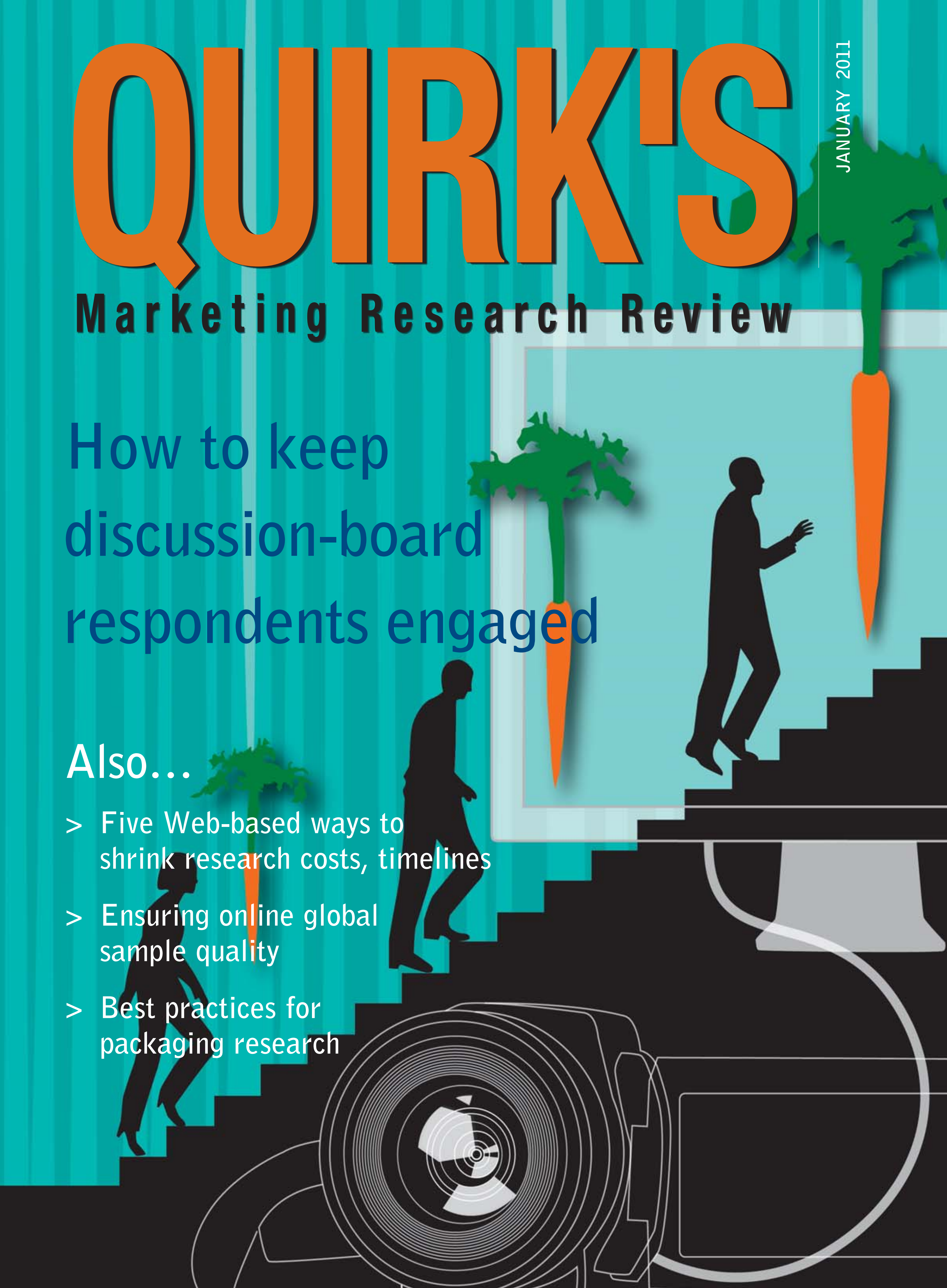
QUIRK'S

Marketing Research Review

JANUARY 2011



How to keep discussion-board respondents engaged

Also...

- > Five Web-based ways to shrink research costs, timelines
- > Ensuring online global sample quality
- > Best practices for packaging research

Quirk's Marketing Research Review
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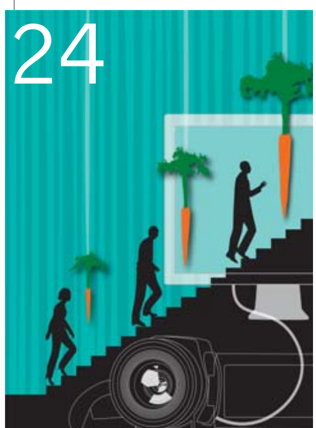

Illustration by Jennifer Coppersmith

Publisher
Steve Quirk

Editor
Joseph Rydholm

Content Editor
Emily Goon

Production Manager
James Quirk

Directory Manager
Alice Davies

Advertising Sales
Evan Tweed, V.P. Sales
651-379-6200
evan@quirks.com

Lance Streff
651-379-6200
lance@quirks.com

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in case you missed it...

news and notes on marketing and research

How psychographic profiling is helping target TV advertising

The TV shows you watch can offer marketers insights into your personality. Very modest people are more likely to watch the blue-collar hero show *Deadliest Catch* while altruistic people tend to prefer cooking shows like *Rachael Ray* and reality shows with happy endings like *The Bachelor*, according to Beth Snyder Bulik's November 1, 2010, article, "Research Links Personality Traits to Consumers' Viewing Habits, Helps Marketers Match Brands With Audiences," in *Ad Age*.

To find out which personalities are attracted to which TV shows, New York psychographic ad targeter Mindset Media surveyed 25,000 TV viewers across 70+ TV shows. The study found common personality traits among many shows' regular audiences.

Mad Men. Creative people are 41 percent more likely to watch *Mad Men* than less creative people. Advertisers with strong appeal for them include Apple and Audi A6. Liberals are a whopping 124 percent more likely to watch the ad drama than other people. These people prefer brands such as Blue Moon and American Express.

Family Guy. *Family Guy* draws an audience of rule breakers or rebels who are 61 percent more likely to watch the show. Brands that would appeal to rule breakers are DiGiorno and Ford F150. Risk takers are 50 percent more likely to watch *Family Guy*. Advertisers that would appeal to risk takers are Totino's and Harley-Davidson.

Glee. Gleeks tend to be very open. So-called experientialists are 24 percent more likely to watch. Brands that connect with them include Evian and Volkswagen Jetta. Creative people are 17 percent more likely to watch *Glee* than less-creative people.

Dancing with the Stars. Traditionalists are 21 percent more likely to watch *DWTS*. Advertisers who would appeal to these solid citizens include Kraft and Chrysler Town & Country. *DWTS* fans also tend to be compliant. The get-alongs, as Mindset refers to them, are 16 percent more likely to watch the show. Brands that connect with them include Fiber One and Buick Regal.

The Office. Those who think they are superior to others are 47 percent more likely to watch this show. Brands that would be a good fit for the show include Starbucks and BMW Series 3. Experientialists are also more likely (44 percent) to watch *The Office*.

The Biggest Loser. People with personalities that fall low on the creativity scale tend to watch this show. Realists are 20 percent more likely to watch. Advertisers that would be a good buy include Bud Light and Cadillac CTS.

What does Walmart's sales decline say about the consumer landscape?

With all the talk over the past few years of dwindling discretionary income and increased importance of value and - more specifically - saving the hard-earned dollar, Walmart's sales struggles have come as somewhat of a shock to the retail industry. Logically, the trade-down phenomenon should have benefitted a big-box discount retailer like Walmart, but as the economy began rebounding, Walmart's same-store sales in the U.S. declined 1.3 percent in the third quarter of 2010, making it the sixth-straight quarter U.S. sales have taken a dip.

Questions persist as to whether shoppers have returned to more upscale retailers or if other retailers have narrowed the price gap to make their service worth the slight price premium. Maybe Walmart's core shopper has less to spend or perhaps Walmart has simply failed to capture its share as the retail sector grows.

Scottsdale, Ariz., research company Blueocean Market Intelligence conducted a study, Walmart Customers Rolling Back, to explain why Walmart's sales haven't rebounded like its peers. The study indicated that many Walmart shoppers are spending less overall, but a decline in Walmart shopping trips appears to be driven by customer loss rather than reduced shopping frequency among current customers. Among those leaving Walmart, more than half don't view Walmart as the low-price leader, and many who have reduced their Walmart spending report they are finding competitors more affordable and convenient. Project Impact, Walmart's remodeling effort designed to attract higher-income shoppers and reduce clutter, has damaged customers' attitudes about the store's variety and brand selection.

Additionally, the study showed that Walmart isn't well-positioned for economic recovery. Price alone may not lure shoppers from competitors, as most believe Walmart lags on service, variety and quality. While the recession has forced other stores - discount and non-discount alike - to compete with big-box Goliaths like Walmart on price, it seems that Walmart has failed to raise its value via an improved shopping experience. No-frills, low-cost messaging may have lost its place in the level playing field of lowered prices and increased service. If recovery is on the horizon as economists claim, the true test for Walmart will come when, if ever, competing retailers again raise prices. Consumers currently getting more for less thanks to recession-driven deep discounting could find themselves growing accustomed to a more posh shopping experience and continue to pay more for more instead of returning to Walmart's warehouse-style stores.

2011 trends get back to American tradition with a keen eye to a global future

From sensory touchpoints and the desire for emotional experiences to wanting to reconnect with American patriotism and silent-screen movie-star glamour, consumer trends for 2011 incorporate getting back to the basics and also thinking futuristically about sustainability and natural products.

If marketers can appeal to consumers' passions and sensibilities - their nostalgia and their commitment to the future - success in an ever-so-slowly recovering economy could be within reach, according to data from Arylessence, Marietta, Ga., fragrance and flavor company.

Arylessence's TrendWatch study identified several trends that reflect how consumers make choices today and predict how marketers will respond in 2011 and beyond:

Emotive Edge: Ideas that connect with sensory touchpoints, transform consumers emotionally and deliver memorable, sensuous experiences.

American Stories: A passion for American values, patriotic themes and locally-sourced/-produced foods, beverages, clothing and accessories.

South America: Reflecting the creative vitality and rich resources of countries like Brazil, plus the diversity of natural, exotic and nurturing ingredients from the Amazon rainforest and other regions.

Style Rewind: Renewed interest by fashion designers and consumers in everything vintage, classic and timeless, evoked by Hollywood glamour, old-world aristocracy, pre-war luxury, the Beat generation and 1960s hippie culture.

Eco Evolution: Reflecting a change in how global corporations, small entrepreneurs and consumers think about the world, sharing a commitment to sustainability, protecting the planet, reducing waste and using resources responsibly.

Modern Menu: How people relate to food and American attitudes to food are changing, and U.S. food marketers and retailers innovate to keep pace with culinary desires.

Other trends include Bang for Your Buck, redefining what value means; The Power of Nature, regarding nature's ability to care, nurture, nourish and protect; and Cause an Effect, where the proceeds from consumer purchases benefit others and help make the world a better place.

Car buyers consider the total sales-and-service package when deciding to buy

The way customers are treated by the dealership is more important to overall new-vehicle buyer satisfaction than the actual transaction price, according to the 2010 U.S. Sales Satisfaction Index Study from J.D. Power and Associates, a Westlake Village, Calif., research company. For the study, overall customer satisfaction was measured across four factors: working out the deal; salesperson; delivery process; and dealership facility.

Over one-half of new-vehicle buyers cite dealer treatment as a reason to purchase their new vehicle from a specific dealer. In comparison, 38 percent of buyers cite vehicle price or the deal offered as the reason for selecting their dealer. Furthermore, once the dealer is selected, the ease of coming to an agreement on the final vehicle price has the single-greatest influence on buyer satisfaction, surpassing the importance of fairness of the actual price paid. With the exception of selecting a vehicle, negotiating the deal is the aspect of the new-vehicle buying process that takes the longest time (53 minutes, on average).

The study also finds that 60 percent of new-vehicle buyers visit more than one dealership during the shopping process. While many dealers are rejected for not having a vehicle that the buyers wanted to purchase, a significant number of buyers (18 percent) end showroom visits primarily due to poor customer treatment by the dealer's salespeople. While some new-vehicle buyers complain about dealer sales staff applying too much sales pressure, an equal proportion complain about receiving insufficient attention from salespeople. Other frequently-mentioned complaints include dealer staff being discourteous or not being straightforward with the buyer.

For a third consecutive year, Jaguar ranked highest among luxury brands in satisfying buyers with the new-vehicle buying experience. Jaguar performed particularly well in the salesperson and working-out-the-deal factors. Cadillac and Mercedes-Benz followed in the luxury brand segment rankings. These two brands also ranked second and third, respectively, in 2009. Among luxury brands, Lincoln demonstrated the greatest improvement from 2009, moving from sixth rank position to fourth in 2010.

MINI ranked highest among mass-market brands, performing particularly well in dealership facility, salesperson and delivery process. Mercury and GMC followed MINI in the mass-market segment rankings. The mass-market brands demonstrating the greatest improvement from 2009 were Hyundai (moving from 16th rank position to seventh in 2010) and Chrysler (moving from 15th position to eighth in 2010).

The Internet continues to play an increasingly important role in the new-vehicle shopping process, with more than three-fourths of new-vehicle buyers using the Internet during the shopping process. Twenty-four percent of buyers in 2010 submitted an online request for quote to a dealer and were, on average, more satisfied with the negotiation process and the price paid. However, perhaps expecting a quicker sales process, these buyers were more likely to express dissatisfaction with the length of the sales process than buyers who did not submit an online request.

"Dealers need to streamline the new-vehicle buying process for customers who do a lot of research online," says Jon Osborn, director, automotive research, J.D. Power and Associates. "These buyers tend to be affluent, well-informed and time-sensitive. They generally know the exact vehicle they want and how much they expect to pay for it. Despite often having little familiarity with the dealership they are buying from, they want to get in and out as quickly as possible. Dealers need to balance respect for the customer's time while still providing what the customer needs." For more information visit www.jdpower.com.

The average global consumer is worried, broke

Despite talk of the recession being a thing of the past, consumers found a full economic recovery in 2010 to be highly unlikely, as consumer confidence declined in 19 of 53 global markets according to the third-quarter 2010 Nielsen Global Consumer Confidence Index from New York researcher The Nielsen Company. One in four North Americans and one in five Europeans had no discretionary income. Rising food prices were a top concern for one in four

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names of note

The Mobile Marketing Association, New York, has elected **Joy Liuzzo** of Stamford, Conn., research company *InsightExpress* to its 2011 North American board of directors.

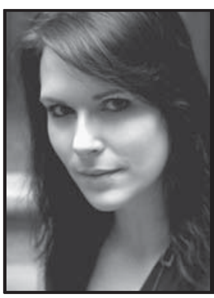
Scott Megginson has been named president of Toronto research company *Millward Brown Canada*.

Greg Fuson has joined *The Country Music Association*, Nashville, Tenn., as director, marketing research.

Chicago research company *Synovate* has hired **Will Gordon** as senior vice president, brand and communications. Gordon will be based in New York. In the U.K., Synovate has appointed **Peter Luff** as managing director, retail performance; and **Sam Scott** as head of project management, operations. Separately, Synovate Healthcare has hired **Chris King** as head of the European Oncology Monitor and **Nicole Oehlrich** as business consultant, oncology.

Luff

King



Oehlrich

Jacoud

Research Now, Plano, Texas, has named **Marc-Antoine Jacoud** managing director, Southern Europe. Jacoud will be based in Paris.

Omaha, Neb., research company *The MSR Group* has made the following appointments: **Marianne Pilling**, vice president and director, financial research; **Ted Lannan**, research consultant; and **Lindsay Lee**, junior research analyst.

London research company *Illuminas* has named **George Musi** vice president. Musi will be based in New York.

Quick Test/Heakin, a Jupiter, Fla., research company, has named **Jessica Gruber** project/sales assistant, 3Q research solutions; and **Denise Bryant**, **Khristine Layne** and **Christopher (CJ) Salazar**, manager. Quick Test/Heakin has also promoted **Kelly Parsons** to senior manager, 3Q research solutions; and **Susan Vincent** to vice president, account management.

Michael Katz has been named CEO of *interclick inc.*, a New York research company.

Fort Washington, Pa., research company *Panel Direct Online* has appointed **Meg Ryan** as director, sales.

Nina Hoban has joined New York research company *WorldOne* as manager, U.S. panel strategy and development.

Encino, Calif., research company *uSamp* has named **John Woolard** CFO. The company has also promoted **Dave Gaston** to regional vice president, survey solutions; and **Melanie Courtright** to senior vice president, client services.

Ipsos OTX MediaCT, a Los Angeles research company, has hired **Ian Wright** as executive vice president, corporate development. Wright will be based in New York.

Nuremberg, Germany, research company *The GfK Group* has promoted **Nick North** to CMO, media. As CMO, North will also serve as secretary of GfK's media board.

ESOMAR, Amsterdam, the Netherlands, has announced its 2011/2012 council: **Dieter Korczak,** president; **Mike Cooke**, vice president; and **Pravin Shekar** and **Dan Foreman**, council members.

Michelle Ogren has been promoted to vice president of *MarketVision Research*, Cincinnati.

Cincinnati research company *Burke, Inc.* has hired **Thania Farrar** as senior account executive, client services.

Denver research company *iModerate* has hired **Rob Tregenza** as vice president, client services.

Vancouver, B.C., research company *Vision Critical* has appointed **Justin Greeves** as senior vice president, public affairs, U.S. Greeves will be based in Washington, D.C.

Michael Heasley has been named partner at *Evolution Marketing Research*, Blue Bell, Pa.

Lightspeed Research, Warren, N.J., has hired three project managers to its Wimbledon, U.K., office: **Jeremy Weston**, **Cécile Van Der Eecken** and **Fanny Roche**. Additionally, **David Tripepi** has been promoted to PMO project manager, technology, global.

London research company *dunnhumby Ltd.* has named **Simon Hay** CEO, effective March 1, 2011. His promotion follows the move of company founders **Edwina Dunn** and **Clive Humby** to non-executive director roles.

Kevin Cornwell has been named business improvement specialist, financial and professional services, of *FreshMinds Research*, London.

Colin Auton has been promoted to managing director, *Ci Research*, Cheshire, U.K.

Reston, Va., research company *comScore Inc.* has hired **Amy Weinberger** as vice president, Australia and New Zealand.

product and service update

Research companies partner to get a read on Facebook's Fan Pulse

Boston research companies Chadwick Martin Bailey and Brand Networks have introduced Fan Pulse, designed to better understand the needs and expectations of companies' Facebook Fans by conducting research in Fans' News Feed. The Fan Pulse methodology is powered by Brand Networks' Social Survey application for Facebook, allowing surveys to be completed in the News Feed without users having to leave their Profile. Fan Pulse inquires on a variety of topics, such as Facebook usage behaviors; motivations for becoming a Fan or "liking" a page; and general communication preferences (i.e., type, volume, reactions to potential new content ideas/programs/applications, etc.). For more information visit www.cmbinfo.com or www.brandnetworksinc.com.

Scarborough Research launches PRIME Lingo

Scarborough Research, New York, has launched PRIME Lingo, a Web-based software platform designed to deliver data on cross-media consumption; local shopping patterns; consumer lifestyles; sports interest and demographics media; and marketing professionals. PRIME Lingo aims to allow users to profile consumer shopping patterns; monitor consumer behaviors; evaluate pre-calculated mean and median reports; create reach/frequency analyses; analyze newspaper audiences (online, in print and combined print/online audience); examine demographic groups; conduct trade area analysis; rank media outlets by market coverage, demographic reach or the penetration of other consumer targets; examine consumer behaviors; compare and contrast local markets; and develop multimedia plans for specific advertising/marketing targets.

