysis and innovative approaches.

Develops, teaches and engages others.

Inspires other employees to take responsibility for company and unit performance in a way that compels employees to stretch, create and take risks to contribute fully to corporate and unit strategies and plans.

Behaviors demonstrating this leadership attribute include:

- Inspires, influences and motivates individuals and organizations about corporate and unit strategies, goals and plans; ensures alignment.
- Creates a winning atmosphere where people understand and are excited about the business.
- Fosters an environment where all employees can stretch, take risks, create, contribute and learn.
- Personalizes approach when developing employees.
- Celebrates successes and acknowledges disappointments in a way that motivates an even higher level of commitment and performance.
- Coaches and teaches others to grow their knowledge and skills.
- Develops and executes a succession plan that ensures a strong group of future candidates.
- Engages others through simple, consistent and candid communication.
- Leads inclusively, but decisively, in large-group settings.

Makes courageous decisions.

Manages ambiguous, complex or challenging situations with intelligence, speed and courage while holding oneself and others accountable for decisions, actions and performance.

Behaviors demonstrating this leadership attribute include:

- Proactively navigates internal and external ambiguity and complexity.
- Manages assertively through unforeseen difficulties.
- Clarifies the risks and opportunities inherent in the competitive landscape.
- Holds people accountable with meaningful and clear metrics and addresses performance issues.
- Acts with intelligence, speed and

courage to make tough business decisions even when data is limited.

- Confronts issues, takes responsibility and is accountable in words and actions.
- Forces change when necessary.

Leads with energy, passion and urgency.

Contributes to an environment where teams can quickly respond to changing circumstances and are highly motivated to succeed and win.

Behaviors demonstrating this leadership attribute include:

- Quickly responds to internal and external changing circumstances.
- Conveys a sense of urgency.
- Creates a vision of winning that captures the imagination of others.
- Speaks with energy and expression that engages others.
- Demonstrates confidence and relentless optimism.
- Is passionate about supporting and leveraging change.

Lives 3M values. Acts with uncompromising honesty, integrity and professional ethics in a way that constructively challenges processes and behaviors and encourages the inclusive behavior of others.

Behaviors demonstrating this leadership attribute include:

- Consistently earns the trust and respect of all 3M stakeholders.
- Actively encourages and rewards inclusive behavior.
- Constructively challenges processes and behaviors.
- Enhances 3M’s reputation and acts as a corporate ambassador.
- Actively supports 3M’s corporate values, human resource principles and business conduct policies.

Undergo a transformation

While no one company has a monopoly on galvanizing researchers to take risk and get outside their comfort zone, this is one set of criteria that may help. If research departments are to undergo a transformation from data providers to catalysts of improved business performance, metrics must be designed and enforced that encourage this transformation. | Q




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Knowing what you want

How clear research objectives can lead a project to success

A variety of problems can, and most likely will, occur when research objectives are not explicitly stated at the beginning of the project or are forgotten during the research process. So, the very first thing a marketing researcher should do is work with the client to identify and specify research objectives. Research objectives are statements generally describing the types and categories of information you want to obtain, from what target population and an explanation of the comparisons you want to make. As the project progresses through its stages, the research objectives guide and inform the project team.

Exploring or measuring. Research objectives need to specify whether you want to explore or to measure. Exploration leads to qualitative methodologies such as focus groups or in-depth interviews. If you know nothing about the market, it is important to explore it and obtain ideas before proceeding to a quantified measurement phase. A measurement objective leads to quantitative research methods yielding numerical data. When measurement is your objective, you need to specify what you want to measure. If a company is going to make a large, expensive or risky decision, it is particularly important to quantify market data for the purpose of minimizing the risk.

Categories of data. Research objectives are summary statements describing the categories of data you want to obtain. Market research objectives might include learning about buyer behaviors, attitudes, brand awareness, brand image, product satisfaction, product likes and dislikes, good and bad experiences, likelihood to consider, likelihood to purchase and so forth. In each case, these objectives need to be tailored to the specific project.

Definition of the target population. Research objectives need to be tied to one or more target populations. A target population must be able to provide the data you want.

For example, you can't ask technical questions to respondents who don't understand the technical jargon. You can't ask people to talk about their experience with a product if they have no experience in that category.

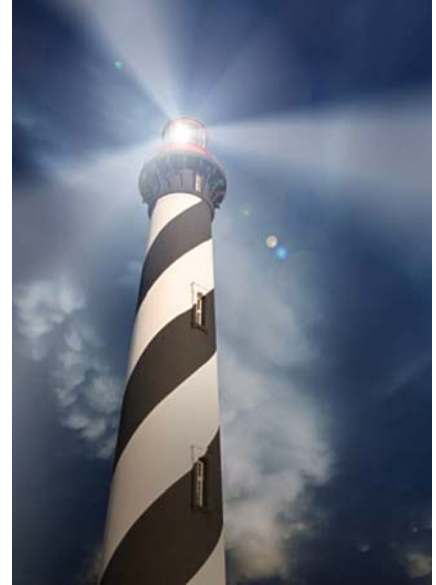
Comparisons. Often researchers want to compare segments of the population to each other or measure year-to-year changes.

Triggered that need

Research objectives are not invented out of thin air. When you have

snapshot

Defining research objectives at the beginning of a project can serve as a guiding light throughout the research process and help ensure that client needs are satisfied by asking the right questions to the right people the right way.



By Bonnie Eisenfeld

Editor's note: Bonnie Eisenfeld is a Philadelphia-based independent marketing research consultant. She can be reached at bwehl@earthlink.net. To view this article online, enter article ID 20100708 at quirks.com/articles.



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a need for market research, some marketing, business, strategy or communications problem or objective has triggered that need. When you conduct research, you should know how the findings will eventually be used, particularly if a decision is going to be made or an action taken based on the findings.

For example, a marketing objective might be to sell more of your product. You could conduct research among three target populations: 1) your customers, 2) customers of competing brands, and 3) people who potentially need your product.

Customer research. Your research objectives for customers would be to find out how they are using your product; what would motivate them to use more of your product; what other brands they are using; problems or dissatisfactions they might have with your brand; and other obstacles to more frequent usage.

Here is a simple example: A company produced and sold a unique over-the-counter health product that people used orally in liquid form. Sales had been declining over the past couple of years. A research project was designed with the objectives of learning the reasons for the decline and how to increase sales. By conducting interviews with customers, the company learned that customers did not like the taste of the product and used it less than they needed it. The solution was to reformulate the product so it would taste better. As a result, sales increased.