The tool's interface includes a GO! Guide to help novice users; graphing functions; information-sharing features; 24/7 customer support and training; access to all Scarborough studies and special segmentations; and a Web-based interface with no downloads or software installation required. For more information visit www.myprimelingo.com.

Crowd Science releases a suite of free online research tools

Mountain View, Calif., research company Crowd Science has rolled out nine free online market research tools. The series, Free Market Research Tools, is aimed specifically at small-to-medium Web sites, blogs and other small Web properties that want to better understand their visitors. The first two applets to launch, called WHO and SAT, are intended to provide detailed profiles of the audiences visiting a company's site and how satisfied they are with the site experience.

WHO is a survey-based online market research tool for sites that want real-time insights into audience demographics, psychographics and other behaviors. SAT is a survey-based online research tool for sites that want to measure and understand site satisfaction. SAT is designed to measure site loyalty, demographics and other behaviors. For more information visit http://crowdscience.com/free_tools; click the GET IT NOW button; and enter invitation code PRNFREE99.

Eye-tracking-plus-qual tool aims to discover what works in an ad

U.K. research company eyetracker has debuted AdSight, an offering intended to tell advertisers which elements of an ad grabbed the reader's or viewer's attention and which elements retained it (or failed to retain it). Eyetracker incorporates both qualitative research and eye tracking to draw conclusions regarding the response to the ad and the reasons for the response. An AdSight project can be completed in approximately six-to-seven working days, with central location fieldwork taking place on the fourth or fifth day, followed by a full analysis conducted by advertising planning and research specialists. Analysis includes heat maps, gaze trails and qualitative insights. For more information visit www.eyetracker.co.uk.

GMI releases Interactive service for the U.S.

Bellevue, Wash., research company Global Market Insite Inc. has launched GMI Interactive, a survey-design technology that aims to develop interactive surveys using a suite of creative question formats intended to enhance respondent engagement and therefore increase data quality. The solution streams image and rich-media content to reduce reliance on traditional grid questions and check-box question formats. GMI Interactive also applies a modular approach to survey design to program studies in a matter of hours. For more information visit www.gmi-mr.com.

Arbitron introduces Event Retention Index for sporting broadcasts

Columbia, Md., research company Arbitron Inc.'s Custom Sports Services division has announced the Event Retention Index (ERI), a metric for Portable People Meter Radio Ratings Service subscribers. The ERI is designed to provide more clarity regarding the extent to which audiences stay tuned to sports broadcasts. The ERI estimates the proportion of a station's audience that stays tuned for the complete quarter-hours during a game relative to the average of the top 20 stations in the same market Monday-Friday, 6 a.m. to 7 p.m. For example, an ERI of 120 would indicate that listeners are 20 percent more likely to stay tuned for a complete quarter-hour of a game broadcast than the average of the top 20 stations for the aforementioned daypart. For more information visit www.arbitron.com.

Ipsos Vantis debuts first syndicated research offering

New York research company Ipsos Vantis has launched Vantis Files, a syndicated research offering designed to

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ROBIN QUINN
Client Services Manager

rquinn@truviewresearch.com
office: (512) 610-2870
mobile: (512) 550-9619

4411 Spicewood Springs # 503
Austin, TX 78759
fax: (512) 469-2904
www.truviewresearch.com

research industry news

News notes

New York organizations the **Mobile Marketing Association** and the **Interactive Advertising Bureau**, aided by the **Media Rating Council**, have partnered to release a set of mobile ad guidelines to establish an industry-wide framework for online advertising best practices. The groups' goals for the mobile ad guidelines include creating a global definition and methodology for counting Web impressions; distinguishing between an online ad impression and a mobile Web impression; and providing marketers with metrics for buying mobile Web ads.

The Marketing Research Association, Glastonbury, Conn., has released its Guide to the Top 16 Social Media Research Questions, a set of techniques and guidelines that aims to identify issues researchers should consider when conducting social media research and then frame a research industry discussion to set a baseline for further development of best practices and standards. The guide addresses reliability; execution; interaction with other kinds of research; ethics and legal compliance; data quality; process; and outputs. Jim Longo of Saskatoon, Saskatchewan, research company Itracks headed the guide-development committee.

Vancouver, B.C., research company **Angus Reid Public Opinion** successfully predicted the outcomes in the three U.S. states where it surveyed voters leading up to the mid-term Congressional election in November 2010. The electoral outcome for 13 of the 14 main candidates was predicted within the margin of sampling error advertised in the Angus Reid Public Opinion surveys released on Oct. 31.

Acquisitions/transactions

GfK Custom Research North America, New York, has acquired full ownership of Westport, Conn., research company **Interscope**.

M3 USA, parent company of Washington, D.C., research company MDLinx, has agreed to acquire **EMS Research**, London. The division will operate as M3 Global Research.

Alliances/strategic partnerships

Ebony Marketing Research, New York, has partnered with **List Service Direct Inc.** (LSDI), Leonia, N.J., to append LSDI's ethnic data to Ebony's respondent database.

New York research companies **GfK Roper Consulting** and **Weiner, Edrich, Brown Inc.** (WEB) have partnered to combine GfK's consumer trends data with insights from WEB. The companies' first collaboration will focus on the global economic climate.

Association/organization news

ESOMAR, Amsterdam, the Netherlands, has announced its 2011/2012 council: Dieter Korczak, president; Mike Cooke, vice president; and Pravin Shekar and Dan Foreman, council members.

Awards/rankings

The Marketing Research Association (MRA), Glastonbury, Conn., has recognized several industry leaders for service to the association and its members. Award recipients include Fort Washington, Pa., research company **Marketing Systems Group**, Celebrated Company Award; **Paul Posluszny** of Marketing Systems Group, Rising Star Award; **Debby Schlesinger Hellman** of Edison, N.J., research company Schlesinger Associates Inc., Shining Star Award; and the **Southwest Chapter of MRA**, Best Chapter Education Event Award.

Online networking group **Next Gen Market Research** has awarded **Sean Conry** of Vancouver, B.C., research company Techneos and **AJ Johnson** of Los Angeles research company Ipsos Open Thinking Exchange the Disruptive Innovation Individual Award for their collaboration in the area of self-completion mobile digital ethnography.

Plano, Texas, research company **Research Now** has been ranked 11th in the Dallas 100 Awards, presented by the SMU Cox Caruth Institute for Entrepreneurship, Dallas. To qualify, a company must be privately held and headquartered in the Dallas area. Rankings are based on the percentage increase in sales and absolute dollar growth in the three years preceding the event.

American Water, a Voorhees, N.J., water and wastewater services company, was named the winner of the 2010 EXPLOR Award at The Market Research Event 2010 in November 2010 in San Diego. The EXPLOR Awards recognize the most innovative applications of technology in research.

InContext Solutions, a Chicago virtual shopping company, has received the first Up-and-Comer Award presented at the Chicago Innovation Awards in November 2010, which highlight innovations that creatively fill unmet needs and can demonstrate a marketplace impact.

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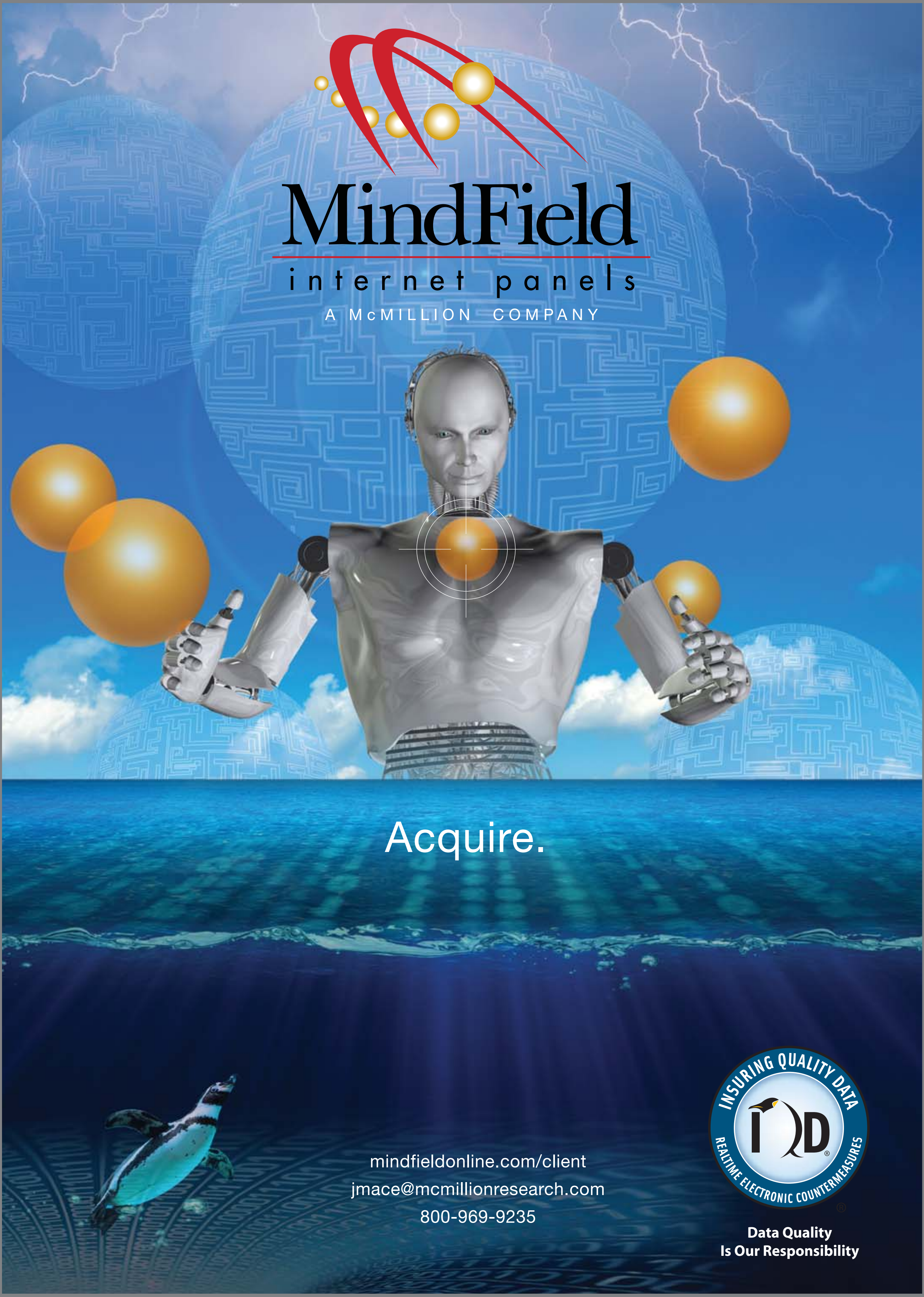
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Data Quality
Is Our Responsibility

By Kristin Cavallaro

Are global scales as easy as 1-2-3 or A-B-C?

Editor's note: Kristin Cavallaro is knowledge and data analysis specialist at Survey Sampling International, Shelton, Conn. She can be reached at 203-567-7294 or at kristin_cavallaro@surveysampling.com. To view this article online, enter article ID 20110101 at quirks.com/articles.

snapshot

Survey Sampling's Kristin Cavallaro reports on findings from a seven-country study that tested two versions of a five-point Likert scale - one verbal, one numerical - to examine country- or culture-specific differences.

Effective global research that gathers accurate consumer and market information is essential for building successful global sales, marketing and expansion strategies. With the growth of the Internet and social media around the world, it has become easier and less expensive to conduct global research via online surveys. The result has been an increased volume of online global research projects.

As we depend more on insights gathered globally online, it is critically important that we understand what our survey respondents really are saying when they give us an answer. That means we must truly understand the countries and cultures of our research participants. We already know that people around the world speak different languages, practice different religions, eat different foods, celebrate different holidays, buy different brands and watch different TV shows. These are all factors that market researchers consider when designing international online research studies. We translate surveys into the appropriate languages, add appropriate demographic questions and set appropriate quotas. The survey is then good to go, right? Not necessarily.

There are many differences we need to account for in the areas of global research and questionnaire design that we typically don't consider, because we are victims of what we do not know. These differences include the social and cultural variations that drive respondent thought processes around the world. To account for the variations, we must go far beyond simply making sure brand names are localized and proper grammar is used.

One key difference among global research participants that many market researchers aren't aware of is the variations in how people from different cultures respond to different types of questions and response options. Scaled questions offer a clear example of these variations and their impact. The idea that the Likert scale is universal in application is a misconception. In fact, the way we present the Likert scale can yield different results within and between cultures.

The Businessdictionary.com defines the Likert scale as a "Method of ascribing quantitative value to qualitative data, to make it amenable to statistical analysis. Used mainly in training

Figure 1: Examples of Likert Scales

Strongly agree Somewhat agree Neither agree nor disagree Somewhat disagree Strongly disagree	Strongly agree Somewhat agree Slightly agree Neither agree nor disagree Slightly disagree Somewhat disagree Strongly disagree	Strongly disagree Somewhat disagree Neither agree nor disagree Somewhat agree Strongly agree
1 Strongly agree 2 3 4 5 Strongly disagree	1 Strongly agree 2 3 4 5 6 7 Strongly disagree	1 Strongly disagree 2 3 4 5 Strongly agree

course evaluations and market surveys, Likert scales usually have five potential choices (strongly agree, agree, neutral, disagree, strongly disagree) but sometimes go up to 10 or more. ... Named after its inventor, the U.S. organizational-behavior psychologist Dr. Rensis Likert (1903-81)."

In practice there are many variations of the Likert scale (Figure 1). These variations can range from verbal to numeric and from scales of five to scales of 10 data points. The five-to-seven-point scales are most common for marketing research surveys.

Members of academia have conducted some research on the optimal Likert scale. Most have found it difficult, however, to isolate which form provides a higher degree of validity and therefore tend to focus on reliability.

Understand the differences

SSI decided to perform its own test on Likert scales. The goal was not to find the Holy Grail of Likert scale formation in each country but to understand the differences associated with the different ways of presenting the scale to respondents around the globe.

To achieve our objective, we launched a seven-country study which tested a five-point Likert scale presented in two different manners. The scales we chose are those most commonly used in market research studies worldwide. The first was a verbal scale in which all points were defined in words (i.e., strongly agree, slightly agree, neither agree nor disagree, slightly disagree, strongly disagree). The second was presented a numerical scale where only the first and last options were anchored or defined (1 = strongly disagree, 2, 3, 4, 5 = strongly agree).

The questionnaire included six different sections: self-comparison to set reference groups; women's rights; importance of cultures and traditions; dependent versus independent thought processes; public appearance; and acceptance/likelihood to purchase a new product concept. Questions were grouped into like subjects, enabling us to conduct reliability testing by analyzing how well the responses to these questions fit together within topic areas.

We used Cronbach's Alpha reliability test, which essentially enabled us to look past the "noise" that exists when using scaled data. (The test is explained in more detail later in this article.) The countries included in the study were the U.S., the U.K., Italy, Japan, China, Brazil and Mexico.

One piece of research that provided inspiration and guidance for this project was a paper by Heine, Lehman, Peng and Greenholtz on the cross-cultural comparisons of subjective Likert scales. The paper's objective was to determine a pattern in cross-culture responses to questions, specifically between Asians and North Americans. It directly related to SSI's research on the use and analysis of Likert scales across different cultures.

Again, we were not looking to find fix-all results from this study, as many have tried and failed to do before us. Instead, the focus was on findings that would provide a new and deeper understanding of cultural differences. Our results give us interesting insights into how the formation of a question and its response option can affect study outcomes. They also provide a foundation for further research into how cultural differences impact findings.

Did the various Likert scale presentations produce different data? Yes, there were definite differences in results even within the same country. Our research verified that that the way we presented the Likert scale did in fact produce different data. The table of means (see Table 1 in online version of article) reveals the differences for each question or set of questions. It highlights all the means that were statistically significantly different at a 95 percent confidence level. In addition, we've included a top-box table (see Table 2 in online version of article) to ensure that our results are not due to satisficing.

For the first set of questions (comparison to reference groups), respondents were asked to compare themselves to their friends and family on intelligence and success. In Italy, China, the U.K. and Brazil, a higher percent of respondents rated themselves smarter and more successful than both their friends and their families in the numeric version of the questionnaire than on the verbal version. In contrast, Japanese and Mexican participants rated themselves smarter and more successful on the verbal version of the questionnaire.

We also found differences across the next set of questions, which asked respondents how much they agreed or disagreed with several statements related to a subject. In almost all cases across all countries, the verbal scale yielded a higher likelihood to agree with the statements than the numeric scale.

So are verbal or numeric scales better? While the results prove that the way we present the Likert scale affects the data, they don't reveal which version is the most valid. By valid, we mean which set of results is most correct or true. Because we do not really know whether or not our respondents are in fact smarter or more successful than their friends and family, we can only look at which scale type appears to be most reliable - the one that is the better measuring tool.

Figure 2: Cronbach's Alpha Test

		Women's Rights	Cultures and Traditions
Italy	Version 1	0.704	0.803
	Version 2	0.639	0.863
Japan	Version 1	0.577	0.749
	Version 2	0.648	0.712
China	Version 1	0.667	0.717
	Version 2	0.605	0.721
U.S.	Version 1	0.671	0.807
	Version 2	0.591	0.803
U.K.	Version 1	6.44	0.715
	Version 2	0.662	0.714
Brazil	Version 1	0.47	0.754
	Version 2	0.471	0.766
Mexico	Version 1	0.494	0.794
	Version 2	0.45	0.799

Conducted a reliability test

To discover which scale is most reliable, we conducted a reliability test, using Cronbach's Alpha test, which groups the like subject questions together and looks at how closely they correlate or fit together. The test looks at every combination of responses to like-minded questions and determines the correlations between the responses in the data set. It then assigns a score on a scale from 0 to 1. The closer to 1, the more reliable the scale is estimated to be. In Italy, Japan, China and the U.K., the verbal versions of the Likert scales performed better than the numeric scales via a Cronbach's Alpha test, meaning they had a higher score than the data from the numeric scales.

We also conducted a Cronbach's Alpha test across the second and third sets of like questions. The first set of questions in this group pertained to women's rights. As you can see in Figure 2, Italy, China, the U.S., and Mexico performed better with the verbal scales while Japan, the U.K., and Brazil performed better with the numeric scales. These results flip-flopped for most countries with the next section on cultures and traditions, with the exception of the U.S. and Brazil.

Some cultures gravitate toward the center

The paper by Heine, Lehman, Peng and Greenholtz points out a discovery by Chen, Lee, and Stevenson in 1995 that respondents from some cultures tend to gravitate toward the

Figure 3: Comparison of Data From U.S. and Brazilian Responses

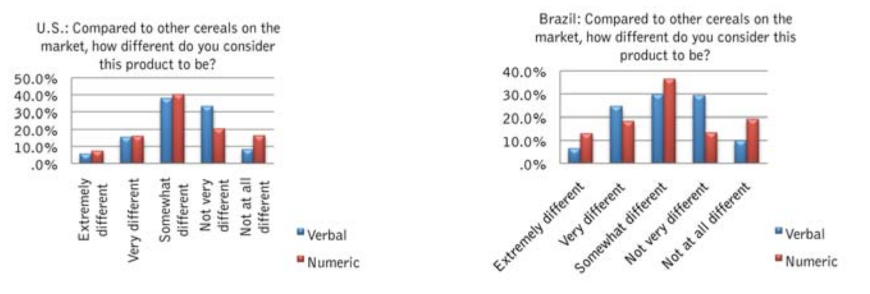


Figure 4: Verbal Scale - Likelihood to Purchase

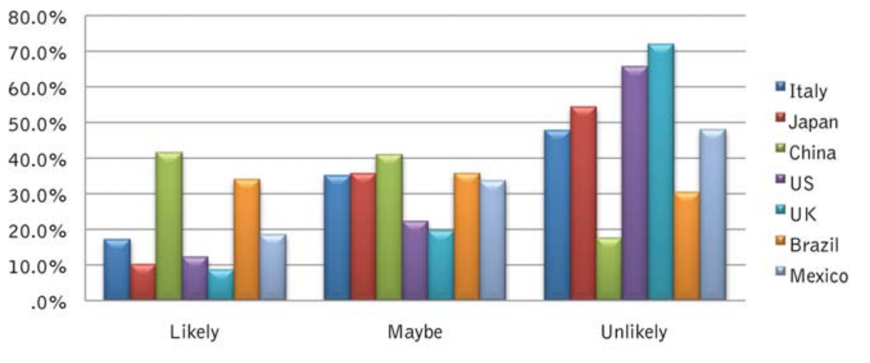
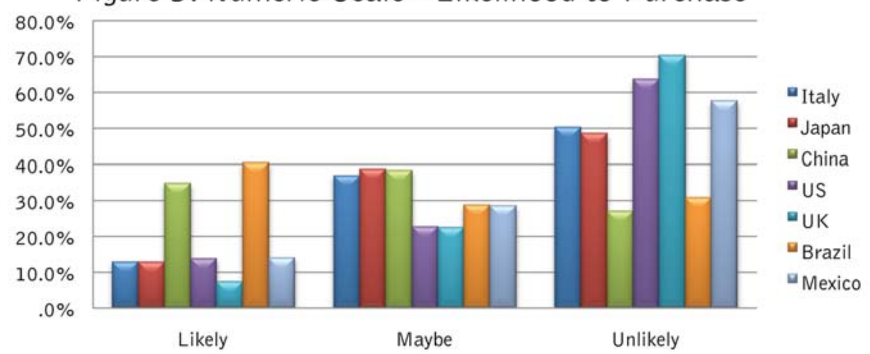


Figure 5: Numeric Scale - Likelihood to Purchase



center of the scale more than others. In looking at a simple distribution curve across several questions, we confirmed that finding in our own research.

The tendency to gravitate to the center was particularly noticeable in Brazil when we looked at the verbal scale. Notice in Figure 3 the middle three response options have a similar count when respondents are evaluating a breakfast cereal concept. Now take a look at the numeric scale on this same question. The central gravitation that we saw in the verbal scale begins to disseminate toward the outside, more extreme responses.

This supports earlier findings with Brazil that the numeric scale appears to be stronger than the verbal scale in that country. When we compare this to the U.S. data for the same question, we see the U.S. distribution curve is much more evenly distributed in both the verbal and numeric scales.

There are also thoughts and concerns that some cultures tend to respond more favorably toward concepts and statements than others simply because of their culture – not because they actually prefer the concept. This is true among cultures that tend to be more polite and conscious of others' feelings.

We can see from the graphs in Figures 4 and 5 that this tendency to be more positive manifests itself when comparing the likelihood to purchase a breakfast cereal. The Chinese, who are thought of as typically responding more favorably toward concepts, are the mostly likely to answer that they would purchase the cereal. The cereal market in China is actually positive, especially for cereals that are considered to be healthy. While cereal is not the most common item on the menu for breakfast, more Chinese people are looking for alternatives to the traditional Chinese breakfast.

Brazil also showed a favorable response to the cereal concept. In the numeric version, we see Brazilian and Chinese respondents switch positions, but both still were the most likely to purchase the cereal. Conversely, Japan, the U.K. and Italy were far less likely to consider the new cereal as different or to purchase it.

Different formations produce different results

Clearly, when it comes to Likert scales, there is no "one size fits all" approach. Different formations can produce different results – both within and across countries. In addition, different cultures have different response styles, even when faced with nominally identical scales.

Therefore, global researchers must carefully think through both how they ask questions and how they analyze results. There are many factors, both known and unknown, that influence findings around the globe. We would be comparing apples to oranges in many cases if we tried to build one perfect model that worked in all countries.

In all research, not just global research, it is critical to define and understand the target respondents and the cultures with which they identify. For the market research industry to uncover all the facts about scales and their effects on responses in every country and for every subject, we'll need resources beyond what many have now. Until then, we need to be cognizant of all potential differences and adjust our global research designs to accommodate cultural variations – not just in language but in all aspects of lifestyles, attitudes, thought processes, social mores, behaviors and responses tendencies. | Q

online research

By Gregory Cobb

Motivate and inspire

How to establish and nurture online discussion-board conversations

Conducting research online with discussion boards is an appealing option for many companies looking to reach out over a large geographic area or collect information on difficult-to-reach segments. It allows researcher and respondent to operate on their own schedules, corresponding on their own terms. Without restraints on location or time, studies can easily stretch across weeks, providing the research team with a more detailed understanding of the participants' lives than a single in-person visit or interview. Combine this flexibility and scope with increasingly mobile video-capture devices and researchers now have a powerful tool that, used properly, places them directly in the action as seen from the consumer's perspective.

As with any research, there is always the concern that recruits will not show up to participate. Respondents in an online study are self-policed; it is up to them to sign on at the appropriate time, and, as the study draws on, to continue posting. When conducting online research, the question is no longer simply, "Will they show?" but also, "Will they stay?" With the longer study lengths, anywhere from one week to a few months, the concern about participation compounds.

Editor's note: Gregory Cobb is project manager at Psyma International Inc., a King of Prussia, Pa., research firm. He can be reached at 610-992-0900 ext. 118 or at gregory.cobb@psyma-usa.com. To view this article online, enter article ID 20110102 at quirks.com/articles.

snapshot

The author offers tips on mounting successful discussion-board research projects. With planning and diligence, researchers can get the information they need while also ensuring a fun and fulfilling experience for respondents.

We all know how difficult it can be to motivate a respondent across the table, much less one 3,000 miles away. In the following paragraphs I will outline a few of the techniques we have used to keep respondents engaged. This is by no means a complete list of motivators that guarantee online research success. It is a collection of tools we have found to capture respondents' attention and create a space in which they are not only comfortable but excited to share their opinions and experiences.

Set expectations. Don't underestimate the importance of the initial communications with the respondents. You will not be there in person to deal with questions about the platform or expectations, and e-mail, the primary form of contact you will have with the respondents, is a poor proxy for face-to-face conversation when dealing with an upset consumer.

We start by outlining the complete terms of the research in the screener; such as, expected time commitment per week, number of assignments and length of time for the study. We also include questions selecting for capabilities and comfort with equipment or tasks that are out of the ordinary or might require a certain level of technical or social grace. An example of such equipment would be the use of video cameras. These recording devices are highly valuable but useless if the respondent cannot upload the videos to the study Web site.

We have found that a reminder correspondence a few days before the study kicks off is also important. This helps manage the expectations of your respondents, many of whom were recruited a week or two in advance. This also gives the moderators an opportunity to introduce themselves and start building a relationship with the participants that will keep them engaged throughout the study. In this e-mail/letter, be sure to provide more than the basic information, letting the moderator's personality show. Including a picture can go far in terms of retention down the road.

Send them something, anything. Everyone enjoys receiving packages. Starting a study by opening an important-looking box can almost ensure full participation for the first stage of your research. Beyond the excitement of opening a cardboard box or overstuffed envelope, the tool you send will serve as a physical reminder of your investment in them as a respondent and their responsibility to you.

Flip video cameras are light-

weight, easy to use and, most importantly, inexpensive tools that respondents love to use. These cameras can provide the research team with compelling video to support the findings distilled from online posts. But respondent packages do not need to be high-tech. We have had great success with "field reporter kits," small notebooks and pens with research schedules and observation tips pasted in the covers. These notebooks are inexpensive and can be personalized and modified, by researcher or respondent, in many useful ways. Product samples and topic-specific stimuli are also great send-aways. What you send is important, but that you sent something is just as motivating to the participant.

Build a community. The same force that drives the immense popularity of social media sites such as Facebook, Twitter and Reddit can be harnessed to turn your online research study into a success. People find it exciting to have their thoughts and ideas considered and commented on by others. We create a community by requiring our respondents to interact with each other. Participants post an initial response to a topic or question before they are able to see others' responses. Then we require that each participant reply to at least two posts by other respondents. The first few responses trickle in, but after the first topic the floodgates open. As the respondents get to know each other, the anticipation of their answers becoming the hub of a heated conversation motivates them to sign on early and often. It is not unusual for respondents to exchange e-mail addresses at the end of longer studies.

Moderator involvement is also an important factor in the strength of the community. Frequent, personal interaction with the respondents can create an environment which feels closer to a gathering of friends than a research study populated by strangers with a monetary reward the only motivation to participate. Thanking respondents for their contributions and candor is possibly more important online than in person.

Keep it interesting. This is where the different tools you sent can be used to their full potential. When developing assignments, text-based or otherwise, strive to inspire respondent creativity. Switch up the venue by requiring the respondent to record video, pictures or simply notes in a setting outside the home. Set limits on the tools or topics they are allowed to use in their next post. Ask the participants to hand the video camera, notebook or keyboard over to a friend or family member, to record their perspective on an issue.

As with any creative exercise used during a market research study, there is a risk involved. Some participant personalities may not be suited to certain activities and this is where knowing the sample and choosing the appropriate exercise is important. That being said, the virtual anonymity provided by the

Internet is an amazing social facilitator and we continue to be surprised at the honesty and courage exhibited by our respondents, both in terms of the personal detail they share and the locations in which they share it.

Give them a reason to stay. One of the major differences between online qualitative research and in-person qualitative research is the requirement of prolonged participation. In-person research, from the respondent's point of view, is generally a span of a few hours on a set day. Online research asks the respondent to make an effort over a period of days, if not weeks. As interesting as your study may be, the main reason people are agreeing to participate is the promise of some reward for their involvement. The incentive is probably the most important motivator in terms of retention, if not quality of contribution. We use a progressive incentive that keeps a reward halfway to the horizon at all times.

For a multi-week study, we offer a weekly incentive, contingent on completion of all required assignments for that week, and a final bonus incentive for completion of the entire project. For example, a respondent who completes a four-week group can expect four incentive checks and a single bonus check, generally twice the value of the incentive checks. If you sent a package which you would like returned it is a good policy to require receipt of the package before distributing the final incentive and bonus checks. In the case of more expensive packages such as flip video cameras, it is good practice to ensure the combined final incentive and bonus amount is greater than the replacement value of the camera.

Becoming more powerful

Online qualitative research is becoming more popular and more powerful. Internet connectivity is virtually ubiquitous in the U.S. The technological knowledge required to participate in online discussions, capture images and video and interact with online content is becoming less complex while the general population embraces more powerful, more mobile, more media-driven devices. As researchers, it is our responsibility to our clients to tap into this growing pool of communication platforms and distill from it the rich insights that will drive innovation.

As full of potential as the online space is, it presents us with unique challenges. The most relevant to online qualitative market research is motivating people you cannot see or hear to share with you their thoughts, opinions and reasoning. With the tools and techniques listed above, we have been able to generate huge amounts of text, video and discussion on a wide range of topics. So much data in fact, that organizing and analyzing the output of a discussion board that lasts a month are the most time-consuming tasks. This wealth of data, if properly managed, is an asset itself and can be used by clients as a resource for understanding their consumers beyond the specific scope of the study. | Q

online research

What can Web do for you?

Use these five Web-based approaches to shrink your research timelines, costs

By Andrew Cutler

Did you hear the news? The world has shrunk. Actually, it's been shrinking for centuries, as new forms of transportation have made formerly-inaccessible places more, well, accessible. It goes without saying that a trip from Philadelphia to New York, let alone to New Delhi, is faster and easier today than it was just 100 years ago. What is less apparent, perhaps, is that the advent of the Internet has essentially brought all of us even closer together, as geographical distances have become less meaningful than ever before. At the same time, high-speed Internet connections, smartphones, Twitter feeds and the like are transforming the world of market research. To put it bluntly, the rules of the game have changed completely.

Imagine for a moment that your client is planning to launch a new pharmaceutical agent designed for patients with an extremely rare disease. The client would like you to interview physicians who treat it, regarding their experiences with existing therapies and their reactions to print advertising concepts. Perhaps there are 300 specialists scattered across the United States who treat this disease. Recruiting even six or seven of these physicians for in-person research at a local focus group facility would be difficult, if not impossible.

Let's imagine that your client also wants to learn about the experiences of the patients themselves. Finding patients with this disease might be feasible, but many of these patients may be too ill to leave home and come into a focus group facility.

What to do? Just because you want to talk to these hard-to-reach populations, are you out of luck? Do you need to give up all hope of having something resembling an in-person research session with your client's customers?

The answer is, emphatically, no. To quote from a certain TV show, we have the technology. The benefits of using Internet technology include:

- Cost savings: no travel expenses for moderator, client or respondent and no field agency expenses.
- Time savings: no travel time and (often) faster recruiting.
- Reliability: no delays or rescheduling due to weather.
- Versatility: no need to limit your sample to local/large-metro-area respondents.

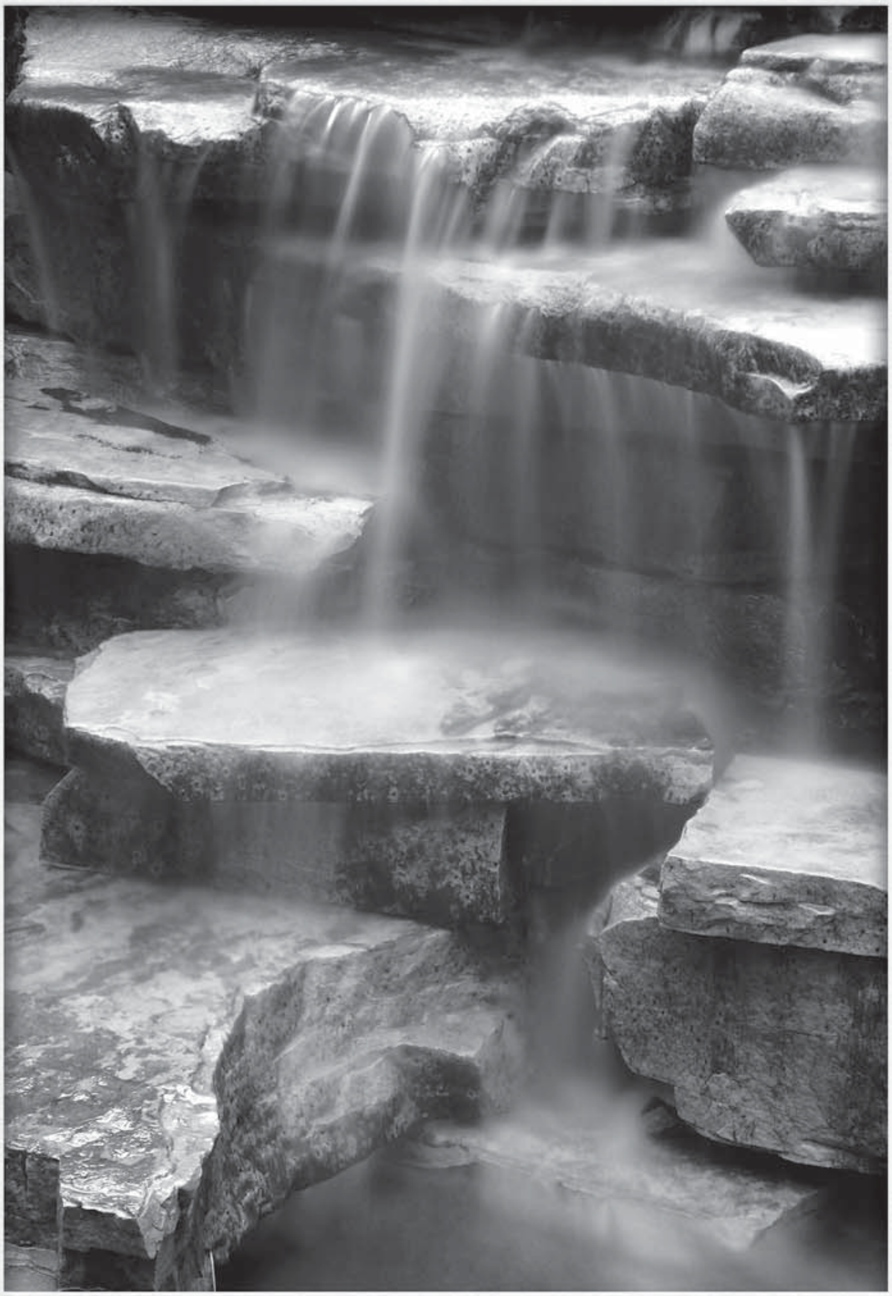
Let's take a look at some of the

snapshot

This article outlines the pros and cons of a handful of online research techniques, from text-message-based surveys to Web-assisted phone interviews.

Editor's note: Andrew Cutler is vice president of Integrated Marketing Associates, a Bryn Mawr, Pa., research firm. He can be reached at 610-527-5500 or at acutler@imalink.com. To view this article online, enter article ID 20110103 at quirks.com/articles.

In the fine art of research,
the shades of gray complete the masterpiece.



While data gives answers in black and white, it's the subtleties of the gray areas that give you the big picture. Burke understands the nuances of research. Grounded in academic principles and guided by ongoing internal research, Burke helps you determine the best research method, gather the information, and develop the best strategy for actionable results. You will have confidence in your decisions because you have the experts at Burke to support you. Visit Burke.com or call 800.688.2674 to find out more.

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The Fine Art of Marketing Research

	Advantages	Disadvantages
Web-Assisted Telephone Interviews	• Recruiting is faster and easier than with in-person research • Moderator can probe participant • Stimuli can be presented on secure, password-protected Web site	• Participant must be at a computer, and on the phone • No visual/facial communication between moderator and participant
Online Focus Groups	• Highly interactive • Moderator can probe participants • Stimuli can be presented on secure, password-protected Web site	• Participants must be at a computer, and on the phone • Participants must "meet" at agreed-upon date and time
Online Bulletin Boards	• Participants can respond when they wish to, 24/7 • Private, yet somewhat interactive: others' responses are visible and dialogue is encouraged • Participants can post text, audio, images, etc.	• Not as interactive as a focus group session • Participants must be at a computer (or other Web-accessing device) • No real-time Q&A
Text-message/Twitter-based research	• Participant only needs a cell phone, not a computer • Participant can respond from any location, as long as they have their phone	• Limited number of characters allowed in each text message • No interaction between participants • No visual/facial communication between participants
Online Journaling/Blogging	• Participants can provide data when they wish, 24/7 • Participants can post text, audio, images, etc. • Privacy is provided to each participant	• Requires additional analysis time • No interaction between participants • No Q&A component

research methodologies that are now available in our brave new cyberworld, many of which may be suitable for your research needs. In this article, we'll examine five methodologies in particular: Web-assisted telephone interviews; online focus groups; online bulletin boards; text-message/Twitter-based research; online journaling/blogging. (The accompanying chart collects some of the pros and cons of these five approaches.)

Web-assisted telephone interviews

One of the first research techniques to exploit the power of the Internet, the Web-assisted phone interview allows researchers to conduct one-on-one in-depth phone interviews (TDIs) with respondents around the country and to display stimuli to each of the participants. Via the Internet, you can show visual concepts, positioning statements, magazine advertisements and other materials to respondents who are thousands of miles away. With the appropriate platform, moreover, the interviewer can control the duration of exposure to each stimulus.

Most software platforms used for this purpose have built-in safeguards to prevent participants from downloading or printing the stimuli that are posted, thereby minimizing security/confidentiality concerns.

There are essentially two types of platforms that are used to assist in phone interviews.