Users of competing brands. Research objectives for users of competing brands would be to seek to discover their opinions of that brand; what they like and dislike about that brand; dissatisfactions or problems they have with that brand; perceptions of your brand; and what would motivate them to try your brand.

For both sets of respondents, you could find out how they use the product and whether they have additional needs.

Potential users of your product. You could hypothesize a target population with a potential or latent need for your product. (They need it but they don't yet know it.) Your research objective would be to identify the

problems or needs that population is having for which your product provides a solution. Another objective could be to test your product concept to get respondents' opinions, likes and dislikes and likelihood to purchase.

Other sources of research objectives

Other starting points for market research might be the information needs for a strategic plan; an investment or acquisition; a new product launch; a new delivery or communication channel; or some other major company decision.

A review of published market research studies can assist you in defining appropriate research objectives. For example, a company wanted to measure employees' satisfaction with its communication program. From published research, they learned that other companies were measuring employees' trust in communications, a key element in defining satisfaction. Trust was then considered as an option for an additional research objective.

Limiting and prioritizing research objectives

How many research objectives is the right number? Time limits the number of questions that can be included in a focus group or an individual interview. If an interview is too long, respondents will become fatigued, rush through their responses and/or terminate early. In a focus group, time may run out before you have covered all topics. Unless you are going to pay an enormous incentive to get participants to answer a huge questionnaire, you need to limit your questions. In order to do that, you need to prioritize your objectives. Those that are less important may need to be omitted.

However, if you have a lot of important objectives - too many for one questionnaire - an option is to split your sample randomly and conduct two research projects, each with a different set of objectives and a shorter questionnaire. Assuming the split samples have the same characteristics, you should meet all your research objectives.

Exploring or measuring

Are you trying to explore a topic or

are you trying to measure something? The best approach is to explore first and then measure. You can miss a lot of information if you skip the exploratory stage. In many instances where exploratory research was skipped, the questionnaire for the measurement phase neglected to ask the most important questions. In addition, the multiple response choices did not include some of the most important answers.

As an example, a company had just installed an employee software platform and wanted to measure employee satisfaction with it. The IT managers were about to jump in and ask people how satisfied they were with different elements of the software and postpone asking any questions about training and support. Luckily the marketing research team was able to persuade the IT managers to conduct some exploratory in-depth interviews first.

Findings from these exploratory interviews showed that training and support were primary concerns. The quantitative research phase was then designed to measure satisfaction with those two elements and to uncover any suggestions for improvement. Eventually, the findings led to greatly improved levels of support and more tailored training methods for segments of the employee population.

Target population and recruiting

The recruiting of eligible and appropriate respondents should be based on the research objectives. Depending on the objectives, respondents may need to have prior knowledge or experience to enable them to voice an opinion. For example, if you want to find out details about customers' complaints, don't ask the CEO, ask the call-center staff. The CEO will know about the customers' complaints only when they reach high levels of magnitude.

In many cases, it is necessary to hypothesize the definition of the most appropriate audience, especially for the exploratory phase of the research. A company was considering offering an assistance plan that helps people find medical resources, legal resources, alternative transportation, hotels and even burial assistance or transportation

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of a deceased person. The product manager neglected to think about who would be the most likely type of person who would be interested in this service and did not specify requirements to the recruiter. It turned out that none of the participants recruited were travelers, visitors or newcomers; they had never left their hometown. They were totally bored with the ideas and couldn't see why they wouldn't just ask their family and friends for advice.

Another organization wanted research as input to its strategic plan, one element of which was to include how to win against its competitors. Unfortunately, the project manager neglected to specify that some of the participants in the research should either currently use or previously have used a competitor's brand - not just the client's brand. It turned out that the list source contained no one who used or had used a competitor's brand and therefore researchers were unable to obtain any data on opinions about competitors.

Methodology for comparisons

If you plan to compare current data to a previous year's data, you need to collect the data in a consistent manner. For example, if you have been using a telephone survey, you need to continue the telephone survey method. Many marketing researchers are switching to online methods. A switch in data collection method can be accomplished as a test, simultaneously with the original method. In that way, you will accomplish the objective of correct comparison, while at the same time testing the new method for future comparisons.

If you plan to make a comparison of current data with the previous year's data, you also need to use the same questionnaire as the previous year, although new questions can also be added.

Writing questions to meet research objectives

Questions should be written to meet the research objectives. I have seen questionnaires with questions

in them that did not seem to meet any of the research objectives, and conversely I have seen questionnaires where there were no questions at all for certain objectives. Either way, you have a problem. This mismatch is common, especially when a questionnaire is heavily edited by multiple people within an organization.

The easiest way to ensure you do not have a mismatch is to head each series of questions with the appropriate research objective. Don't remove the research objectives from the final questionnaire; they will assist the moderators or interviewers in focusing their questioning appropriately.

For example, if a key objective is to obtain competitor information, have a section titled "Competitor Information." Ask respondents which competitors they have heard of; which ones they use; what they think of them; how satisfied they are with them; and so on. Of course, if you have not properly recruited respondents who can answer these questions, you will not have data to meet that objective.

Lately, it seems that clients want longer questionnaires and shorter reports. By focusing on the research objectives, questionnaires and reports can be better aligned.

Choosing a moderator or interviewer

A moderator or interviewer needs to be matched to the type of data collection and type of respondent. For a relatively simple structured questionnaire administered by telephone, the requirements may be a good speaking voice, ability to read and some basic interviewing training. For specialized populations such as business or technical respondents, particularly in qualitative research, a moderator or interviewer who sounds knowledgeable about the subject matter will be able to obtain more information from the respondents by probing intelligently. The research findings will be richer as a result.

Analysis plan

The analysis plan should be based on the research objectives. For a quan-

titative study, tabulating everything by everything is a common procedure but unnecessary. Using the research objectives, you can think ahead about what kinds of tabulations and other analysis you will need. You should write the analysis plan prior to finalizing the questionnaire. You may find that you have neglected to ask a certain question that would provide useful data to analyze and you still have time to add it to the questionnaire.


Writing the report to meet objectives

The easiest way to write the report is to list the objectives and then take each one and write to that objective. Pretend you are writing a college exam with an open book. Write what you think you have found and then go back to check the data. I have seen reports with lots of data, but at the end you did not know if the research objectives were met because the objectives were not the focus of the report. A reader should not have to work too hard to obtain the necessary answers.