- A Webconferencing program that allows the moderator/interviewer to post materials in real time onto a screen that the respondent is viewing. This type of program gives the interviewer direct control over what the respondent is looking at throughout the interview. Webconferencing programs require each participant to go to a specific Web site and log in with a username and password that has been provided by the interviewer.
- A hosting site that is specifically set up to walk the respondent through a series of stimuli and (usually) to collect simple data from them (such as ratings or rankings) as the interview progresses. The Web site programmer can later collate the responses and provide the researcher/client with a summary of the data, along with basic statistical information.

Whichever approach is chosen, Web-assisted TDIs can offer significant advantages over the plain-vanilla phone interview. For the research project discussed earlier, for example, you could opt to interview the physicians (and patients) by telephone and obtain their reactions to advertisements that you post online.

Online focus groups

Have you ever imagined what it would be like to bring in respondents from various regions of the United States, or even the globe, into a single focus-group room? The online group is, arguably, the next best thing to being there. Thanks to Webcams and high-speed Internet connections, you can now conduct a face-to-face focus group with respondents from the remotest corners of the country.

Rather than meeting in an actual room, online focus group participants are in a virtual room in cyberspace that is being videostreamed live over the Internet. Because all the participants are visible on the computer screen, the moderator can see their facial expressions and body language; the participants can see the moderator as well. The client can watch the focus group on their computer screen, just as if they were in the back room behind a one-way mirror. As in a traditional focus group setting, participants are informed that the client is watching but they cannot actually see the client.

This is an approach that lends itself well to situations where you have very few respondents who would qualify for the research, such as the aforementioned project with hard-to-find physician specialists. If you wish to obtain the reactions of such audiences to various materials (such as advertisements), the online focus group allows you to post the materials on the computer screen, for all the respondents to examine and react to, just as they would in an in-person focus group.

With the online focus group approach, the expense, hassle and even the carbon footprint of traveling is eliminated for the moderator, client and respondents. If you want to assemble a group of respondents from around the country (or around the world) or if you want a mix of urban, suburban and rural participants, an online focus group may be just the solution that you're looking for.

Online bulletin boards

Let's imagine that the aforementioned health condition for which your client has developed a new product is not only rare, but potentially embarrassing for patients. Your client is interested in understanding the day-to-day experiences of these patients as they use the product over the course of a week. Because it's a sensitive topic, online focus groups may not be the best solution, as participants might find it awkward to candidly share their experiences with others, even if those others are suffering from the same disorder.

Online bulletin boards may be a better solution. By hiding faces and keeping responses anonymous, online bulletin boards provide a means by which participants can openly share their experiences without feeling like others are watching. Despite the anonymity, the research process is interactive: participants see the feedback that others have provided and then react to and comment on this feedback themselves. These conversations are available for you and your client to view at any time.

The online bulletin board methodology has other advantages as well. Instead of a one-time session, feedback is collected from respondents over time: participants in online bulletin boards typically report their thoughts and experiences on multiple occasions over the course of a week rather than at a single point in time. Respondents can use other media besides the printed word to express themselves; for example, they can post audio recordings, photographs and even video files to the bulletin board.

Recruiting participants for online bulletin boards is much easier than recruiting for in-person research: as with online focus groups, anyone, anywhere can participate in a given online bulletin board research project if they 1) meet the recruiting criteria and 2) have regular access to the Internet. Additionally, a larger number of participants can interact than is practical in a focus group setting; indeed, 30 participants is not uncommon for this type of project.

Text-message/Twitter-based research

The research community, ever alert to new and different ways to obtain information from target audiences, has recognized that Twitter and other forms of text messaging have research potential. One advantage to these activities, from a research perspective, is that the respondent does not have to be at a computer to engage in them; instead, they simply have to have a cell phone with them.

A typical text-message-based research platform allows researchers to send out text-message questions to participants at specific times of the day, over the course of several days or even weeks. A soft-drink company, for example, might text participants at mealtimes to find out what beverage they are consuming with their meal, how much (or not) they are enjoying it and what their plans are for their beverage choice later that day. Respondents can text their answers back immediately, thereby providing an experiential, real-time response that is arguably more accurate than one provided after the event (e.g., the meal or the trip to the grocery store or the television program) has concluded.

Questions can be qualitative (i.e., "How do you feel about the product selection in aisle four?") or quantitative (i.e., "On a 1-7 scale, how would you rate the flavor of the coffee you are drinking?"). Text-message research allows the researcher to follow up with specific respondents, based upon their response to the initial text-message query. Transcripts of the questions and answers, sorted by question and also by respondent, are automatically generated for the researcher and the client.

One attractive aspect of text-based research is that a large sample of respondents can be invited to participate; often, these studies involve 50 or more participants. Because the cell phone has become so ubiquitous, people from virtually all walks of life usually own the technology necessary to participate.

Online journaling/blogging

Humans are funny creatures. Although we may shut the shades to keep our daily activities hidden from our next-door neighbor, many of us also are increasingly sharing our daily lives, online, with the rest of the world and often in excruciating detail. Blogging has become a popular activity among young and (to a lesser extent) old. It seems that the impulse to reveal can be as strong as the impulse to conceal.

Because blogging can provide an up-close, unvarnished account of people's thoughts and day-to-day lives, many researchers are now incorporating blogging into their research armamentarium. Participants in blog-research projects are often given assignments or topics to write about. These assignments may be provided online on the project home page. Once a blog assignment is completed, a transcript is sent to the researcher/client. Depending upon the nature of the research, blog-research projects can be in-field for as little as a week or for several months or more.

As an example, an automobile company may loan selected individuals a car to test drive for a week and have them provide online written descriptions of their experiences each time they drive it. Participants can include photos, video clips and other media to supplement their written accounts. Unlike typical online blogs, however, the research blogs are semi-private, accessible only to the researcher and the client.

As already mentioned, blogging and other online research methodologies enable the recruitment of participants who live in remote regions of the country and/or who meet very specific criteria for participation. Blog research is also relatively inexpensive; a typical project may involve over 100 participants who are paid a relatively modest sum to participate. Because of the relatively free-form nature of this research, individuals recruited for these studies usually report that they enjoyed participating. (Of course, the analysis of this data is often more complex and time-consuming.)

Many new vistas

Regardless of which methodology is utilized, today's Internet technology opens up many new vistas for the market researcher. By exploiting the Internet's ubiquity, researchers can provide more efficient and economical solutions to their clients, without necessarily sacrificing the versatility and richness of in-person research. | Q

online research

Know your markets

Methods for ensuring online sample quality around the world

By Chuck Miller
and Suresh Subbiah

With the continued expansion and maturation of online market research, quality of online panels and rivers continues as an area of focus for the market research industry. Naturally, the industry has high expectations for its evolution. A great many initiatives are underway to advance quality, aggregating the collective intelligence of industry thought-leaders. All of these are valuable and critical for producing better-quality data. Beyond current efforts around respondent validation and de-duplication (among others) some key questions remain:

- To what degree do these efforts produce quality data, especially on a global scale?
- How does sample differ in North America, Europe and APAC and how does this impact quality?
- Can the industry standardize panel (and river) quality globally?

Quality in the research world is a complex equation, with a number of factors in play. To address quality concerns adequately, researchers and panel operators must keenly understand myriad factors to produce high-quality global research.

To produce quality online sample globally, expertise is required in four key areas: understanding differences in capabilities and cultures on a global scale; standardizing global sampling processes, while allowing for regional differences; leveraging technology appropriately to improve standardization; and engaging global survey takers through a variety of methods.

snapshot

While much of the world's population now has Internet access, methods of developing online panel sample aren't the same in every country. Regional differences abound, requiring location-specific approaches for effective sample generation.

1. Understanding differences in capabilities and cultures on a global scale

Given vast differences around the globe, grasping regional differences is no small feat. The combination of differing Internet characteristics (penetration, usage, etc.) and cultural characteristics (such as attitudes and behaviors) makes solving for best practices quite complex. Obviously, one size does not fit all.

As such, sound evaluation and a nuanced approach are needed. The bar may be higher here for panel operators, even more so

Editor's note: Chuck Miller is president of research firm DMS Insights, a uSamp company, in the Dallas office, and chief research officer of uSamp, an Encino, Calif., research firm. He can be reached at 800-409-6262 or at chuck@dmsinsights.com. Suresh Subbiah is chief operating officer, uSamp, in the firm's Trumbull, Conn., office. He can be reached at 877-217-9800 or at suresh@usamp.com. To view this article online, enter article ID 20110104 at quirks.com/articles.


19% IT'S A PHONE
12% IT'S A COMPUTER
7% IT'S A CAMERA
62%
IT'S A PACIFIER?

than for those executing global surveys. Without fundamentally sound sample, even the best study execution will yield inaccurate results. As such, sample providers must thoroughly understand every market in which they work. There is no substitute for regional knowledge, as it allows the sample provider to determine practicality and best approaches to sampling and interviewing in a region. The next step is applying this knowledge to produce the best sample given each situation and consult clients on regional capabilities and limitations – including when to supplement online interviewing with offline approaches.

Reinforcing the value of regional knowledge, consider these examples:

- Online studies requiring a census-balanced gen-pop sample are now commonplace in the U.S. As such, many researchers may unreasonably assume this can be done in countries with large Internet populations like India and China. But while the number of Internet users is very high in these countries, the composition still skews toward urban users in larger cities.
- In some areas, such as the United Arab Emirates, the floating population is high – meaning the profile of locals vs. expatriates varies greatly. In these situations, it's essential to understand the target audience in light of the research objectives (i.e., targeting current residents or indigenous populations). These countries require more frequent updating of panel profiles, given the more transient nature of the population.
- In countries like Japan and France panelists are very sensitive to how they are treated and survey quality and communication are critical. Regional knowledge around social norms, scale usage and response interpretation is critical.
- Beyond general sensitivities, some topics simply may not work on a global scale. In particular, research related to some medical conditions can be problematic. Additionally, care should be taken to understand legal implications of certain topics – some may not be possible to inquire about in certain countries.

Most of us realize that sampling and survey approaches that work in the U.S. may not work in other markets. Simply translating U.S. English into other languages is not sufficient, providing yet another reason why regional specialty is critical. Demographics, economy, online penetration and culture all influence respondent characteristics and subsequent data quality. Among these influences, culture most frequently tends to be overlooked.

2. Standardizing global sampling processes, while allowing for regional differences

As noted, regional expertise is critical for creating and maintaining a high-quality sample. Global panel management needs and processes for consumer, B2B and specialty panels are different and require differing strategies by country. Because certain aspects of panel management can be global while others must be local, the key to success is establishing the right blend of practices and then applying standardization both locally and globally.

In particular, online sample providers should look to standardize certain elements in every engagement: panel and/or river recruitment processes, with an emphasis on sourcing stability; respondent registration processes, including consistency of data collection and user experience where appropriate and possible; respondent profiling, including questionnaire elements and communications; sample selection, including invitation and usage rules.

Most important (and often overlooked) is the means of standardizing sample recruitment and sample frame construction. Research data is only as good as a drawn sample, which in turn is only as good as its sampling frame. So, fundamentally, to produce good research it's necessary to produce a solid and consistent frame – as well as employing solid sampling practices. Consistent sourcing of sample is critical and, while it may seem obvious, standardization pays dividends here.

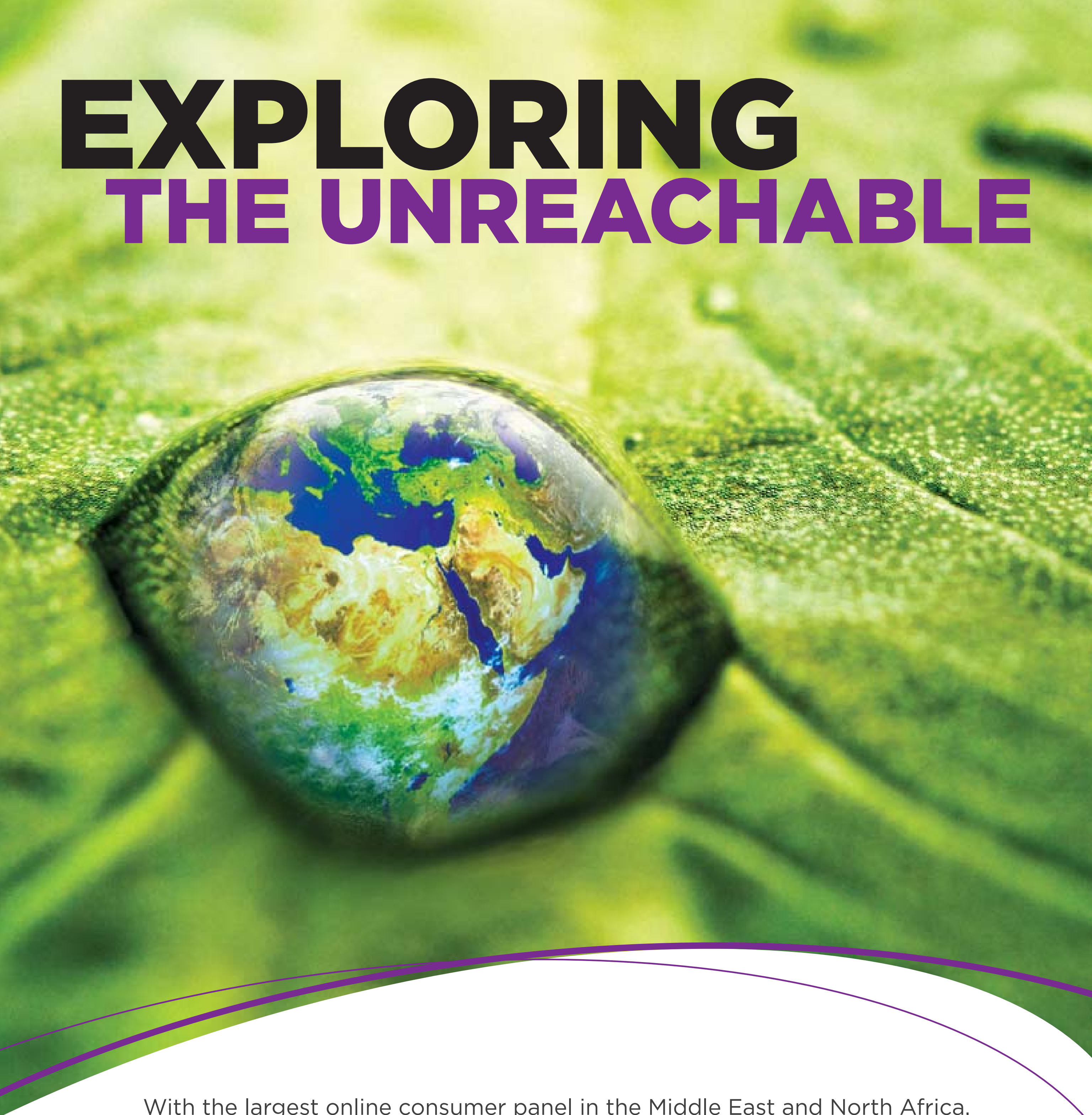
The industry is at a critical point in its evolution: in many countries, panel operators are facing declining response rates (generally due to panelist overuse and/or long or poor surveys). In other countries, Internet research is still new and novel, and as such response rates remain solid. In many of the mature markets, the combination of increased demand for panel and potentially challenged supply leads some to grow and refresh panels through any means available.

An effective strategy is for panel operators to employ strong metric-driven business rules and standardized processes to forecast then grow capacity, in a way that maintains consistency of their sampling frame. Without this attention to the fundamentals, the ability to replicate sample is questionable – even if consistent business practices and rules for sample usage are employed. When there's too much flux in panel sourcing, drawn samples and research results will fluctuate as well.

Interestingly, while the industry recognizes this in its discussions about river sampling, it doesn't hold panels up to this same level of scrutiny. Our hope is that as river sampling continues to gain momentum (a technique, we might add, that has been done successfully for nearly 15 years now), the industry will apply this same level of consideration to sourcing of all international panel and river creation. When that occurs, everyone will be better off; standardization produces consistency of sample sourcing and frame construction – elevating both the science of sampling and the quality of output.

3. Leveraging technology appropriately to improve standardization

Once practices and guidelines around standardization have been established, technology can be leveraged to ensure enforceability and


EXPLORING
THE UNREACHABLE

consistency. Standardized applications and methods deployed around sample recruitment and management have a big impact on quality. Companies that successfully design and deploy applications not only create process efficiencies, they also improve quality along the way.

That said, recalling that we must always apply a nuanced and local vs. global approach to sample management, it's important not to apply technologies and standardization carelessly, just for the sake of achieving efficiencies and consistency. For example, while common in developed nations, tracking IP addresses to improve quality can be problematic and potentially biasing in many regions. In countries where Internet connectivity is not yet pervasive, many people share connections in places such as Internet cafés and libraries. As such, employing a hard, one-size-fits-all block on IP address is unwise.

Conversely, there are a number of areas where certain technologies, consistently applied, will help improve quality. Among these: recruitment monitoring and throttling by source, to maintain a consistent sampling frame (for both river and panel); registration processing, to ensure respondent quality and validity; respondent profiling, to ensure consistency, validity and completeness; invitation response and survey monitoring, including tests for inherent quality.

Across the board, sound business rules and technology practices will help create scalable global sampling and research. Expertise in applying technology optimally - both globally and locally - is critical. For instance, in the IP-tracking example, decision-making and expectations for chief privacy officers are clearly elevated for global panel operators. In such areas, regional differences must be taken into account when establishing practices; in many European countries, IP tracking has legal implications and restrictions. It is important to fully understand and appreciate these differences within the scope of technology deployment and in any quality initiative globally.

4. Engaging global survey takers through a variety of methods

Even when successfully identifying global and local needs, then applying standards and technology to ensure best practices, an organization's efforts can be meaningless if it doesn't appropriately engage its audience in an ongoing manner. A number of considerations here can affect the research itself, as well as the long-term health and viability of the online samples.

First and foremost, it's vital that not all research be done online. Especially in lesser-developed nations, there's still a need for mixed-mode data collection (including face-to-face) when attempting to reach a broad cross-section of the population. If online capabilities aren't a fit for the research objectives, force-fitting the method does a huge disservice to both respondents and clients. When online sampling alone is not sufficient, seek offline supplements (or even replacements). In those situations, care should be taken to: complement the online research, by adding sample subsets not readily available online; understand potential sampling and methods differences, and their implications for the results (e.g., conducting a portion online and conducting a portion with an interviewer); and consult with clients on options (and implications) to arrive at the best solution.

Beyond this primary consideration, other factors weigh on maximum engagement:

Communications with respondents. These obviously vary due to language, but cultural norms must be considered as well. This is where local or regional expertise is most relevant. Word-for-word translations are generally problematic, creating unknown and unintended consequences, which often affect results.

Survey designs. To be engaging, survey topics, length and on-screen presentations require review on a country-by-country basis. Global studies should be carefully designed, factoring in language (including regional dialects), regional sensitivities, cultural implications and characteristics of available respondents. Likewise, prevailing practices around desktop (or mobile) technology must be considered - this is more important globally than in the U.S. Surveys may need to be constructed for lowest-common denominator technology usage among participants.

Motivation for participation. Respondents participate in research for a host of reasons: curiosity/interest, altruism and rewards, to cite just a few. Whatever the incentive, the objective is to complete the highest percentage of a drawn sample, while providing nominal gratuities that attract without biasing. As such, rewards for participation should be consistent (but not necessarily consistent on a monetary basis) to obtain the best data. If significant differences exist in panels or methods, datasets with vastly different characteristics may result, thereby hindering cross-country comparisons.

Maintaining a high level of engagement is both art and science, requiring high degrees of knowledge and experience. This effort also requires that sample providers, research agencies and end clients work in concert to make the right choices for any particular study, as well as for the sample sources and their participants, in the long run. While somewhat daunting, successful engagement is key to delivering high-value research now and in the future.