Whether your report is written in traditional style or presentation format, it is important to include the research objectives, description of the respondents and methodology. Keep in mind that some clients keep reports on file for a long time and eventually other people in the company may use them, so each report needs to be self-explanatory and self-contained.

A continuous cycle

If research objectives are defined correctly in the beginning and threaded through all elements of the research project, then at the end of the project, you will have useful findings that meet the research objectives. Market research is a continuous cycle; findings from each research project can be used to inform the research objectives for subsequent projects. | Q



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continued from p. 8

among younger consumers. In the U.S., 60 percent of 18–34-year-olds report talking to someone while texting, compared to just 24 percent of those ages 35+. “We started to see this trend a few years ago, when focus groups with panel members revealed they often surfed the Web or watched TV while taking surveys. Our latest research shows this trend is growing, posing both complications and opportunities for market researchers,” says Mark Hardy, SSI’s chief strategy officer and managing director, North America. “We now have more ways to reach people, but their focus is often splintered. Researchers will need to rethink how to succeed in this fragmented environment. For example, they may choose to add questions about people’s surroundings or other activities into surveys.”

Adding to the complexity is the fact that consumers worldwide also prefer to be on the move and may take surveys anywhere. In Japan, more consumers own laptops (73 percent) than desktops (54 percent). In the U.K. and Spain, laptops have caught up with desktops. Only in the U.S. and France do more people still own desktops. When focusing on those under 30, however, laptops are replacing desktops worldwide. In the U.S., 80 percent of 18–24-year-olds own laptops while just 67 percent own desktops. The gap is even larger in Japan, where 80 percent of younger consumers own laptops, compared to 52 percent who own desktops.

The rise in cell phone usage also underscores the trend toward mobility. In every country studied, more than 70 percent of participants own cell phones, and that number exceeds 80 percent in France, Spain and Japan. Even more telling, in all countries but France, more people own cell phones than landline phones, and that gap is particularly dramatic among 18–24-year-olds.

Social media is widely used in all countries. In the U.K., U.S., France and Spain, about half of study respondents used social media within the last week, with younger consumers the most avid users. Japan shows a different

profile, with less social networking and more blogging. Twenty-four percent of Japanese respondents have their own blogging space compared to just 4–7 percent in other countries.

Around the world, phone remains the primary way people stay in touch. Even among 18–24-year-olds, the phone is the top way people connect. Among younger consumers, however, texting and social networking make up a significantly larger portion of the communications mix than among older consumers. In Japan, texting actually has overtaken phone among 18–24-year-olds. For more information visit www.surveysampling.com.

With growing ubiquity, mobile consumer profiles morph

With the proliferation of mobile devices on the rise and recent reports of one in four houses going cell-only, there are many different ways and levels of intensity in which consumers can engage with the mobile universe. From can’t-live-without-it to can-barely-make-a-call-on-it, research from Stamford, Conn.-based InsightExpress found that mobile behavioral profiles are evolving and advancing.

The company’s Digital Consumer Portrait study identified a shift in three major mobile user profiles: Mobile Intensives, Mobile Casuals and Mobile Restrained, indicating that the mobile-adept crowd is growing and the mobile-novice crowd dwindling.

Mobile Intensives. This group represents 23 percent of the mobile universe, up from about 15 percent in early 2008. Members are characterized by smartphone ownership (68 percent) and a desire to utilize all capabilities offered by their mobile phone (mobile Internet, texting, videos, apps, etc.). The vast majority of Mobile Intensives (86 percent) fall within the sought-after 18–44-year-old age range, and just over half (54 percent) make over \$50,000 a year. Mobile phones play a key role in the lives of these consumers; in fact, 45 percent check their mobile phone either first or second thing in the morning (the bathroom is the phone’s main competition).

Mobile Intensives are more likely to have decision-making responsibility for key verticals such as travel, finance, health and other discretionary spending

areas. They also consider themselves to be influencers (i.e., other people come to them for advice) in categories such as travel (hotels, airlines, car rentals), investments, discretionary spending (restaurants, clothing, electronics, movies, cable/satellite) and prescriptions/personal care items.

Over half (53 percent) agree that they “look at advertisements,” while 44 percent agree that they “make a want list” of products advertised.

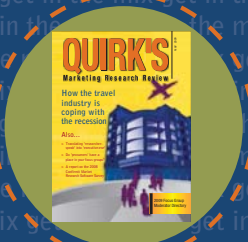
Mobile Casuals. Mobile Casuals represent 24 percent of the mobile universe (on par with early 2008) and are characterized by their use of mobile phones simply as a lifestyle-enhancing convenience. While smartphones seem to be an emerging interest for this group (15 percent own one), 85 percent own a feature phone. Mobile Casuals are more likely to be female (65 percent), fall into the 35–54-year-old age range (59 percent) and make under \$50,000 a year (also 59 percent).

Unlike Mobile Intensives, Mobile Casuals are not devoted to their devices. However, they are more likely than the Mobile Restrained group to use their phones for texting and photos. Almost three quarters (73 percent) text once a week, 43 percent take pictures once a week, and 21 percent send pictures once a week.

Mobile Casuals also appear to be almost as engaged in advertising as their Mobile Intensive peers. Forty-six percent agree that they “look at advertisements to see what I should purchase,” but only a third (35 percent) agree that they “make a want list” of products featured.

Mobile Restrained. Currently representing 53 percent of the mobile universe (down from 60 percent in 2008), Mobile Restrained individuals are the least-sophisticated mobile users. A whopping 96 percent own a feature phone instead of a more advanced smartphone. More than half (57 percent) are over 45 years old, and more than half (55 percent) make less than \$50,000 a year.

The Mobile Restrained group is also less active when it comes to texting and photos, with 47 percent texting once a week and 27 percent taking a mobile picture once a week. Like Mobile Casuals, 47 percent agree



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that they “look at advertisements to see what I should purchase,” but Mobile Restrained individuals are least likely (28 percent) to agree that they “make a want list” of products featured in advertisements. For more information visit www.insightexpress.com.

Women take no-muss, no-fuss approach to beauty products

Women want effortless beauty – beauty products, that is. When it comes to selecting cosmetics, consumers look for brands they trust and brands that make makeup – both buying it and applying it – natural and easy.

According to a study conducted by Market Force Information, a Louisville, Colo., research company, consumers favor Cover Girl over any other beauty brand. And while teens and young women may be recession-weary and making their last tube of lipstick stretch out through the summer, tween girl use of certain beauty products is on the rise, according to a study from Port Washington, N.Y., research company The NPD Group.

Seventy percent of the Market Force survey respondents said they wear cosmetics. As far as the products that are the most popular, a well-known name and mass-merchant sales have helped Cover Girl become consumers’ favorite cosmetics brand. Out of 60 cosmetic brands, Cover Girl was cited by 14 percent as their favorite, placing it on top. Clinique was second on the list with 10 percent of the mentions, and Maybelline (L’Oreal) and Mary Kay tied for third with 8 percent each.

When the consumers were asked what they loved most about their favorite makeup line, they chose brand trust over all of the other factors – the actual product attributes mattered much less. More than two-thirds said they love their makeup because they trust the brand, while only one-third cited loving it “because it feels wonderful.” Factors like “uses humane testing/is environmentally safe” were not weighted strongly and emerged toward the bottom of the list.

Cover Girl led the other brands in most of the attributes consumers care

about most, scoring highest in categories such as great value, brand trust, wears well throughout the day and easy, no-mess application. Clinique was named second in brand trust and rated highest of all the brands in the uses humane testing/is environmentally safe category. Although Mary Kay was the fourth favorite cosmetics brand, it still scored well for several attributes, including ranking third for brand trust.

A common sentiment that emerged in the survey is that makeup wearers want a natural and authentic look, rather than something ultra-modern. More than 40 percent selected the adjectives “natural” and “no fuss” to describe their favorite makeup line. Conversely, adjectives like “edgy” and “sassy” were at the bottom of the list.

When consumers were asked where they go to purchase their cosmetics, their answers showed there is no one clear retailer category of choice. The majority – 29 percent – said they purchase them from mass retailers like Walmart and Target, and another 21 percent buy from drug stores such as CVS or Walgreens. Slightly fewer, about one in five, shop for cosmetics in department stores. Sephora was a crowd favorite in the specialty retailer category. Out of the 12 percent who reported buying cosmetics from specialty retailers, more than one-third said they purchase from Sephora.

Among those still buying new products, tween girls (ages 8-12) have upped their product usage while teens (ages 13-17) and young women (ages 18-24) reported declines in their usage of beauty products. Tweens reported increases in regular usage of mascara (+8), eye liner (+6) and lipstick (+5), relative to 2007 levels. In fact, regular usage of mascara almost doubled in the past two years among tween girls (from 10 percent to 18 percent), as did eye liner (from 9 percent to 15 percent). Overall, tweens reported to use on average 4.5 different beauty products regularly, consistent with levels reported in 2007 (4.3).

Significantly more influential than TV and even their friends,

these girls say that they “look to their parents and siblings to see what they are using to help decide what to buy and use.” For more information visit www.marketforce.com or www.thenpdgroup.com.

Consumers find social networks untrustworthy but influential

Despite lingering trust and privacy issues, nearly half of all U.S. Internet users say online social networks are a good place to advertise, and 18 percent say they have purchased a product because of something they saw on a social network. Yet even though online social networking sites bring consumers closer to the most trusted parts of their lives, namely their family and friends, consumers place little trust in the networks themselves and don’t consider online social networks, forums and blogs to be as trustworthy as traditional media channels such as television, radio and newspapers, according to research from Vancouver, B.C., research company Vision Critical.

As social media marketers use increasingly sophisticated tactics to connect with their customers, the research reveals that consumers consider a brand message most trustworthy when it’s discussed or recommended by friends, family or contacts within a social network. Coupons or special offers are deemed the second most reliable method of brand and product placement, followed by product photos and videos, sponsorships and pages dedicated to a brand or product. Traditional banner ads are the least trusted among those tested.

Internet users are receptive to brand placement and advertising on social networks, and this exposure can lead directly to purchases, particularly among those under 35. Nearly half of U.S. respondents (48 percent) say that online social networks are good places for brands and products to advertise to consumers, while 39 percent of U.K. and 43 percent of Canadian participants agree. More than one-quarter of U.S. Internet users aged 18-34 (28 percent) say they’ve purchased a product because of something they have seen on a social network. For more information visit www.visioncritical.com.

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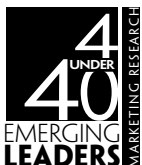
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Product and Service Update

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ideas, including non-product items, such as coupons, signage and limited-time offers.

IdeaScreenPlus is available as a self-service, supported or full-service research product. It can be used with a client's community panel, for direct feedback from business customers or incorporated with Vision Critical's global panels. For more information visit www.visioncritical.com.

Kinesis rolls out two platform updates

Kinesis Survey Technologies LLC, Austin, Texas, has released an updated e-mail delivery system for its market research product suite. The new platform offers improved e-mail deliverability rates for Kinesis clients. It aims to increase deliverability through advanced configuration/control features, including IP address pools and domain key signatures, and enable real-time delivery tracking, better response rates and enhanced reputation monitoring for market research panels.

The platform is available for panels of all sizes and is particularly well-suited for large-scale panels with differing mail classes that need to be managed separately. The e-mail delivery system will be offered for the Kinesis Survey and Kinesis Panel products.

Additionally, Kinesis has added a card-sort question type to the market research edition of its Kinesis Survey product. The feature enables point-and-click programming of sorting exercises and supports both sortable text and media categories. It offers a flexible number of categories, the ability to randomize/rotate/anchor categories and/or choices and the ability to display options in a list or a stack. The feature also offers crosstabulation support and customized reporting capabilities, including real-time hierarchical cluster analysis, a multidimensional scaling map and output compatible with third-party card-sort analysis software. For more information visit www.kinesisurvey.com.

YouthBeat moves from syndication to youth insights service

C&R Research, Chicago, has augmented and repositioned its YouthBeat lifestyle report as a subscription service. The new YouthBeat will continue to be supported by quantitative and qualitative data, interviewing 10,000 kids, tweens, teens and 3,000 of their parents on a monthly basis via an online quantitative survey. YouthBeat's virtual panel of families aims to allow researchers to hear and see today's youth and their parents through Webcam interviews. Subscribers will have access to the raw data through a data portal and receive data analysis in the form of topical analysis, seasonal updates and an annual yearbook that offers a macro view of youth culture. For more information visit www.youthbeat.com or www.crrresearch.com.