Aligning multiple players

Building and nurturing high-quality global sample sources involves diligence, thoughtfulness and an aggregation of regional experiences. It's a process of orchestration, of aligning multiple players in concert, including interaction with high-quality surveys that produce solid research results. This complex task is ongoing, as Internet adoption continues to evolve around the globe. Here, collective intelligence leads us to the best outcomes. As such, it is essential that, as an industry, we be continually vigilant to expand expertise and knowledge. In doing so, we best serve clients, protect global research assets and deliver accurate and actionable research. | Q

online research

Make 'em an offer they can't refuse

Using research to reduce e-shopping abandonment rates

By Kimberly Struyk

The objective for e-commerce Web sites is always the same: drive sales and revenue. Yet, e-store abandonment rates remain at 90 percent. Naturally, when visitors are not convinced to hit the purchase button during their session this raises site abandonment rates and lowers sales and revenue numbers. When speaking about abandonment rates - a critical metric - there are often misconceptions that require clarification. The reasons behind abandonment are not always due to site usability, as might typically be anticipated.

Extensive research reveals that abandonment is broken down into six key drivers: consumer condition, consumer behavior, merchandizing shortfalls, business rules, site mechanics and, lastly, pain points within the shopping process.

Further, there are varying degrees of persuasion needed to recapture the sale. By uncovering the true reasons behind abandonment, we can build best practices for transactional Web sites and also foster the emergence of new strategies. This information is derived from the behaviors that can be changed within each point of the conversion funnel and can be adapted as a business model across all transactional Web sites. Through observations about the change in consumer behavior during the online shopping experience, a "re-marketing research" model is born, one that focuses on the rationale behind, reaction to and recapture of abandonment.

Take several actions

Thinking about today's online shopping environment, consumers can take several actions within the online setting. They can shop directly on brand Web sites; visit competitive Web sites or aggregator sites (i.e., Amazon.com); or seek input from consumer opinion sites through reading blogs or by obtaining recommendations from friends on Facebook. We can go on and on about strategies used for online shopping, but the important fact is that a brand must stand out when it has the customers' attention (the span of which is getting shorter and shorter).

The research process starts with assessing why consumers are coming to the site and identifying improvements they would like to see when visiting. Uncovering visitor objections lets the site react and rectify the situation but most CRM programs do this by sending an e-mail to the consumer - resulting in a delay between

snapshot

By asking potential customers why they are leaving an e-commerce site, we can better understand reasons for shopping-cart abandonment and also give them a reason to stay and purchase.

Editor's note: Kimberly Struyk is director of client service at CRM Metrix, a Secaucus, N.J., research firm. She can be reached at 201-617-8181 or at kstruyk@crmmetrix.com. To view this article online, enter article ID 20110105 at quirks.com/articles.

the conversation linking the brand and the customer. As a result, the response may become irrelevant, especially if the shopper already purchased elsewhere. To keep up with the pace of Internet shopping behaviors while greatly increasing the likelihood to change the mind of a consumer, the "reaction phase" approach uses research to handle the reaction to consumer opposition in real-time.

During the reaction phase, the results from the rationale phase (insights related to abandonment) are examined and then reacted upon by the research system. This immediate reaction phase is what allows the brand to rectify the situation by redirecting the sale toward completion. Recalling that this model is built upon six core drivers of abandonment (with usability being the least likely to drive visitors away), in most cases there are three common strategies all sites should know about and build best practices around:

1. Be sure to assist with comparison shopping.
2. Show the price up front as soon as possible.
3. Always manage the product discontinuation process.

Best practice #1: Assist with comparison shopping

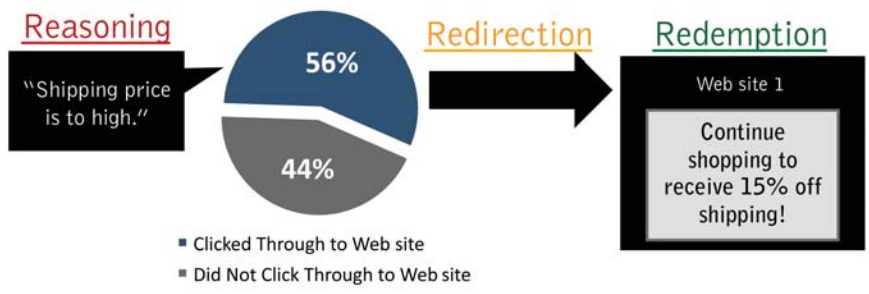
Assisting with comparison shopping is the common dominator across all Web sites, meaning it is an applicable feature needed for both transactional and non-transactional Web sites. Moreover, the evidence shows that visitors use the Web for research first and foremost. With that said, think about the first thing visitors typically do when conducting research for products. They most likely compare and contrast everything about the product or service (price, specifications and alternatives). This suggests that visitors will often find themselves left switching back and forth from site to site.

With visitors looking to compare and contrast so often, there is a basic need still not being met during the Web site experience. The comparison is often accomplished by using a content aggregator site or another tactic (i.e., writing on paper). While keeping in mind any potential legal concerns, sites should attempt to provide a comparative view for visitors. Implementing a meaningful compare-and-contrast feature assures that brand differentiation is clearly on display for all, thereby undoing any confusion with alternatives. Without the ability to compare, visitors will be toggling back and forth between your brand and your competition.

Best practice #2: Show the price up front as soon as possible

In tandem with comparison-shopping, e-store shoppers are most appreciative of having products linked with pricing, avoiding excessive clicks. Leading by example, e-commerce giant Amazon.com always shows the price point up front for fast and easy decision-making, which should be goal of all e-stores. Those who abandon deep within the shopping cart process are often just checking the price and/or shipping cost, which indicates that these visitors are inappropriately classified as abandoners

Figure 1: An Illustration of how The Re-Marketing Model Counteracts Abandonment and Increases Conversions



rather than researchers. Providing up-front communication about pricing is the avenue to a better customer relationship and decreased abandonment rates, but if this is not possible, then at least provide this information when the visitor is leaving the site.

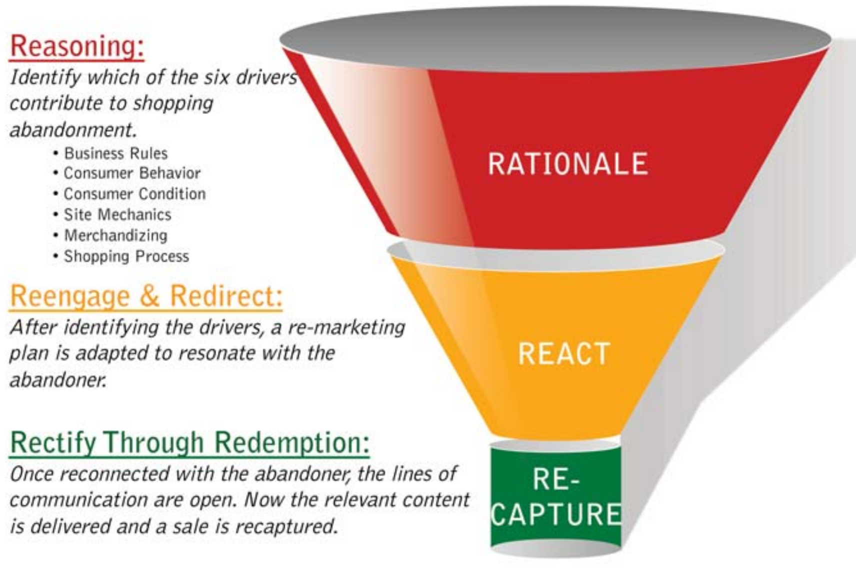
Best practice #3: Always manage and communicate product discontinuations

This best practice arises from the experiences of repeat purchasers and the most loyal customers, who are genuinely concerned when they visit the site and can't find their favorite products. The worst part is that sites typically hear of these troubles when the damage is already done and customers are frustrated by having to find a new product.

The best way to manage this situation is to clearly communicate product discontinuation with an immediate resolution. This means not only allowing the consumer into the loop about the change but notifying them in advance while also recommending a product replacement along with the benefits and description of the new product. Keep in mind that product discontinuation is a direct loss of revenue because visitors can no longer purchase these products, which usually leads to site defection due to distrust that forms (their distrust about a new product is low, but there is general distrust that the new product may also become discontinued). This communication is especially effective because it ensures loyalists are able to make alternative plans. Further, once a replacement item is suggested to the shopper, their usage set expands, potentially making them aware of products or brands they had not previously considered.

These best practices, if not housed directly on the site experience, can be implemented under a re-marketing strategy that is part of the reactionary phase of the research and triggers as soon as visitors abandon the site. We

Figure 2: The Re-Marketing Research Model



will discuss this further below.

Lead to more conversions

Now that a few best practices are laid out, it is easy to see how addressing these common threads will lead to more conversions. However, the key here is that reacting to the research insights in real time can lead to a dramatic increase in conversions.

Typically, abandoners choose to leave the site to comparison-shop and seek cheaper shipping costs. Under the re-marketing strategy, upon learning the reasons behind abandonment via research, the Web site is prepared with a counter-approach to give the shopper the information they are looking for as they are leaving the site. As the abandoner leaves, the site will understand that is the reason for leaving and immediately present the abandoner with a discounted shopping offer and ask them to return to the site to complete the purchase, ultimately recapturing their attention. If the abandoner is interested in redeeming the offer presented to them upon leaving the site, they will be automatically redirected back on to the appropriate landing page of the Web site.

This brings the research insights to life and redirects the negative feelings in a more positive manner, while still offering a second chance at purchase. Consumers are often forgiving, with stats showing that 56 percent of the time abandoners do agree to be redirected back onto the site to reconsider their purchase through this type of communication and/or redemption process.

Again, this has proven successful 56 percent of the time (Figure 1) and often leads to thousands in extra revenue from what had otherwise been lost conversions. When assessing the three outlined best practices, the research brings forth examples of missing pieces of information (content) during the visit session that easily fit into the criteria for instant personalization and optimization.

Find the barriers

To combat market conditions, it is important to find the barriers that hinder visitors from hitting the purchase button. This is done during the rationale phase of the research, but is exactly where most research stops. It is the site's responsibility to take all of these factors behind abandonment into consideration and continue to educate the consumer along the purchase decision path. But there are always two sides to the story. While listening is the first step, having an immediate reaction is the most proactive approach. In other words, use the research tool itself as part of a re-marketing strategy.

Looking back at the three outlined best practices, content is typically missing from the purchase equation. In some cases there is a need to state the price, while in others product suggestions, replacements and explanations could solve the problem. The investment for making these slight messaging or content changes is typically small, but it can take time to get them implemented. In the short- to long-term, bringing the research alive within the reaction stage of the model saves both costs and time but also recaptures customers. Again, this type of personalization and optimization is gleaned through the re-marketing research model (Figure 2).

Build trust

The research points to the problem and solution from both perspectives: the consumer outcome and the brand outcome. These suggestions play into the psychology of the consumer (consumer outcome), helping to build trust, familiarity and confidence while reducing end-user frustration. The brand outcome is threefold: better customer understanding, decreased abandonment and increased revenue.

The key takeaway is that all shopping abandonment drivers are often intertwined and one has some result or impact on the next. Therefore, learning which shopping abandonment driver is at the apex of the purchase decision and then building re-marketing strategies in tandem with these considerations will help increase conversions. This also proves that researchers think from both a research and marketing perspective, making them most fit to advise clients' business decisions and goals. | Q

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Investing in success

A process for improving packaging research ROI

By Scott Young

How can we get better at packaging? This is an increasingly common question, as senior marketers have come to recognize the power of the containers that envelop their products. It's also a question with many valid answers, as there are several potential paths to improvement (finding the right design partners, investing in innovation, elevating design within the organization, etc.).

However, it is clear that effective packaging research is a critical part of the equation. The right information and insights not only prevent major mistakes, they can (and should) also focus resources and improve return-on-investment (ROI) from packaging innovation and redesign. With that thought in mind, this article shares several best practices for using research to improve packaging at an organizational level, across brands, categories and countries. It also cites examples of how leading companies are creating competitive advantage through packaging research.

Best practice #1: Validating

The road to better packaging actually starts at the end, with the research that it is done just before formal go-ahead decisions. This final step, often termed validation or qualification, is realistically when the most research takes place - and it's the point in the process where companies are most likely to drive consistency (in methodology, in sampling, in decision criteria, etc.).

And consistency is indeed a primary consideration. If a company applies the same core methodologies and metrics across studies, the benefits go well beyond the ability to build robust databases and norms. Even more importantly, marketers, designers and researchers can begin to build a common language around packaging. When they speak of shelf impact, for example, they all know what it means, how it is measured - and what success looks like. Conversely, when a company uses varying methods for different studies or countries, it loses this understanding - and the ability to systematically measure and improve on an organizational level.

So which validation process should be used? This topic merits an article unto itself - and the intent here is not to compare or recommend specific methodologies. However, we can suggest three underlying principles to look

snapshot

The author explains how companies can maximize their investments in packaging research by following five best practices: validating, screening, benchmarking, innovating and integrating.

Editor's note: Scott Young is president of Perception Research Services International, Fort Lee, N.J. He can be reached at 201-346-1600 or at syoung@prsresearch.com. To view this article online, enter article ID 20110106 at quirks.com/articles.


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for in a global validation system:

- It should center upon quantitative multi-cell monadic studies, which simulate the introduction of new packaging vs. competition (rather than side-by-side comparisons of alternative designs for the same brand).
- It should start at the shelf, with accurate measures of shelf visibility, shopability and purchase (as these on-shelf measures have been validated to be most predictive of in-market performance).
- It should ensure high-quality stimuli that accurately reflect both the shelf and individual packages (as any packaging study is only as valid as the quality of what shoppers see and react to).

While these points may seem intuitive, they have major implications in terms of methodology. For example, our experience suggests that shelf sets need to be at least 75 to 80 percent of actual size to gather valid measures - and that physical packs are needed to accurately assess changes in packaging structure. Thus, to get accurate findings, companies do need to invest in both stimuli and more robust methodologies (typically, in-person interviewing).

Finally, in terms of packaging validation, there are two important factors that often separate the great companies from the good:

The first is implementation and follow-through! Many companies have best practices in place but lack a protocol for determining which packaging changes or decisions require full on-shelf validation. Thus, some brands, projects or even countries cut corners and "avoid the system" to save time or money. The best organizations couple a consistent validation process with a project classification system (and enforcement process) so the best practices are followed.

In addition, the best companies apply the same rigor and discipline (of on-shelf testing) to new products, to ensure that they break through shelf clutter, convey point-of-difference and drive trial. Other companies apply best practices only to re-stages, despite the fact that effective packaging (and shelf visibility, in particular) is absolutely critical to new product success.

Best practice #2: Screening

Once companies have a consistent validation process in place, their focus often turns to success rates. For example, what percentage of new designs tested meet action standards? What percent win vs. current packaging? Typically, this figure hovers close to 50 percent, which reflects that it is indeed difficult to drive wins on-shelf. However, it's definitely possible to improve this success rate by changing the screening process used to determine which designs go into validation studies.

While screening approaches vary widely, the commonality is that they generally rely upon side-by-side comparisons of designs ("beauty contests"), which lead shoppers to overemphasize aesthetics - and to

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overstate differences among options. As a result, marketing and design teams regularly emerge thinking that they have hit home runs, only to find out too late that their new packaging is not really making a difference at the shelf.

To make screening research more predictive of success, the key is to ensure that it emphasizes the same key metrics as validation studies. Most importantly, this involves incorporating the shelf at the earlier stage, to gauge if a new packaging system is likely to significantly impact visibility or shopability – or if a new product is even noticed within shelf clutter. Often, even 20-30 in-depth interviews (using physical or large two-dimensional or virtual shelves) can provide greater insights than hundreds of interviews lacking this context. It's also valuable to get a better sense of the first few seconds of packaging communication, through behavioral approaches such as pack viewing patterns and neuroscience measures. These tools can help make the screening process less aesthetically-driven – and more successful in identifying approaches that will break through, connect emotionally and ultimately succeed in the store.

To drive this transformation, several companies have developed global networks of retail learning centers. We've found that "mini-stores" provide an excellent context for qualitative screening studies, as they bring shoppers (and new packaging concepts) into the aisle. Already, we have seen their impact in helping companies recognize when they are "talking to themselves" (through very incremental design changes) and to test a wider range of design options.

Best practice #3: Benchmarking

In addition to rethinking screening, another path to success is to invest in the right packaging initiatives – and to set appropriate objectives and action standards. Yet while nearly all companies invest significantly in developing and validating new systems, remarkably few have processes in place for deciding when to make packaging changes – or for determining specific redesign objectives. Instead, restages typically come in response to competitive changes and/or declining sales – or perhaps they are driven by new advertising and/or a new brand manager. Nearly always, they are rooted in opinion/intuition about what needs to be "fixed," which may be misguided. The problem is that the research (and insight) often comes at the end of the process, after a great deal of time and energy has been spent solving the wrong problem – or perhaps even redesigning the wrong brand.

An effective solution lies in consistently assessing (or benchmarking) current packaging at the outset of redesign efforts, relative to competition and historical norms. This process, which we call package baseline, is primarily a matter of moving the control cell (from an eventual validation study) up in the project timeline, so that the learning can be used to refine design objectives and inform action standards. Often, we also include an additional name-only cell to uncover visual equities (via drawing exercises) and emotional triggers (via neuroscience) – and to gauge the contribution of current packaging to brand imagery. (Are we selling because of – or in spite of – our packaging?)

A few forward-thinking organizations have actually taken the baseline process a step further, by instituting annual or biannual audits of current packaging vs. competition. These audits help to allocate resources and investments across the company, by uncovering which brands are most in need of packaging changes. They also serve as a starting point for these redesign efforts by identifying areas of competitive disadvantage or weakness, which often translate to specific and focused redesign objectives.

Best practice #4: Innovating

Along with preventing mistakes and increasing the likelihood of successful changes, packaging research should also help drive breakthrough innovations.

And the reality is that revolutionary, game-changing new concepts rarely come from studying current or competitive packaging. Instead, they are typically rooted in addressing major barriers and/or uncovering unmet (and often unarticulated) consumer needs.

To identify these issues and opportunities, it's best to start at the store. Walking the aisles quickly reveals that packaging often doesn't appear as intended, due to the effects of shelving, signage or merchandising (compromising legibility, obstructing branding, etc.) – or the packaging structure itself (bags knocked over, packages not facing forward, stock-outs, etc.). These retail realities serve as barriers to purchase which directly impact the bottom line. And while these challenges can't be fully eliminated, they can be mitigated through effective graphic design and investment in better packaging structures and merchandising systems. For this to happen, however, there needs to be a consistent process for visiting stores, classifying these issues and feeding this information to marketing, design and R&D teams. Several leading companies have recently begun doing these "retail reality-checks" in a disciplined way, as an input to design and innovation briefs. This process helps ensure that packaging investments solve major problems on the shelf.

The home is clearly another valuable source of big ideas. Specifically, by documenting the packaging life cycle (from purchase, through transport, storage, usage and disposal), companies can often identify opportunities and uncover unmet needs. Often, we find that the biggest wins come from driving increased consumption by making packaging more visible in the home – and/or by tailoring packaging more directly to specific usage occasions. Indeed, some of the most dramatic and profitable breakthroughs have come from simple ideas (such as fridge packs and 100-calorie packs) rooted in in-home ethnography. Thus, a fourth best practice is to develop a consistent process for reaching out to the store and the home as the most likely sources of breakthrough innovation.

Best practice #5: Integrating

Finally, the best companies recognize that packaging is one part of a larger effort to win at retail. To put it another way, they know that it is difficult to create great packaging without an underlying understanding of the shopper – and of how packaging interacts with shelving, merchandising and other in-store variables.