Briefly

London research company Cognicient has launched Link BI, a business-intelligence-for-surveys initiative that aims to allow companies to view the insights gleaned from their research in one interface. Link BI is a complementary service to Cognicient's Link Manager software and is intended to help companies with the distribution of collective insights brought together using Link. For more information visit www.cognicient.com.

Rochester, N.Y., research company Harris Interactive has launched MediaAmp, a tool designed to augment traditional media-buying and -selling with brand equity and program engagement. MediaAmp aims to connect two externally-validated metrics - brand equity and emotional connection - within a single platform, providing insight into the relationship between what viewers watch and the brands they love. MediaAmp links data from two of Harris Interactive's syndicated studies: EquiTrend and Multi-Screen Engagement. For more information visit www.harrisinteractive.com.

Stockholm, Sweden, research

company Cint has reached more than 500,000 double opted-in panelists in the Nordic countries through the Cint Panel Exchange. For more information visit www.cint.com.

Netpop Research, San Francisco, has introduced its Qidget platform. Qidgets are interactive ads designed to support collaborative learning and dialogue across the Web. With Qidgets, Netpop Research can host simple engagements in the form of polls that address market research and advertising needs. For more information visit www.netpop.com.

OnePoint Surveys, a New York research company, has expanded its mobile research platform to include the collection of video and picture messages. The expansion is intended to allow participants to respond via text, wireless access protocol, mobile Web message or a picture or video message. OnePoint's picture and video collection does not depend on the type of mobile phone being used; the only requirement is that it has a camera. For more information visit www.onepointsurveys.com.

Focus Pointe Global, a Philadelphia research company, has partnered with iGuard.org., a Princeton, N.J., online medication safety program, to launch the FPG Patient Panel. The panel is designed to serve as a single point of contact health care marketing research companies can use to access over two million health care-related consumers for chronic condition and medication-specific related research. The partnership will also supply access to quantitative study programming and hosting support as well as qualitative study services, which include facility rental and project management. For more information visit www.focuspointeglobal.com.

Research firms Peanut Labs, San Francisco, and Conversion Strategies, Toronto, have partnered to offer SocialVoice, a social media research product that aims to scientifically measure opinions registered in

social media and transform unstructured social media conversations into data that mirrors traditional survey research data. For more information visit www.peanutlabs.com or www.conversion.com.

SIS International Research, New York, has launched its data services in China, including two different sets of transaction data. One data set contains selling data and the target companies' names, and the other is purchasing data that contains the target companies' supplier names and transaction data. The service is designed to allow clients to request industry segments and individual specific target companies in China. For more information visit www.sismarketresearch.com.

EPM Communications Inc., a New York research information company, has released the 2010 edition of the Research Alert Yearbook, a one-volume source that compiles findings from 600+ research reports and studies. Copies can be ordered at www.epmcom.com/rayb.

Chicago research company Synovate has launched Media Atlas China, a syndicated media study of 68,000 consumers ages 15-64 across 66 cities and rural areas in mainland China. For more information visit www.synovate.com/whatwedo/media/media-atlas.jsp.

Bellomy Research Inc., Winston-Salem, N.C., has released its SmartIDEAS Community app, which is intended to give verified members of its private market research online communities access to the communities to browse and respond to the most recent forum topics. SmartIDEAS is available for free at the iPhone App Store. For more information visit www.bellomyresearch.com.

Surrey, U.K., research company EasyInsites has included its GMTV ViewBack panel in the Cint Panel Exchange. The panel is comprised of 12,000+ GMTV viewers who have been profiled for their TV viewing habits. For more information visit www.easyinsites.com.

Ipsos ASI, a New York research company, has launched its Big Idea research solution, designed to help identify winning advertising and communications ideas to establish and build stronger brands. Using both quantitative and qualitative research techniques, this methodology is intended to be evaluative as well as diagnostic to pinpoint ideas that can be further refined into the brand's central message. For more information visit www.ipsos.com/asi.

London research company Verve has launched Verve Project, a solution for clients looking to try online customer advisory panels and communities. The solution is intended to allow creation of short-term, closed, branded panels or communities with their customers, as well as open up the conversation less formally for feedback through forums and other social networking activities. For more information visit www.haveverve.com.

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Research Industry News

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aircraft maintenance logs kept by pilots to detect problems. Log content will be read and parsed for meaning using Clarabridge's text analytics software and then loaded into a Teradata Data Warehouse Appliance for further analysis for early indications of possible problems with certain airline equipment. The paid test is being conducted for B/E Aerospace and began in January 2010. It is expected to conclude by fall 2010.

Association/organization news

ESOMAR, Amsterdam, the Netherlands, has issued a new guideline on research via mobile phone with the aim of promoting professional standards, best practices and respectful relationships with the individuals being called. The guideline addresses a range of issues including unsolicited calls to mobile phones, hours of calling, respondent safety and confidentiality as well as compensation for costs that might be incurred by the person being called.

The American Association for Public Opinion Research, Deerfield, Ill., has updated its Code of Professional Ethics and Practices. The enhancements include an expanded focus on transparency and disclosure; improved consistency with other codes of professional conduct; new guidelines incorporating the practice of online panel research and other newer modes of data collection; and greater emphasis on researchers' professional responsibility toward survey respondents.

Awards/rankings

The Advertising Research Foundation, New York, has announced the winners of its David Ogilvy Awards, which recognize the role of consumer research in creating successful advertising. **The United States Postal Service**, Washington, D.C., received the Grand Ogilvy Award; **General**

Motors, Detroit, received the Research Achievement Award; and **Bank of America**, Charlotte, N.C., received the Research Innovation Award. A full list of winners can be found at www.thearf.org/assets/ogilvy-10-winners.

The Australian Market and Social Research Society has announced the winners of its Research Effectiveness Awards: **Open Mind Research Group**, Award for Social Impact; **Quantum Market Research**, Award for Communications Strategy Effectiveness; and **Forethought Research**, Award for Commercial Effectiveness.

The American Marketing Association, New York, has named **Kristin Luck**, president of Fresno, Calif., research company Decipher Inc., a recipient of the 2010 Marketing Research Emerging Leader Award.

Colleen Moore-Mezler of Moore Research Services, Erie, Pa., was awarded the Woman-Owned Business of 2010 Award from the Pittsburgh division of the **Small Business Association**, Washington, D.C.

Orem, Utah, research company **Western Wats'** U.S. panel, Opinion Outpost, was awarded the Silver Certification for consistency and recognized as the most consistent panel tested in the U.S. by East Islip, N.Y., research company **Mktg Inc.** Mktg Inc.'s Sample Source Auditors performed an independent evaluation over a nine-month period.

New accounts/projects

The Marketing Workshop Inc., a Norcross, Ga., research company, has selected Atlanta analytics company **Sentiment360's** social media listening service to provide marketing intelligence and insight to its clients.

The Hispanic Information and Telecommunications Network Inc., Brooklyn, N.Y.,

has selected Portland, Ore., research company **Reentrak Corporation's** TV Essentials set-top box service to better gauge the viewing preferences of its audience.

San Francisco research company **Peanut Labs** has been chosen by **Nexon America**, a Los Angeles online gaming company, to conduct surveys of online teens. During a three-month period, respondents will be recruited into Peanut Labs' social media sample group through Nexon's library of online games. Participants will receive credits that can be redeemed within the in-game NX shops in Nexon's game titles.

Images to Data, a Doylestown, Pa., data collection company, has been selected by **Laying the Foundation Inc.** (LTF), a Dallas education-focused non-profit organization, to provide project management, printing, fulfillment, scanning and verification services relating to LTF's year-end assessment project.

New York researcher **The Nielsen Company** has signed a multi-year agreement with **Gannett Company Inc.**, a McLean, Va., media company, to use Nielsen's local television ratings services in all of Gannett's local markets.

Fox Broadcasting Company, Los Angeles, has extended its two-year partnership with **Innerscope Research Inc.**, Boston, through which Fox will provide advertising clients with biometric engagement measures for on-air and cross-platform promotions.

Rolling Meadows, Ill., professional services firm **Valtera Corporation** has selected Reston, Va., research company **Clarabridge's** text mining and sentiment analysis platform for its employee surveys.

BrainJuicer Group PLC, a London research company, has been named the preferred sup-

plier for product concept testing at **Ocean Spray Cranberries Inc.**, Lakeville-Middleboro, Mass.

Philadelphia management consulting firm **Hay Group** has chosen Cologne, Germany, research company **Globalpark**'s platform for feedback management to track employee sentiment and behavior.

New companies/new divisions/relocations/expansions

Gongos Research, Auburn Hills, Mich., has formed its financial and diversified team. The team of eight will be led by Katherine Ephlin.

Stockholm, Sweden, research company **Cint** has opened its first Dutch office and hired Arjen van Duijvenbode as managing director to lead the Cint Netherlands branch.

New York researcher **The Nielsen Company** has launched an international global research and development center in China. The operation will focus on digital media measurements and has signed with the **Beijing Institute of Technology** to begin research on online video tracking called Video Watermarking.

Former directors of Horsham, Pa., research company TNS Grant Beuzeval and Nicole Hessing have launched **Radar Global**, a Hong Kong research agency. The firm is online at www.radar-global.com.

Millward Brown, a Naperville, Ill., research company, has opened a West African hub office in Accra, Ghana. The business will be a joint venture with **Scangroup Limited**, a Nairobi, Kenya, marketing services firm.

IMS Research, Wellington, U.K., has expanded its direct operations to Seoul, South Korea. The company hired Seoknam (Nam) Kim and Paul Erickson to lead the practice.

Chicago research company

Synovate has created a Digital Center of Excellence in London.

London research company **BrainJuicer Group PLC** has opened an office in São Paulo, Brazil. The Brazil office will be headed by Gabriel Aleixo.

Tokyo research company **AIP Corporation** has opened a London office. The AIP London office is located at 1 Lyric Square, London, W6 0NB, U.K., and can be reached at +44-20-3178-5589.

Vision Critical, a Vancouver, B.C., research company, has relocated its Paris headquarters to 61 rue de Monceau, 75008. Additionally, the company's France headquarters has debuted a French version of the company Web site at www.visioncritical.fr.

Research company earnings/financial news

The Nielsen Company, New York, has begun interviewing bankers to underwrite an initial public offering to be traded as a public company, according to an April 26, 2010, report in the *Financial Times*.

Additionally, The Nielsen Company announced financial results for the quarter ended March 31, 2010. Reported revenues were \$1,196 million, an increase of 9 percent over reported revenues for the same quarter in 2009. Reported operating income was \$132 million, compared to operating income of \$112 million for prior-year quarter.

Synovate, Chicago, reported financial results for 2009. The company's gross revenue increased by 0.6 percent to £521.3 million. Net revenue was down 2.2 percent to £321.8 million. Total operating costs were 0.7 percent better than 2008 at £284.9 million. Operating profit was £36.9 million, down 12.6 percent from £42.2m in 2008.

The GfK Group, Nuremberg, Germany, has invested in **SirValUse Consulting**, Munich,

Germany, to expand its digital strategy. GfK will own a 40 percent share in the company.

Separately, GfK reported 2010 first-quarter financial results. GfK generated sales of 280.9 million euros. Overall, sales were up 6.1 percent. Acquisitions increased sales by 0.5 percent and currency fluctuations impacted positively with 0.4 percent. Adjusted operating income rose to 25.3 million euros and was up 71.2 percent for the prior-year quarter. Operating income more than tripled from 5.4 million euros in the prior-year period to 18.4 million euros.

Harris Interactive, Rochester, N.Y., announced financial results for the third quarter of fiscal year 2010. Total revenue was \$41.2 million, compared with \$39.9 million for the prior-year period. Operating loss was (\$0.9) million, compared with an operating loss of (\$7.3) million for the same period in 2009. Net loss was (\$1.6) million, compared with a net loss of (\$6.7) million in third-quarter 2009.

ComScore Inc., Reston, Va., announced financial results for the first quarter of fiscal year 2010. Revenue was \$36.1 million, an increase of 18 percent over the first-quarter 2009.

Ipsos, Paris, reported results for first-quarter 2010. Revenues rose 14.3 percent over first-quarter 2009 to 236.9 million euros.

BrainJuicer Group PLC, London, has begun establishing a long-term incentive plan (LTIP) to provide an equity-based incentive scheme to its employees and management. The LTIP will need to hold, through an employee benefit trust, a certain number of ordinary shares to satisfy the future potential awards under the plan. Accordingly, the company is looking to buy back 650,000 ordinary shares, or approximately 5 percent of the company's current issued share capital.