To this end, more companies are breaking down the silos within their organizations that separate packaging research and shopper insights. On one level, they are conducting in-store observational research at the outset of redesigns to ensure that the shopper and the retail insights are incorporated within design briefs. At our firm, this has involved taking eye-tracking technology to the store, to document aisle navigation, interaction between packaging and signage and the purchase decision process.

In addition, marketers are increasingly evaluating packaging in a broader context – and/or using packaging studies to assess alternative planograms or point-of-sale merchandising strategies. We have used virtual shopping tools to assess packaging in the aisle and in the context of end caps, shelf talkers and alternative shelving adjacencies. In some cases, this has allowed us to isolate the added-value and potential ROI from in-store signage. In others, we've found that alternative shelf placements have had an enormous impact on visibility and purchase/trial of new products.

Thus, on an organizational level, a fifth best practice is to build bridges between packaging and point-of-sale/shopper research, in order to improve packaging, to benefit from cost efficiencies – and to gain a more holistic understanding of how to win at retail.

Can make a difference

As companies recognize the power and importance of packaging, they will also come to realize that it is not easy to systematically get better across brands, business and regions. However, market research leaders can make a difference by instilling the right processes and ensuring that their organizations consistently:

- Identify primary issues and opportunities – through store-based research and in-home ethnography.
- Know the strengths and limitations of their current packaging – via benchmarking or baseline research.
- Allocate resources toward the right brands and projects – through auditing and cross-study analysis.
- Properly screen and validate new concepts – by focusing upon on-shelf performance.

Companies that incorporate these best practices are likely to dramatically improve their odds of packaging success. They are less likely to divert energy on the wrong efforts – and/or to end up "talking to themselves" with modest packaging changes that don't make a difference on shelf. Ultimately, the investment in consistent (and proactive) packaging research processes will pay off in a stronger ROI. | Q brand research

A logical succession

Setting research action standards to guide brand hierarchy decisions

By Kevin Waters

Master brand or co-brand? Which brand should be emphasized? What type of endorsement brand strategy? Decisions, decisions, decisions.

Knowledge - and anticipation - of a brand's portfolio, and the branding hierarchies/architectures used within the portfolio, is as important today as ever before. Deciding how to represent the portfolio from a brand architecture standpoint is becoming increasingly challenging. Corporations continually jockey to strengthen or tweak their portfolios, be it through acquisitions, joint ventures, licensing deals, extensions of current brands and/or development of entirely new brands. Presumably, all of these deals and decisions are framed around a strategic intent - not only for the brand in question but the broader portfolio (and corporate context) as well. Failure to think along these lines can, and often does, lead to confusing, and in some cases contradictory, messaging.

ROI pressures and the desire to create efficiencies and leverage adjacent brand strengths often lead to decisions of marrying different brands via some sort of brand hierarchy/architecture structure. In these situations, the premise is generally clear: that one of the married brands could benefit itself, the other brand or both brands via some sort of equity flow (i.e., the transference of desired value, imagery or perceptions of one brand to another, in the process achieving the desired or declared strategy for the newly-formed aggregate brand entity). Addressing these options and answering these questions, however, is not always as straightforward as the initial intent, nor as forward-looking as it could be.

For clarity, it's worth a brief review of brand hierarchies and architectures. While many options and variations exist, and seem to be growing every day, for the purposes of this article, these can be distilled down to the three basic configurations shown in Figure 1.

Guide the decision-making process

It should come as no surprise that research among target audiences is often relied upon to guide the decision-making process for brand hierarchy initiatives. The underlying goal of such projects is to arbitrate among (sometimes) several different options and choose the "best" option to move forward with. Additionally, and related, oftentimes multiple agendas cloud the overall research task at hand, and agreeing on

snapshot

Companies seeking clarity regarding their brand portfolio should turn to research to answer critical questions, the author argues.

Editor's note: Kevin Waters is a San Francisco-based researcher. He can be reached at 925-964-0359 or at kmwaters@comcast.net. To view this article online, enter article ID 20110107 at quirks.com/articles.


3.121005
10.5132468
START
5.02315
STATISTICS
DATA CENTRAL
GO TO MARKET

Figure 1: Example Brand Hierarchy Combinations

Hierarchy Combination	Typical Configuration	Example
Master Brand Strategy	*Brand A* Brand B	*Microsoft* Office
Dual/Co-Brand Strategy	Brand A Brand B	FedExKinko's
Endorsement Brand Strategy	Brand A *From the makers of Brand B*	Select 55 *From Budweiser*

what constitutes "best" becomes an onerous project in and of itself. Further complicating the issue is the tendency to resort to a "test all options" mentality, meaning that a larger consideration set exists from which to draw a conclusion.

Unfortunately, some of the strategic intent around certain brand options is not completely shared, known or even agreed upon at the start of these initiatives. As such, the eventual research output can be prone to decisions being made that often do not align with current and longer-term strategy for the brand and the broader portfolio. Much of this stems from failure to agree upon or establish appropriate action standards at the outset, as well as insufficient information-gathering before the investment in research.

Conducting stakeholder interviews

While timing and budgets do not always allow, and while certainly not a novel idea, the practice of conducting stakeholder interviews prior to the onset of research, and preferably before decisions on overall research design and scope are made, is strongly encouraged.

Stakeholder interviews, in this case, are brief discussions with key personnel across various departments, all of whom are involved in the branding hierarchy or related business decisions. Augmenting this task with some review of the current brand portfolio and recent, plus planned, branding decisions is also wise, simply to understand how brand combinations have been created to reflect the broad strategic initiatives.

Not only does such information assist in important methodological considerations for the research (particularly in regards to what should be included versus what is not needed as options to assess) but it also provides valuable insights to help in post-research interpretation and overall brand structure recommendations.

The following is a partial list of some of the more typical questions that should be asked at this stage:

What is the proposed brand hierarchy supposed to communicate to the target audience(s)?

Is either of the brands being tasked with transferring equity or some perceptual imagery/association to the other brand? If so, which brand, and what desired imagery or associations are being transferred?

Does the corporation tend to operate with multiple, distinct brands or are brands all linked to some common corporate or master brand?

Is either of the brands a candidate to become a stand-alone brand, without any connection to a corporate or related brand?

Is either of the brands being considered for further brand or line extension?

Responses to these questions become important in helping to determine the overall research objectives and also in deciding what to include/exclude in the actual research survey.

As an example, let's consider a question pertaining to whether a brand is being groomed to become a platform for a new family of brands - perhaps an entry into a different market segment for the corporation. Let's assume this is Brand A, as depicted in the examples in Figure 1. If the answer to this example question is yes (i.e., Brand A becoming an eventual new platform brand), it is probably most efficient to consider different options of endorsement brands and/or dual/co-brands as research stimuli, rather than master brand examples, as the former configurations tend to emphasize a specific brand that could eventually stand alone and become a platform for further extensions (i.e., FedEx Kinko's [now FedEx Office] or Select 55 in our example from Figure 1). Based purely on this objective, while including different examples or versions of the master brand option might be nice-to-know, such information really does not support the stated objective and thus leads to the risk of confusing data, and also conclusions, for decision-making (not to mention potential for politically-charged discussions). Obtaining information through the use of pre-research discussion a la stakeholder interviews can help focus the stimuli needed for research and eventual answering of the overall research questions and eliminates the potential for contradictory, misleading or wasteful data and related decisions.

The action standard

Agreeing on what to assess in the proposed research, and making sure this aligns with stated research objectives, is a key initial step in brand hierarchy initiatives. A second main consideration is agreement on the actual survey questions to which a decision will be linked and rendered. This is commonly referred to as the action standard.

A decision on what the action standard will be, or which metrics to use, can take many directions. Unfortunately, one common tendency is to resort to "what's been used in the past," even if the current initiative objective differs from other past research programs. A good example here is the selection of some hedonic metric, such as overall preference, as the survey question to use in basing your decisions. While an important indicator of success (i.e., all marketers want their product/service to be preferred by their target audiences), this should not be considered as a primary action standard determinant in brand hierarchy initiatives/decisions.

There are a couple of reasons for this. One, focusing purely on a preference measure prohibits the marketer/researcher from understanding what the brand combination communicates from an image/perception perspective, thus leading to little (or no) information on overall fit/alignment with desired brand strategy. And two, preference measures are often influenced by other items, one of which is overall awareness (i.e., people gravitating to the familiar and tending to prefer what they are already used to or know about as opposed to something specific about the desired direction of the brand). This situation also tends to provide a false, or limited, sense of performance for the proposed brand hierarchy options by failing to account for the desired direction of the brand combination from an imagery standpoint.

Again, while the above can be important success indicators, they are not always the best or most appropriate action standards for brand hierarchy initiatives. There is no arguing that such questions will always provide an indication of which option won, even though that "winner" may not necessarily coincide with strategic direction for the brand from an image/perception point of view. Additionally, as brand hierarchy initiatives continue to be investigated, repeated use of preference as an action standard can lead to a brand portfolio that is jumbled with respect to strategy. You'd essentially have a group of brands/brand representations that all share a common thread of being "preferred" but likely differ considerably in, or do not align at all with, stated strategic direction.

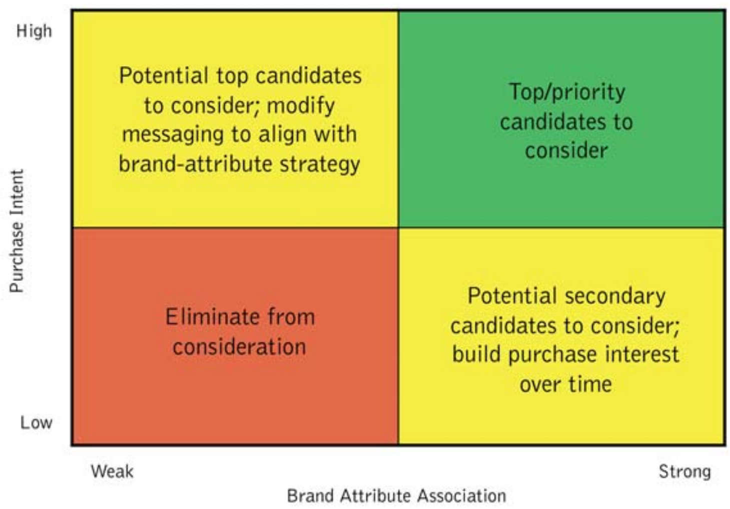
Purchase intent

A related research action standard candidate, and probably the most turned-to option regardless of the initiative, is purchase intent, or some sort of scalar or choice-based question that gets at overall interest in purchasing a product or service. There's no argument that, at the end of the day, marketers market their product and build the brand to persuade eventual purchase of it. In this context, it's difficult to debate the merits of purchase intent as a de facto metric for decision-making.

However, and at the risk of generating debate, there are arguments against purchase interest as the main action standard in brand hierarchy initiatives. Simply put, purchase interest metrics are often very highly correlated with preference data and thus fall victim to some of the same cons or issues mentioned above.

A more desirable option is to include purchase interest as one part of the action standard equation but to augment it with some form of brand image/attribute measures specific to the brand/branding initiative. This allows for inclusion of a key, and traditional and standard, measure of purchase but also for some custom measure of perceptions generated by the proposed brand combinations/hierarchies. It also provides for a more robust

Figure 2: Two-Dimensional Quadrant Map to Prioritize Brand Hierarchy Decisions



analysis of the data and simplification of decision making once results have been analyzed.

Figure 2, which utilizes a simple-yet-powerful quadrant map to depict performance of different brand hierarchy options across two dimensions, is based on the augmented action standard example described above. The y-axis (vertical dimension) shows the overall strength of purchase interest for the different brand options under consideration. The x-axis (horizontal dimension) brings in performance of the different brand options on key strategic imagery attributes defined for the brand or specific to that initiative.

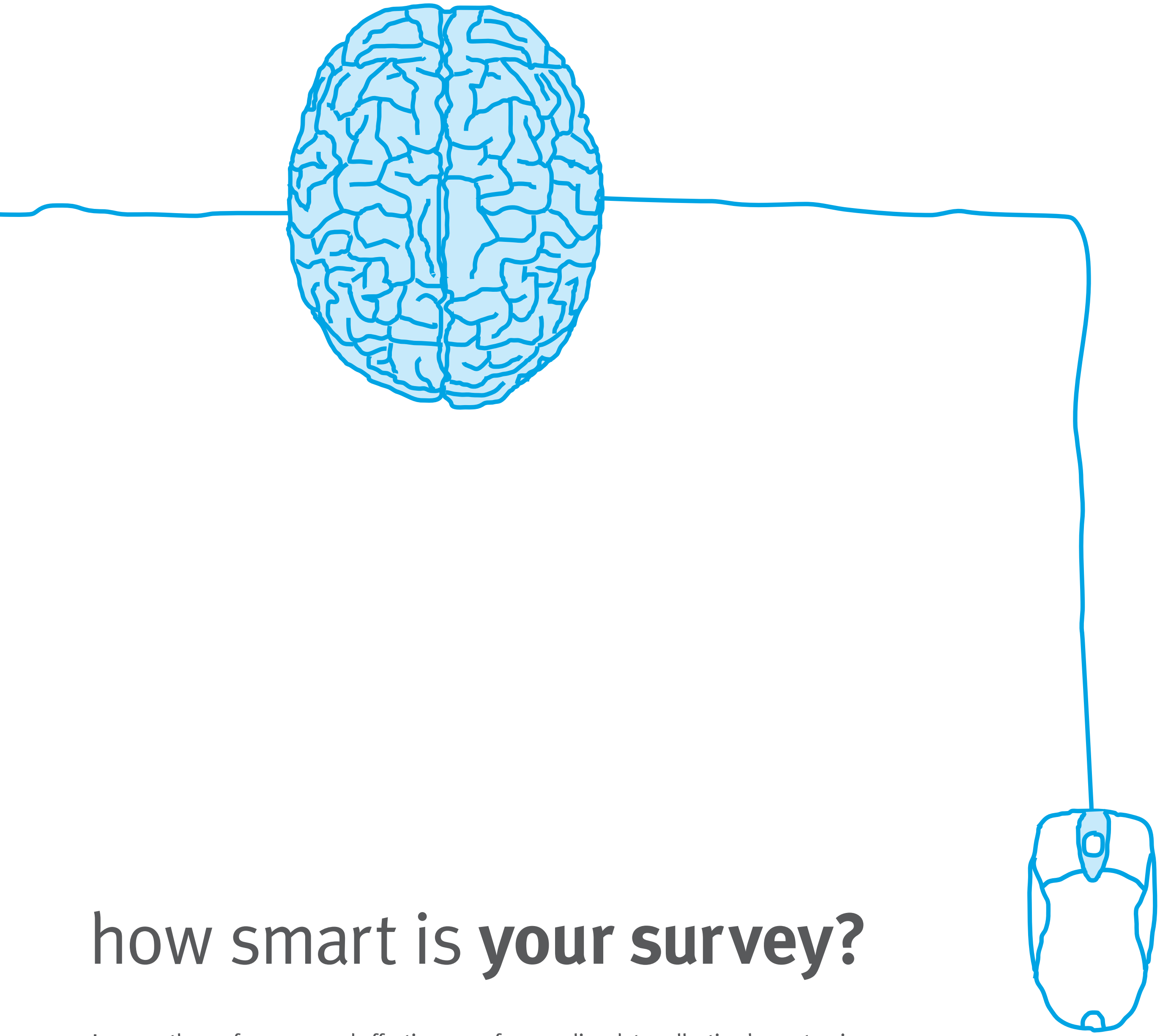
These imagery attributes can take the form of an aggregate set of measures to reflect an overall profile for the brand (e.g., the average of five or six attributes) or it might consist of a single critical attribute or pair of attributes. The flexibility in the subsequent analysis and synthesis of the data from this type of design is very beneficial to the researcher and it is also an important criterion to agree upon prior to the initiation of such research (i.e., in the stakeholder interview stage, for example).

Interpretation of the map is straightforward, thus providing benefits for management presentations and ultimate decisions. A goal in any brand-related program is to ascertain what the brand/brand entity communicates (i.e., is it in line with declared strategy?) and whether it prompts positive purchase intentions (i.e., does the audience claim they will buy it?). Brands or brand hierarchy options that deliver in both areas (or dimensions) stand a better chance of achieving success in the marketplace and also in the development/management of a cohesive brand portfolio for the corporation. Options falling in the upper-right-hand quadrant of the map (high purchase intent, strong brand image association) achieve these objectives and are, therefore, top priority candidates to consider for implementation. Those falling in the opposite quadrant (the lower-left) fail to generate adequate purchase interest or desirable image perceptions and should be excluded from the consideration set.

The remaining two quadrants require additional assessment. Those in the upper-left (high purchase intent, weak brand image) should be investigated as potential candidates in that they deliver on one key dimension (claimed interest in purchasing) but lack sufficient association with key strategic attributes. Direction for these candidates could include reviewing the analysis one attribute at a time to see if a specific attribute, or a few, are failing to achieve desired communication goals. This pinpoints areas where the marketer could adjust the mix to improve perception of the attributes in question, perhaps by altering the visual identity of the proposed brand combination to improve and deliver on desired perceptions. The final quadrant in Figure 2 (lower-right; strong brand image, low purchase intent) is also delivering on "half" of the action standard by communicating desired brand imagery. Depending on the purchase interest strength, options falling in this area could be candidates to consider since they fulfill the desired brand declaration which, if the strategy is sound and executed properly, should lead to eventual building of purchase interest (and sales) with time.

Without sacrificing the rigor

Branding and brand hierarchy decisions are complicated enough, and approaches to providing decision insights should be simple, without sacrificing the rigor in the decision-making process. The opinions and approach shared above form a proven method for creating clarity for such initiatives. By grounding the research with some basic a priori information-gathering and then supplementing that information with research approaches and syntheses that focus on key (dual) dimensions, marketers can more easily identify promising options that not only fit with desired strategy but also provide an ongoing process that will positively impact future development of the corporate brand portfolio. | Q



respondent cooperation

Pay it forward

How respect for respondents improves marketing research for all

By Bonnie Eisenfeld

If you have ever been contacted to be a respondent in a survey, you may have been eliminated because you were a market research professional. That's too bad because you have missed the eye-opening experience of being a respondent. If you weren't eliminated, you probably tried to be helpful and maybe it was a great experience. On the other hand, you may have found the process intrusive, frustrating and annoying.

The most common complaints that I hear about surveys are: the questions were confusing, the multiple choices available did not include the answer the respondent wanted to give and the interview seemed interminable and boring. People do not like receiving a telephone call at home in the middle of dinner and they most particularly do not like it when an interview takes longer than promised. If the caller said the questionnaire would take five minutes and it took 20 minutes, the respondent gets irritated and will probably refuse the next request to participate. Research faux pas such as these indicate a lack of respect for the respondent.

Respondents' value to the market research process is critical. They have the information and opinions we need. Without respondents, we would be out of business. According to a report by the National Science Foundation (NSF), response rates for surveys have been declining. People are increasingly refusing to participate in legitimate surveys. Some of the reasons for refusing include: more demands on their time; suspicion that a survey may be a sales pitch in disguise; daunting, long questionnaires; and increased volume of junk mail and spam. The NSF says, "The future of surveys as a reliable means to measure trends is in doubt."

To ensure that respondents continue to participate in the market research process, market researchers need to understand the process from the respondents' point of view and we need to show respect and appreciation.

snapshot

Without respondents, there would be no research. Bonnie Eisenfeld explains ways to make sure you keep their needs in mind during the interviewing process.