Names of Note

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Marketing Management Analytics, a Wilton, Conn., research company, has named **Mitch Weintraub** vice president, account management, and **Matthew Abrena** associate director, client services analytics.

Surrey, U.K., research company *Added Value* has made three appointments to its North American team in Los Angeles: **Steve Diller**, senior vice president, brand development and innovation; **Steve Rowe**, vice president, brand development and innovation; and **Aliza Pollack**, vice president, qualitative.

Framingham, Mass., research company *Kadence International* has named **Kate Rose Colantuono** project manager. She will be based in Boston. The company has also hired **Kevin Braun** as research center supervisor.

InsightExpress, a Stamford, Conn., research company, has made several appointments to its custom marketing research team. The company named **Meghan DeBerry** senior account executive and **Jesse Epstein** account executive and promoted **Keith Busch**, **Kevin**

Evers and **Kristen Stonacek** to account executives.

Kadee Fabyan-Dew has joined *G & S Research*, Indianapolis, as senior project manager and moderator. Additionally, **Justin Miller** has been promoted to programming supervisor.

Paul Richard “Dick” McCullough has joined *AlphaDetail Inc.*, a San Mateo, Calif., research company, as director, research methodology and analytics.

San Francisco, Calif., research company *Solarbuzz* has hired **Finlay Colville** as senior analyst.

Timothy J. Tardiff has been named principal at *Advanced Analytical Consulting Group*, a Boston research company.

Michael Lowenstein has been hired as executive vice president of *Milkwaukee* research company *Market Probe Inc.*

San Francisco research company *MarketTools Inc.* has named **David Rusher** senior vice president, enterprise feedback management sales. The company has also appointed **Jaynie Studenmund** to its board of directors.

Clear Channel Radio, San Antonio, has hired **Bob Michaels** as executive vice president, research.

Bill Hoffman has joined *Best Buy Co. Inc.*, Richfield, Minn., as senior vice president, consumer insights.

Horsham, Pa., research company *TNS* has appointed **Ian Stewart** as regional director, youth, Asia-Pacific, Middle East and Africa Region.

Kate Taplin has been named director, research, of Palo Alto, Calif., research company *AnswerLab*.

Reston, Va., research company *com-Score Inc.* has made several additions to its Asia-Pacific operation: **Victor Cheng**, sales director, Hong Kong; **Samantha Oh**, account manager, Southeast Asia; **Kedar Gavane**, sales, India; and **Kara Anglin**, sales, Australia.

Katy Leng has been promoted to senior research executive of *Ci Research*, Cheshire, U.K.

The Pert Group, a Bloomfield, Conn., research consultancy, has made several appointments: **Barb Murphy**, senior vice president, market planning and development; **Donna Patton**, group director; **Teresa Fryer**, senior insights manager; **Alex Camacho**, consultant; **Christopher Biviano**, lead generation specialist; **Christine Connolly**, lead graphic specialist; and **Lisa Fiducia**, senior design specialist. The company has also made 10 promotions: **Doug Guion** to senior vice president, client service administration and operations; **Regan Mik**, senior account director; **Heather Mitchell**, qualitative director; **Sandy Rubino**, senior account manager; **Megan Johnston**, senior account director; **Kyle Letendre**, insights manager; **Mike Marcoux**, insights manager; **Ola Ingram-Ford**, research associate; **Cathy Frank**, senior data processing specialist; **Sheila Minnifield**, field director; and **Jackie Spagnoletti**, senior field specialist.

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calendar of events

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.shopperinsightseven.com.

The 2010 Ethnographic Praxis in Industry Conference will be held on **August 29-September 1** at the Midtown Conference Center in Tokyo. For more information visit www.epic2010.com.

The Australian Market and Social Research Society will hold its annual national conference, themed “Eyes Wide Open,” on **September 9-10** at the Melbourne Convention and Exhibition Center in Melbourne, Australia. For more information visit www.mrsa.com.au.

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.

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.

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 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.

ESOMAR will hold its annual online research conference, themed “E-Universe: The Power of Listening,” on **October 17-19** in Berlin, Germany. For more information visit www.esomar.org.

ESOMAR will hold WM3, a conference on worldwide multimedia measurement, on **October 19-21** in Berlin, Germany. For more information visit www.esomar.org.

The Life Insurance and Market Research Association will hold its annual meeting on **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.pmr.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 ARF will hold its 2010 ARF Industry Leader Forum, themed “Discovering Consumer Insights,” on **October 28** at the New York Athletic Club. For more information

visit www.thearf.org.

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 TMRE10QUIRK when registering to save 20 percent off standard rates. For more information visit www.iirusa.com.

The Marketing Research Association will hold its annual fall education conference on **November 10-12** at Walt Disney World in Orlando, Fla. For more information visit www.mra-net.org.

ESOMAR will hold its 2010 conference on innovation on **November 14-16** in Barcelona, Spain. For more information visit www.esomar.org.

The Society of Insurance Research will hold its annual conference and exhibit fair on **November 14-17** in Jacksonville, Fla. For more information visit www.sirnet.org.

ESOMAR will hold its qualitative research conference, themed “Foresight on Moods and Thoughts,” on **November 16-18** in Barcelona, Spain. For more information visit www.esomar.org.

The Japan Marketing Research Association will hold its annual APRC conference on **November 25-26** at the Westin Tokyo. For more information visit www.jmra-net.or.jp/pdf/conference2010.pdf.

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.

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Portrait of a researcher

As part of the process of writing up the results to our second annual salary survey of client-side researchers, I had the distinct pleasure of plowing through pages and pages of verbatims generated by the two open-ended questions we included this year.

The questions (What do you like most about working in marketing research? What do you like least about working in marketing research?) were meant to add a little color to the data and hopefully give us insight into the current state of mind of our respondents.

A little color? How about Jackson Pollock-like levels, with just about the same amount of chaos to the emotions being expressed!

We have included some of the comments in the main article on the survey results (see page 28) and have posted a full selection in the article archive at quirks.com. But I wanted to devote my column to exploring some of the best comments and in the process do a rough sketch of the Mind of the Client-Side Researcher.

On a side note, I now have a much greater appreciation for the joys and trials that accompany the coding and cleaning of respondent-generated

comments. The tidying-up and making-sense-of consumed the better part of two days when all was said and done. And while there was a fair amount of tedium, those spells of eye-glazing drudgery were broken up by bursts of laughter.