Combination of factors

Respondents who agree to participate in surveys are motivated by a combination of factors. They may participate because of interest in the topic, realization that their opinions are important, the opportunity to talk about themselves and their opinions, a desire to be helpful, the chance to voice their satisfaction or dissatisfaction and a chance to influ-

Editor's note: Bonnie Eisenfeld is a Philadelphia-based independent marketing research consultant. She can be reached at bwehrl@earthlink.net. To view this article online, enter article ID 20110108 at quirks.com/articles.

ence a product or service in some way. They may be curious about the topic or curious to know what their peers have to say. From a more self-serving perspective, respondents may believe that ultimately the findings will benefit them. Time availability is a big issue, but busy respondents will often make time if they are offered an incentive they value in return for their participation.

Researchers have the opportunity to demonstrate respect for respondents in at least four stages of the research process: creating the questionnaire, choosing the data collection method, recruiting respondents and follow-up communications. Here's how to do it right.

Design a questionnaire to allow respondents to express themselves.

Respondents want to express their thoughts and opinions, they really do. If a questionnaire containing tightly-constructed multiple-choice or scaled responses does not capture respondents' real thoughts, they feel frustrated. So even if your questionnaire is mostly closed-ended, you should allow for open-ended responses also.

Many times, the open-ended portion of the questionnaire yields the most important findings. I have worked on satisfaction surveys in which respondents rated a product or service high on numerical scales but responses to open-ended questions revealed many areas for improvement. If ratings are low, respondents' comments will enlighten you about their reasons, motivations and concerns - all helping you to gain insight. Allowing respondents to comment provides more learning - plus you are showing respect for their opinions.

Try to avoid questions that have long lists of multiple choices, as respondents will get bored and may terminate early. At best, their responses will be perfunctory and without thought.

Pre-test the questionnaire for logic and clarity and revise it until you have eliminated any confusing questions. Also test for how long the questionnaire takes to complete. It may look short on paper, but if you want thoughtful answers, you need to allow time for each respondent to think. Keep the questionnaire as short as possible to meet your research objectives. If you have a large number of objectives, consider splitting the research into two parts administered to two matched samples.

Choose a data collection method respondents will like.

Live interviews are most successful when they are based on short, open-ended, unstructured questionnaires, allowing respondents to express their thoughts and opinions fully and providing the opportunity for the interviewer to probe.

In a live interview, interviewers should be briefed thoroughly about the topic and sound interested in the responses. Interviewers should not be judgmental or defensive. To the extent possible, interviewers should stick to the time promised. In a good interview, respondents talk a lot and become interested in what they are saying; subsequently, the interview may run over the estimated time. Respondents usually don't mind overtime if they were excited about telling you their thoughts and feelings. Some respondents have told interviewers they have actually enjoyed the process.

Longer surveys with closed-end response choices can be self-administered effectively online. If you use a grid, the respondent should be able see the choices on one screen-page. Respondents are willing to spend more time online than on the phone and perceive online surveys to be convenient, easy and confidential.

Recruit respondents with their needs in mind.

Time is a valuable commodity to most people. Researchers should allow enough project time so that willing respondents can do the interview or complete a questionnaire when it's best for them. It is particularly important if you have a small sample to build in the time for multiple callbacks and referrals. The people you are targeting have jobs, families, obligations, meetings, hobbies, vacations and other parts of their lives that are more important to them than your research project. You are lucky if they take the time to respond to your questions.

To recruit respondents, create a pre-call communication message that includes a detailed explanation of the project, the purpose of the research, the importance of the selected respondents' participation and the type of organization sponsoring the study. It is customary to promise anonymity and confidentiality to respondents.

Offering an incentive shows respect for respondent's time even though they may not need the money, as in the case of highly-paid executives. In those instances, you can give them two options: get paid directly or have a check sent to a charitable organization. Affluent individuals will respond to incentives more frequently than one might guess. Offering to send a summary of findings will often motivate people to participate because they are interested in what their peers have to say.

Use a combination of channels of communication to recruit respondents - telephone, e-mail, fax, voicemail and yes, sometimes U.S. mail or courier. If you are sending a letter by mail or fax, use company letterhead and have the highest-level executive sign the letter. Make multiple contacts over a period of time at different times of day. If you are referred to a different person, start all over again with the communications process. These recruiting communications efforts take time and effort but they pay off in the end with more and better respondents.

If the project includes live interviews, interviewers should be available from early morning to late evening, covering multiple time zones and recruiters should schedule appointments with respondents to meet their time needs.

In B2B projects, be courteous to the administrative assistants who will often act as go-betweens for you with the target respondents. Persistence pays off. Business executives need to be convinced that you are interested in their specific participation and that their information and opinions are highly valued.

Respondents like knowing who is sponsoring the research, but often research objectives prevent revealing the sponsor. Sponsors may be named in certain cases. If you can reveal the sponsor without sacrificing objectivity, you will most likely get a higher response rate. A compromise is to promise to reveal the sponsor at the end of the interview. In cases where sponsors cannot be disclosed, a trusted market research company name is important.

Deliver what you promised. A researcher should take responsibility to give positive feedback and keep promises to every respondent every time. At the end of each interview or questionnaire completed, researchers should sincerely thank the respondent for the time spent. Verify the address for the incentive and tell the respondent when, realistically, to expect to receive it. Research companies should pay the incentive promptly, not two months later. Also, send the summary report promptly. If you promised confidentiality and anonymity, don't reveal respondents' names or individual responses to the client. If you promised to reveal the sponsor to the respondent, then reveal it.

Keeping promises and commitments and giving positive reinforcement leads to trust in your company name and trust in the market research industry as a whole. Doing things right on every project will help all researchers in the future. Doing things wrong will irritate respondents and make them less likely to participate in the future. Respondents who do not receive a prompt payment will be skeptical next time they are asked to participate in research. Respondents who were promised anonymity and confidentiality and later found that their names and responses were revealed to a sponsor will not believe future claims of anonymity and confidentiality.

Market researchers cannot control whether clients use the findings of a survey in strategies, decisions or actions. But you should be aware that when respondents have poured out their needs, wants and opinions in a survey about satisfaction or new-product development and think the findings were not used, they may be reluctant to invest their time again. So encourage sponsors of surveys to issue reports on survey findings to customers and to the public including information on how they used the findings to make improvements.

Understand the respondents' viewpoint

Instead of excluding market researchers from surveys even though they qualify as eligible on other characteristics, I recommend that we start including market researchers as respondents to help us understand the respondents' viewpoint. Walk in the respondents' shoes more often and you might not put so many bumps in their path. |Q

Survey Monitor

continued from p. 8

Asians, whereas increasing utility prices were Europeans' biggest concern. Recovery is back on track in Northwest Europe, while the recessionary mind-set lives on in Southern Europe. Nine of the top 10 most confident nations hail from the Asia-Pacific region.

After an upbeat start to 2010 with two consecutive quarters of increased optimism, global consumer confidence fell three points in September to an Index of 90. Consumer Confidence Index levels above and below a baseline of 100 indicate degrees of optimism and pessimism. The 90 Index mark reflects that consumers around the world were largely pessimistic about job prospects, personal finances and their ability to buy the things they want and need over the next year.

For many consumers, spending on non-essential goods was more restrained last year compared to the height of the global recession two years ago. Discretionary income reached an all-time low for many consumers in the third quarter, with 27 percent of Americans, 19 percent of Europeans, 17 percent of Middle Easterners/Africans and 16 percent of Latin Americans left with no spare cash after paying essential living expenses.

In addition to economic issues, many consumers in Asia and Europe grappled with additional concerns such as rising food and utility prices, which squeezed already-constrained family budgets. In Europe, increasing utility bills replaced the economy as the No. 1 concern over the next six months, and in Asia-Pacific, one in five consumers were most concerned about rising food prices, an increase of 13 points over the second quarter of 2010.

The economy remained the No. 1 concern for 27 percent of North Americans and worries about health jumped 5 percent. Health is now the No. 1 concern for 10 percent of respondents in North America. Among Latin Americans, consumers ranked work/life balance, job security, debt, crime and children's education ahead of the economy as the No. 1 concern. For more information visit www.nielsen.com.

Older workers use social networking for business but still have faith in traditional meetings

Professional behaviors and attitudes among different generations vary greatly, and it isn't only the difference between who's on LinkedIn and who's still using a Rolodex. On the whole, younger generations put less stock in in-person meetings and meetings in general, but they're not the ones rushing to collaborative technologies and social media to get the job done. Gen X workers - and not their younger Gen Y counterparts - make up the majority of those who use social networking for business, followed closely by Boomers ages 55+, according to a global study conducted by Forrester Research, Cambridge, Mass., on behalf of Citrix Online, a Santa Barbara, Calif., software company. The study asked information workers of all ages in the U.S., U.K., France, Germany and Australia about their business communication habits.

The study showed that older generations - not Gen Y - have a monopoly on technology use and social tools during the work day. Gen Y is least likely to share information via text message (26 percent of Gen Y vs. 47 percent of those 55+) and least likely to use videoconferencing, videochat and Webconferencing tools. Gen Y uses social networking the least frequently (40 percent of Gen Y workers who use social media for business do so daily vs. 50 percent of those 55+). Older Boomers have increased their business use of social media 79 percent in the past year. Use is on the rise overall, with 64 percent of those who employ social networking tools in business doing so more than the previous year. Videochat, team document-sharing sites and Web conferencing also experienced significant increases in usage, at 56 percent, 55 percent and 52 percent, respectively.

Social networking may help make work more efficient but the traditional office meeting is far from obsolete, despite widespread disenchantment with meetings. Eighty-four percent of all respondents have in-person meetings, although meetings often don't achieve their goals. Only 45 percent are very satisfied that planning meetings achieve the task at hand, and only 30 percent believe such meetings to be very efficient. Across all categories of meetings for designated tasks (e.g., review of documents, plan projects or initiatives, decision on a course of action, etc.), less than half of respondents believe those meetings are very efficient.

Additionally, the younger you are, the less you value meetings and pay attention during them. Gen Y is least likely to think meetings are efficient, and only 29 percent of Gen Y workers think meetings used to decide on a course of action are very efficient, compared to 45 percent of older Boomers. Gen Y is also least likely to pay attention in meetings, as barely half believe it's very important to do so in meetings to decide on a course of action.

In America, however, perhaps contrary to conventional wisdom, workers have more meetings but pay more attention instead of less. Ninety percent of Americans meet in person to communicate and build relationships, more than any other nationality. Of that 90 percent, 51 percent meet daily, compared to a mere 31 percent of French. Seventy-five percent of Americans believe it's very important to pay attention in meetings to decide on a course of action, compared to 50 percent of the French. For more information visit www.forrester.com.

Canada scored a coup in 2010 ranking of country-as-brand

The 2010 country brand rankings are in, and it takes more than a high GDP to get to the top - or stay there. In fact, the commerce and manufacturing meccas of the world are markedly absent from the highest-ranked countries. While many believe strong economic performance is vital to brand strength, it is not enough to guarantee a high world ranking. It is much more - a strong country brand should make peoples' lives better through safety, stability and political freedom.

New York research company FutureBrand's Country Brand Index annual study is a global quantitative research study with 3,400 international business and leisure travelers from 13 countries on five continents, qualified by in-depth expert focus groups that took place in 14 major metropolitan areas around the world. The strength of a country brand is determined by measures of awareness, familiarity, preference, consideration, advocacy and active decisions to visit. However, the most important factors that truly differentiate a nation's brand are its associations and attributes, which the study measures these in five dimensions: tourism; heritage and culture; value system; quality of life; and good for business.

The leading countries for 2010 country brands share some common features. They are all democratic; progressive; relatively politically and economically stable; and do business in English. As ever, there are rising and falling stars, but position is not the whole story. Themes emerged in 2010 that hint at future drivers of country brand strength, including the importance of value systems and the freedom of communications.

2010's weakest country brands struggled variously with political instability, security concerns, corruption, economic turmoil, natural disasters and high levels of state control, all of which confirm an unavoidable correlation between perceived brand strength and political, social and economic realities in the world's most challenged countries. As a group, these country brands performed poorly in the assessed dimensions of tourism and value system. But it is important to consider that low awareness remains a strong part of the problem for these country brands, rather than merely negative associations. The best country brands have strong sense of identity, developed over time and presented consistently across touchpoints, which is critical to brand success of any kind. Country brand strength is a nation's ultimate intangible asset and goes beyond its geographic size, financial performance or levels of awareness.

Rising from second to first place, brand Canada displaced the U.S. in a coup that mirrored its ice hockey gold-medal win at the Vancouver Winter Olympics. In fact, as host of the Games, Canada not only secured a record number of gold medals but delivered a successful event overall - a fact that must have helped its image as a safe, friendly, fun, world-class country. All things considered, it is perhaps not surprising that Canada enjoyed increased awareness and visitation scores this year. But paradoxically, while Canada performed consistently well across every country brand index measure, it failed to achieve the highest rank in any category - unlike its rival the U.S., which continued to dominate when it came to consideration and other scores.

The U.S. fell from the top spot in 2009 to fourth in 2010, showing that the Obama effect can work both ways. Just as its rise to the top spot in 2009 reflected global attention, hope and anticipation of change promised by the new administration, the U.S. suffered in parallel with the waning approval ratings of President Obama. This could indicate that brand U.S. was artificially stimulated by the charisma of an individual, masking some of the U.S.'s challenges in the wake of the global economic crisis. With unemployment nearing double figures and a slower-than-predicted recovery, the world's largest economy has also been affected by the Gulf of Mexico disaster and sustained criticism over foreign policy. Brand U.S., however, continues to communicate strong and desirable values in everything from popular culture and entertainment to food and retailing brands.

The economic crisis was also a powerful factor in country brand strength in 2010, but mainly for those that avoided it. The top three brands managed to escape the worst of the banking collapse and maintain relatively strong economies throughout 2010. Australia and New Zealand both enjoyed consecutive-quarter growth thanks in part to continuing demand for commodities like iron ore, timber and milk from China. Canada also showed strong performance among the G7 nations, being the last into recession and the first out, not least thanks to fiscal conservatism that helped it to avoid the sub-prime crisis. Other countries that fell in the rankings - notably the U.S. and the U.K. - have both suffered conspicuously as a result of high-risk ventures and the banking collapse.

Perhaps most interestingly in 2010, the top-20 performance of Sweden, Finland, Norway and Denmark revealed a strong emerging preference for brand Scandinavia across the world. From Denmark's role as the host of the Copenhagen Summit to Sweden's internationally-renowned welfare state, brand Scandinavia represents a commitment to freedom, well-being, global citizenship and quality of life that unites these Northern European countries in people's perceptions.

As a rising star in 2010 - moving from 21 to 10 - Sweden in particular cultivated very strong perceptions around the dimensions for value system and quality of life. Specifically, Sweden performed well in attributes such as environmental friendliness, education and health care system, which are all ranked at number two. The strong performance of brands like the airline SAS that bring Scandinavia together shows the power of unifying individual country brands behind regional flag-carriers or corporations that represent common values.

Among the other rising stars of 2010, Chile (No. 40, up 19 spots) improved across every measure with huge leaps in awareness and advocacy, as well as in perceptions of political freedom. The San José miners' rescue became a global news event generating extraordinary goodwill for President Pinera and brand Chile. This, coupled with growing economic stability, makes Chile a brand to watch in the region. With significant marketing investment for tourist destinations, Israel (No. 30, up 11 spots) moved in the right direction, particularly in tourism metrics like authenticity and history, which align with campaigns promoting heritage and culture. Argentina's scores (No. 33, up 10 spots) were up across the board, namely for advocacy. After a quarter-finals position in the World Cup and significant GDP growth in the first half of 2010, Argentina became the first Latin American country to legalize same-sex marriage, a move signaling a triumph of liberal values in the region.

Greece (No. 22, down 8 spots) presented the most conspicuous shift, set against a high-profile financial crisis and subsequent industrial relations problems following government spending cuts and tax increases. Associations of Greece as a tourist destination are traditionally strong in this study, but during sustained periods of bad news - affecting confidence around core services and infrastructure - consideration and advocacy were threatened.

India (No. 23, down 5 spots) was another falling brand, straight off the back of negative global media coverage of health and safety concerns at the 2010 Delhi Commonwealth Games, as well as tourist attacks leading up to the event. The Olympic effect seems not to have lasted long for China (No. 56, down 8 spots), with 2010 bringing public relations challenges around post-Copenhagen environmental impact and high-profile censorship battles with Google. Significant decline in perceptions of political freedom contributed most to the drop in the rankings. A fall for China despite its promotion to the second-largest economy shows that financial growth is no guarantee of brand strength. For more information visit www.futurebrand.com.

E-books have yet to make the grade with college students

Despite headlines proclaiming the death of the printed book due to burgeoning digital content and electronic reading devices, the printed page remains the big man on campus among college students, according to October 2010 data from OnCampus Research, an Oberlin, Ohio, division of the National Association of College Stores (NACS).

Only 13 percent of college students had purchased an electronic book of any kind during the previous three months, and of that percentage, 56 percent stated that the primary purpose of their e-book purchase was required course materials for class. The survey also confirmed a finding of NACS' 2010 OnCampus Student Watch survey in which 74 percent of college students preferred print over digital.

Overwhelmingly, students are reading e-books on a computer rather than a dedicated e-reading device. In fact, 92 percent of students indicated they currently do not own an e-reader, and of those, 59 percent said they didn't plan to purchase one in the next three months. Approximately 77 percent of the students who said they recently purchased an e-book indicated that they used a laptop computer or netbook to read it. Desktop computer was the second most popular choice (30 percent), followed by a smartphone (19 percent). Another 19 percent reported using an e-reader like a Kindle or Nook. A tablet computer, such as an iPad, was the least-common reading device used by students, selected by only 4 percent of respondents. For more information visit www.oncampusresearch.org.

Product and Service Update

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monitor competitive and newsworthy products and services across multiple industry sectors. Each test includes market success scores; measurement scorecards; market segment demographics; media and online habits; and the search behaviors of likely buyers, customers and subscribers. Communications message testing includes messaging and buzz power scores and reasons why people will buy.

The service offers reports, insight and strategic analysis based on products and services tested independently each quarter, utilizing Vantis Express for concept and idea testing. Clients can subscribe by sector (technology, services or durable goods) at either an associate or premium membership level and receive reports with testing results and quarterly Webinars addressing industry developments and analysis from Ipsos Vantis. For more information visit www.ipsos.com.

Briefly

Stamford, Conn., research technology company FocusVision has added high-definition videostreaming to its focus group filming services. HD is currently available in 23 facilities across the U.S., U.K. and Spain, and FocusVision plans to expand over the next year. For more information visit www.focusvision.com.

Decision Pilot, a Redwood City, Calif., research company, has debuted a do-it-yourself polling application using predictive statistics techniques to prioritize choices. The tool is intended to simplify the use of the max-diff scaling methodology, which requires individuals to make a sequence of explicit trade-offs. The service also offers real-time results. For more information visit www.decisionpilot.com.

Vancouver, B.C., research company Vision Critical has launched a Web site (www.visioncriticaltechnologies.com) aimed at enhancing its Global Partner Program. The site is designed to allow interested parties to license or adopt Vision Critical's Sparq technology panel, as well as Vision Critical's virtual shopping platform and associated custom services.

Kantar Health, New York, has launched its Epi Database EM, a Web-accessible database intended to provide researched, documented and comprehensive epidemiology data for health care commercial planning purposes in Mexico and Turkey. For more information visit www.kantarhealth.com.

New York research company All Global has introduced snapshot, a service designed to provide analyzed responses to industry trends and breaking news within 24 hours, with hourly updates available. For more information visit www.allglobal.com.

Encino, Calif., research company uSamp has rolled out SampleMarket 2.0, the next generation of its panel access platform, designed to offer real-time self-service access to uSamp's U.S. panel of respondents. In first-quarter 2011, SampleMarket 2.0 will offer full support for mobile devices, allowing users to log in to market research projects via smartphone; check on real-time feasibility and statistics; and stop or start projects remotely. For more information visit www.usamp.com.