Research humor

First of all, you people are funny. Check out the research humor in these two responses. First, one reader's "like most" reply:

"1) Exercising creativity. 2) Developing 'stratergy' (aka strategy if you're coding this). 3) Influencing decision makers. But best of all DISCOVERY, finding out something new that no one else has thought of or even considered."

And another's "dislike most" reply:

"Questionnaire construction, coding open-ended questions (LIKE YOU ARE DOING RIGHT NOW! HA HA!) and tight deadlines with demanding clients who usually don't have a CLUE about MR! ;)"

And you're passionate as well, judging by the following answers to the "like most" question. Many respondents seemed to view research as more than just a job. For a few, it borders on a calling.

"The same thing that drew me to

marketing research nearly 20 years ago . . . pulling together seemingly disparate pieces of data and information to draw a cohesive view of what's occurring in the landscape to assist and direct strategic decision-making."

"Marketing research offers a constant challenge to keep moving, keep thinking and staying ahead of the game. Total engagement with the world around you makes this job field less of a career choice and more of a way of living."

"It satisfies my research nature - research is in my bones. I love having an impact on my organization and the satisfaction of our consumers!"

Solving mysteries

A sense of fulfillment from the process of research and the sleuthing it requires came through in many of the responses.

"I love the aspect of solving mysteries . . . answering questions my company needs to make informed decisions."

"It's like detective work."

"I love being able to answer my own questions."

"I love analyzing the findings of a survey. I primarily work in quant and seeing the results and digging in - finally getting the answers to my questions - is always so fulfilling."

Self-fulfillment is one thing, but

researchers also seem to enjoy meeting the needs of others, using research to answer questions for their internal clients while helping to make consumers' lives better.

"Identifying consumer needs and then working to develop products that address those needs. It's a chance to make someone's life a bit more fun."

"Representing the consumer, connecting research methodologies to practical business applications, supporting and informing business decisions, seeing direct business success coming out of consumer insights."

Another plus of working in research, according to our respondents, is that no two days are ever alike.

"Your day can change at the drop of a hat. Walk into the office at 7:30 in the morning thinking about what you have to do that day and realize by 9 a.m. that the plans have changed."

"There is always some new or different challenge to deal with, and that keeps me entertained. I'd get bored if I had to do the same thing over and over again."

"The continuous variety. One day it's focus groups, the next I am writing a survey, the next I am presenting to internal clients, the next day I am running a statistical analysis."

Lack of respect

But of course, all is not perfect in the lives of our readers. Along with the annoyances that come with any job (bosses, co-workers, feeling overworked/underpaid), researchers seem to experience a fairly unique lack of appreciation for the work they do.

"Marketing research doesn't get the respect it deserves in the business world as a bona fide profession."

"Working with people who don't understand that what I do is not equivalent to Survey Monkey."

"That folks don't truly understand the expertise we (those who are trained and experienced in the field) bring to the table. Management loves to see results that support their ideas . . . so it's always fun to have to 'pretty up' a report for them, regardless of the unethical nature of that action."

"Being told that if my project, done properly, doesn't agree with a sponsor's preconceived assumptions, that I have done the research wrong or made an error. I don't make errors!"

"Clients who think they know how to do my job and tell me that I am wrong and thus do not listen to what the data say and then blame Insights when the project or initiative fails."

"With every new team/marketer/boss that I work with, I have to re-prove my experience and expertise to build credibility. This doesn't seem to move along with you."

"Research is considered a cost function instead of a strategic function."

Spot in hell

Upper management is often at fault, but some of the respondents seem to have a particular spot in hell reserved for their counterparts in the sales department.

"Getting treated like sh_t by sales people because they don't get it and think I'm evaluating them for mgmt."

"At times, I've felt like a second-class citizen, especially when compared with sales."

"Trying to explain math to 'sales' people."

They expressed the other lows of working in research as fervently as they did the highs, with a mixture of bitter-

ness, resignation and occasional self-loathing.

"Nonresearchers who like to play researcher."

"I would have to say putting a lot of time and effort into a presentation that may or may not end up getting used, and if it does, someone else will be taking the credit."

"There are times when I just don't want to look at numbers anymore."

"It is tough to not have all the answers; it is tough when management wants to kill the messenger."

"I have to work with a lot of geeks. People who have little to no communication skills. It's kind of embarrassing when we look at our peer group."

"I don't think the profession thinks very highly of itself. There has always been an undercurrent of 'We're lucky to be here' versus 'We are a vital part of the organization.'"

"People's perceptions about what the function is - a bunch of nerds that live in a bubble."

"Business colleagues tend to take 'bad news' from data personally, and often discount it."

"That people order it up like french fries if you don't prevent it from happening."

A thick skin

It's hard to find one quote to sum up the overall tone of the verbatims. Being a glass-half-full kind of guy, I of course would lean toward something that accentuates the positive. It's clear that being a researcher requires a thick skin, a short memory, the ability to adapt on the fly and an acceptance of the role of underdog - at least in the organizations where the function is not held in the highest esteem.

But in those firms where gathering insights is seen as a worthwhile undertaking, where understanding the consumer and creating products and services that meet their needs is part of the corporate fabric, the researcher's job satisfaction can reach new heights on a daily basis.

"The opportunity to have a significant impact on an organization's strategy, product development and brand. As a market researcher, you are in a unique position to solve business challenges for an organization by bringing the voice of the customer into the problem-solving and decision-making process. Your data and analysis can have a significant impact on organization-wide initiatives, and that's an exciting process to be part of." | Q

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cover-to-cover

Facts, figures and insights from this month's issue



The threshold for poor customer service experiences is low, in many cases prompting a customer to label a cable operator as a poor customer service provider after only one negative experience. Respondents stated that it takes only two occurrences of bad customer service before they become likely to change their opinion of the service provider to one that has poor customer service. (page 8)



The FCC's proposed rule should serve as a clarion call to the research profession to demand a change in the Telephone Consumer Protection Act - not a tightening of consent standards but a full exclusion of bona fide survey and opinion research calls from the restrictions on autodialer calls to cell phones. (page 20)



We measured the consistency of the responses to questions that were repeated in separate sections of the survey, and we found that recall discrepancies increased as the SurveyScore dropped - proof that more complicated surveys lead to inconsistent and unreliable responses and lower data quality. (page 40)



Online communities have clearly not yet taken off in a way you might anticipate from the buzz that they are creating at conferences and in the research press, with only one in six (17 percent) operating any online communities. (page 55)

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