Denver, Colo., research company Qualvu has unveiled a do-it-yourself Web-based service intended to allow businesses to engage consumer groups anytime and anywhere to gain customer intelligence via an interactive video platform. Qualvu uses its own technology and processes to review and analyze consumer feedback and create video highlight reels for online reports. For more information visit www.qualvu.com.

London research company Verve has completed a project to integrate online survey scripting software and data analysis software from Paris research company Askia into Verve Engine, the company's panel and community platform. The integration includes advanced online survey scripting (Flash and multimedia surveys); multimodal interviewing (CATI, CAPI and smartphone mobile); data weighting; and analysis tools. It also designed to allow Verve to offer on-screen dashboard reporting to combine community, sales and other research data into one access point. For more information visit www.haveverve.com.

Survey On The Spot has debuted as a mobile service for restaurants and other businesses to collect customer feedback via iPhone, iPad, iPod or smartphone while guests are on a company's site. The service aims to capture feedback, guest satisfaction surveys, customer comment cards and other types of surveys and is focused on providing management with immediate feedback, as clients receive an e-mail five seconds after feedback is submitted. For more information visit www.surveyonthespot.com.

Stockholm, Sweden, research company Tobii Technology has created an application market for the sharing of applications that function together with Tobii Eye Trackers. The online portal lists software applications that work either by interacting directly with the eye tracker or by analyzing data collected by using a Tobii Eye Tracker. For more information visit www.tobii.com.

ICM Research, London, has launched its Advisor Panel, a specialist research panel of index funds advisors, financial advisors and paraplanners. For more information visit www.icmresearch.co.uk.

Pulse Group PLC, a Kuala Lumpur, Malaysia, research company, has established Pulse Foundation, a platform for members of its Planet Pulse research community to pledge their redemption rewards toward a local or international charity of their choice. The platform will be powered by ammado.com. For more information visit www.pulse-foundation.org.

Ci Research, Cheshire, U.K., has launched a company blog at www.marketresearchexpert.co.uk.

Polaris Marketing Research Inc., Atlanta, has redesigned its Web site (www.polarismr.com).

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New accounts/projects

Reston, Va., research company **comScore Inc.** has adopted Austin, Texas, research company **Kinesis Survey Technologies LLC**'s Kinesis Survey platform to deliver multimode surveys.

Portland, Ore., research company **Rentrak Corporation** has been selected to provide its StationView Essentials local TV ratings service to **Barrington Broadcasting**, Hoffman Estates, Ill., and **Nexstar Broadcasting**, Washington, D.C.

Westlake Village, Calif., research company **J.D. Power and Associates** has signed separate agreements with research companies **Clarabridge**, Reston, Va., and **NetBase**, New York, to expand its capabilities in digital research.

Market Publishers Ltd., London, has signed partnerships agreements with **The PRS Group Inc.**, East Syracuse, N.Y.; **BPA Consulting Ltd.**, Surrey, U.K.; and **Cutting Edge Information**, Limassol, Cyprus, authorizing MarketPublishers.com to distribute and sell the companies' research reports.

Richard Day Research, Evanston, Ill., has selected Oslo, Norway, research software company **Confirmit**'s CATI solution to support its telephone research activities. The deal extends Confirmit's role at Richard Day Research, where the platform is used for the agency's Web interviewing and reporting activities.

Melbourne, Australia, research company **Luma** has adopted Vancouver, B.C., research company **Vision Critical**'s technology to launch ad nest, an ad research tool.

New York research company **WorldOne** has adopted Westport, Conn., research company **Imperium**'s RelevantID digital fingerprinting technology.

Stockholm, Sweden, research company **Cint** has added London research company **Tpoll**'s MindMover panel to the Cint Panel Exchange.

New companies/new divisions/relocations/expansions

Quick Test/Heakin, a Jupiter, Fla., research company, has relocated its West Oaks Mall facility in Houston to Suite 129.

New York research company **StrategyOne** has opened an office in Brussels, Belgium. Antoine Harary will lead the operation.

Jon Batterham and Tom Levesley have launched **Chrysalis Research** in Bristol, U.K. The firm is online at www.chrysalisresearch.co.uk.

IMS Research, Wellingborough, U.K., has opened an office in Seoul, South Korea. The Korean operation will be headed by Harry (Sung Dong) Cho.

Omnicom Media Group, New York, has launched **Annalect Group**, a digital data and analytics division.

Rochelle Park, N.J., research firm **Strativity Group Inc.** has opened an Australian office in Sydney. Brad Meehan will lead the office.

The Court of Crown Prince of Abu Dhabi, United Arab Emirates, and Washington, D.C., research company **Gallup** have partnered to create an independent center for social research and analysis in Abu Dhabi.

Research company **Decision Resources Inc.** has moved its global corporate headquarters from Waltham, Mass., to 8 New England Executive Park, Burlington, Mass.

Lightspeed Research has moved its headquarters from Basking Ridge, N.J., to 3 Mountain View Road, Warren, N.J.

Research Now has relocated its headquarters from Dallas to Plano, Texas. Additionally, the company has consolidated its New York offices so that all New York Research Now staff will be located at 58 West 40th St., New York.

Sydney, Australia, research company **The Leading Edge** has opened its first North American office in New York. Daniel Binns has been appointed to lead the operation.

Chicago research company **Synovate** has launched **Synovate Management Analytics**, an analytics consulting business. Patrick Cummings will head the division.

Boston research company **Chadwick Martin Bailey** has launched a sister company, **South Street Strategy Group**, also in Boston. The firm is online at www.southstreetstrategy.com.

Omaha, Neb., research company **The MSR Group** has begun expanding its corporate offices and call center. MSR will add over 500 square feet of executive office space to its corporate offices and 30 stations to the call center.

San Antonio research company **Frost & Sullivan** has debuted its Capital Markets Support Services in North America.

Research company earnings/financial news

SurveyMonkey, Menlo Park, Calif., has successfully completed a $100 million senior debt financing. Proceeds will be used to retire the company's existing debt and for general corporate purposes.

Harris Interactive, Rochester, N.Y., announced first-quarter financial results for its 2011 fiscal year. Total revenue was $37 million, compared with $38.9 million for the prior-year period. Operating loss for the first quarter was ($1.3) million, compared with an operating loss of ($0.4) million for the prior-year period. Net loss was ($1.3) million, as compared with ($0.6) in 2010.

Framingham, Mass., research company **Kadence USA** reported year-over-year growth for the first quarter ended September 30, 2010, including a 96 percent increase over the previous quarter. Overall sales for fiscal year 2010 grew, with the $2.5 million generated already surpassing 2009's total for the year.

Additionally, Kadence International increased global revenue to $4.2 million in first-quarter 2011, representing a 59 percent rise over the same period in 2009.

The Nielsen Company, New York, reported financial results for the quarter and nine months ended September 30, 2010. Reported revenue for the quarter was $1,289 million, an increase of 5 percent over reported revenues for the prior-year period. Reported operating income was $201 million, compared to an operating loss of ($326) million for the same period in 2009.

Reported revenue for the nine months ended September 30, 2010 was $3,755 million, an increase of 7 percent over reported revenues for the prior-year period. Reported operating income was $515 million, compared to an operating loss of ($42) million for the same period in 2009.

Ipsos, Paris, generated revenues of 283.6 million euros in the third quarter of 2010, up 27.9 percent over the same period last year. Revenues were up 10.5 percent - the first time since the first quarter of 2007 that Ipsos has registered double-digit organic growth. Ipsos' revenues for the first nine months of 2010 totaled 812.5 million euros, up 21.3 percent over 2009.

National Research Corporation, Lincoln, Neb., announced results for third-quarter 2010. Revenue was $16 million, up 18 percent over the prior-year quarter. Net income was $2.1 million, up 7 percent from 2009.

Revenue for the first nine months of 2010 increased 8 percent to $47.5 million, compared to $43.9 million for the same period in 2009. Net income increased 11 percent over 2009 to $6.9 million.

The GfK Group, Nuremberg, Germany, reported financial results from the first nine months of 2010. Sales rose by 10.9 percent to 932.1 million euros, including organic growth of 7.6 percent. Adjusted operating income totaled 120.4 million euros, up 34.1 percent over the previous year. Operating income increased by 62.7 percent to 93.6 million euros.

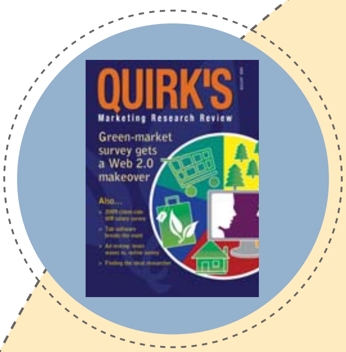
Arbitron Inc., Columbia, Md., announced results for the third quarter ended September 30, 2010. The company reported revenue of $99.5 million, an increase of 1.4 percent over the third quarter of 2009. Net income was $11.3 million, a decrease of 17.4 percent compared with $13.7 million for third-quarter 2009.

For the nine months ended September 30, 2010, revenue was $283.7 million, an increase of 0.1 percent over the same period in 2009.

ComScore Inc., Reston, Va., announced financial results for the third quarter of 2010. The company's results reflect the acquisitions of the products division of Nexius Inc. on July 1, 2010, and Nedstat on September 1, 2010. In the third quarter comScore achieved record quarterly revenue of $45.7 million, an increase of 43 percent over the prior-year period.

Synovate, Chicago, reported earnings for the first half of 2010. The company generated revenue of £152.9 million, compared to £145.4 million in the first half of 2009. Operating profit was £4.7 million, compared to operating loss of £3.2 million in 2009.

IPerceptions Inc., Montreal, reported financial results for the third quarter of 2010. Revenue was $1.3 million, up 5 percent over third-quarter 2009.



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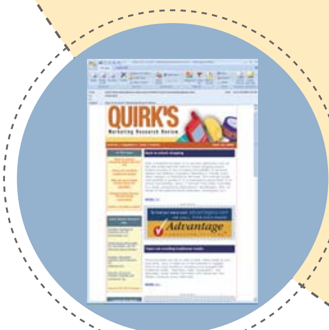

calendar of events

Marcus Evans will host a conference, themed "Consumer Insights in New Product Design and Delivery," on **January 13-14** in Boston. *Quirk's* subscribers will receive a 10 percent discount on full conference registration. For more information visit www.marcusevansch.com/quirks.

Gartner will hold its business intelligence summit, themed "Building the 'Business' in BI: Plan, Platform, People, Performance," on **January 31-February 1** at Park Plaza Westminster Bridge in London. For more information visit www.gartner.com.

The Marketing Research Association will hold its annual CEO summit on **February 16-18** in Phoenix. For more information visit www.mra-net.org.

The Merlien Institute will hold a conference, themed "Qualitative Research in Web 2.0 Asia," on **February 22-23** at the STDM auditorium and Anthony SW Lau Exhibition Hall at the University of Macau in China. For more information visit www.merlien.org/upcoming-events/qrweba2011.html.

The Merlien Institute will hold a conference, themed "Computer-Aided Qualitiatve Research Asia," on **February 24-25** at the STDM auditorium and Anthony SW Lau Exhibition Hall at the University of Macau in China. For more information visit www.merlien.org/upcoming-events/caqra2011.html.

ESOMAR will hold its 2011 consumer insights conference, themed "A New World Order In Shopper Marketing," on **February 27-March 1** in Brussels, Belgium. For more information visit www.esomar.org.

The Council of American Survey Research Organizations will hold its annual online research conference on **March 3-4** at Mandalay Bay Hotel and Casino in Las Vegas. For more information visit www.casro.org.

ESOMAR will hold its annual Asia-Pacific conference, themed "Increasing Value Through Simplicity," on **March 20-22** in Melbourne, Australia. For more information visit www.esomar.org/apac.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on **March 21-23** at the New York Marriott Marquis in Times Square. For more information visit www.thearf.org.

Research Magazine will hold its annual conference on **March 22-23** at the Grange St. Paul's Hotel in London. For more information visit www.research-live.com/research2011.

The Pharmaceutical Marketing Research Group will hold its annual national conference on **March 27-29** at JW Desert Ridge in Phoenix. For more information visit www.pmrg.org.

SymphonyIRI will hold its annual summit on **March 28-30** at the Fontainebleau Miami Beach Resort and Spa in Miami. For more information visit http://cpgsummit.com.

The Merlien Institute will hold a conference, themed "Qualitative Consumer Research and Insights," on **April 6-8** at The Diplomat Hotel in Sliema, Malta. For more information visit www.merlien.org/upcoming-events/qcri2011.html.

IIR will hold a conference focused on design and culture and brand identity and packaging on **April 11-13** in Chicago. For more information visit www.iirusa.com/fuse.

Globalpark will hold its annual mobile research conference on **April 18-19** at The May Fair Hotel in central London. For more information visit www.mobileresearchconference.com.

The Society of Competitive Intelligence Professionals (SCIP) and *Frost & Sullivan Institute* will host SCIP's annual international conference and exhibition on **May 9-13** at the Buena Vista Palace Hotel and Spa in Lake Buena Vista, Fla. For more information visit www.scip.org.

The American Association for Public Opinion Research will host its annual conference on **May 12-15** at the Arizona Grand Resort in Phoenix. For more information visit www.aapor.org.

The Pharmaceutical Business Intelligence and Research Group will hold its annual general meeting on **May 15-18** in San Antonio. For more information visit www.pbirg.com.

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

index of advertisers

trade talk

By Joseph Rydholm
Quirk's editor

2011: The year of belonging?

We ring in 2011 against a backdrop of economic uncertainty - which, all things considered, is probably preferable to the past few years' depressingly bleak economic certainty. Consumers do seem to be opening up their wallets a bit, as evidenced by the sales figures that emerged following Black Friday 2010. Companies are still not hiring at healthy levels, though reports abound that enough cash is accumulating in corporate coffers to support adding new staff and investing in infrastructure. The usual stew of geopolitical crises (North Korea, ailing European economies, etc.) simmers in the background, ready to boil over at any moment.

There's no way to tell what the next 12 months will bring but if the good people at trendwatching.com are right, we may have to add a new variation on the meaning of the term groupthink.

The site has released its annual list of consumer trends for the coming year (you can get it free in a nifty PDF from the site) and, on a macro level, many of these movements offer continuing evidence that technology, far from turning us all into the stereotype of solitary, dis-engaged creatures, is allowing us to explore and expand our (seemingly innate) need as human animals to congregate, communicate and share.

True, a lot of the sharing is ego-driven ("Look at me! Look what I'm doing!") and certainly doesn't come from a place of altruism. But the group/tribal aspects of these trends are fascinating because they show just how powerful the social components of consumption have become. In the old days we called it word-of-mouth but now it's morphed into something so much larger and far-reaching.

Following is a sampling of some of trendwatching.com's 2011 trends that evidence our instincts to form and find new groups to interact with.

Pricing Pandemonium

Combine Groupon, smartphones and our tendency to lust for the best deal possible and you have the makings of the Pricing Pandemonium trend, in which group buying, members-only sales, local discounts and dynamic pricing are the order of the day.

Social-Lites and Twinsumers

As defined by trendwatching.com, Twinsumers are consumers with similar consumption patterns, likes and dislikes who are thus valuable sources for recommendations on what to buy and experience. Social-Lites are "all about discovery, as consumers become curators; actively broadcasting, remixing, compiling, commenting, sharing and recommending content, products, purchases and experiences to both their friends and wider audiences." These two forces come together in the form of consumers who are driven, as trendwatching.com puts it, to build "Brand Me" by creating and maintaining online profiles that record their opinions and recommendations. Thus they are driven to talk, talk, talk about brands wherever and whenever they can, which can be a boon for a company on the receiving end of their praise or a bane to the entity drawing their ire. Engage and court these denizens at your peril but also know that ignoring them may also not be an option.

Urbanomics

As the world's largest cities grow ever-larger, they serve as huge, influential markets full of adventurous, often more liberal consumers who are hungry for products and services that match and mirror their fast-paced lifestyles. For example, workers who have abandoned rural areas for the cities in search of jobs may develop a host of newfound tastes and preferences once freed from the strictures of society and family that previously defined them. Imagine being able to get your products in front of a segment like that. To borrow from Martin Landau's memorable turn as producer Bob Ryan on HBO's *Entourage*: Marketers, is that something you might be interested in?

Planned Spontaneity

In tandem with the Urbanomics trend, Planned Spontaneity puts a label on a generation of city-dwelling, smartphone-bearing (mostly young) consumers who will use their phones' geolocational powers to find out about and join events and activities being taken part in by others like them.

Owner-less

Citing the success of car-sharing programs around the world, trendwatching.com says that as bigger brands such as Hertz and Peugeot get into the act, and as consumers become more familiar with and accepting of the idea of sharing and renting large, expensive or seldom-used objects, the ideas behind sharing programs may move into other realms.

Made for China (if not BRIC)

Western brands are popular the world over, especially in China, and in 2011 many firms are expected to follow in the footsteps of brands such as Levi's, Dior, Hermes and BMW by tailoring products to local tastes and needs, hoping to maintain their marques' inherent cachet while adding a personalized touch that appeals to the buyer's local pride.

Wellthy

The Web, through chat rooms and discussion boards and other sharing mechanisms, has brought a social aspect to wellness and/or disease suffering, which is one part of a three-part movement that trendwatching.com calls Wellthy. First, the site says, the same smaller-better-cheaper evolution that characterizes most tech products will extend to some health-related technologies this year, as monitoring devices (such as Phillips DirectLife) become more portable and/or wearable in addition to costing less. Second, both regular and dedicated medical social networks will continue giving members a vehicle for sharing and discussing their health issues with others. And third, more consumers will gravitate to products with embedded health benefits that are well-designed, desirable, accessible, fun, tasty or interesting.

Emerging Generosity

Playing off trendwatching.com's previously identified Generation G(enerosity) trend, the idea behind Emerging Generosity is that brands and wealthy individuals from emerging markets will increasingly be expected to spread their largesse in their home countries and around the rest of the globe, expanding the focus of their giving to those outside of their usual spheres.

Part of many groups

We will always be most concerned with the welfare of Our Group – whatever group that may be – but technology (specifically the Web and smartphones) now gives us new ways and reasons to start seeing ourselves as being part of many groups, rather than just the ones closest to home or closest to our religion or chosen belief system. Marketers who understand our need to belong – what it means to us emotionally – can position themselves as facilitators of that belonging and profit from the sales and positive feelings that can result when we find another new tribe to run with. | Q

Coming in the February issue...

Using ethnography to track patient adherence

Laura Johnson explores how to use four tools (self-observation, longitudinal observation, multimethod research and technology) to help pharmaceutical companies see the "unseeable" aspects of patient adherence and compliance.

Tips for conducting online research with kids

Pam Goldfarb Liss offers advice on how to conduct effective online research with kids while obeying COPPA and other guidelines. Transparency and good communication are keys to the process.

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before you go...

online and offline

News about Quirk's and quirks.com

Watch for the Topline series on focus group research across the globe

Planning some focus groups in the new year? Let Quirk's new Topline feature be your guide! The Topline series of articles will draw on local knowledge of facility owners around the globe to give you the inside scoop on conducting focus groups in selected metro areas. What makes each area unique? What are the respondents typically like? What are some of the major local industries and Fortune 500 companies? Topline will aim to answer these questions and more. If you are a facility owner and would like to tell us about your metro area, contact Emily Goon at emily@quirks.com.

@QuirksMR

Tweet tweet! Check out Quirk's on Twitter

Yes, we know that 70 percent of all tweets are never read, but even so, Quirk's will be joining the masses and begin tweeting in the new year. However, we hope to take a different twist on our tweets. Instead of just tweeting about what's new, we hope to use Twitter as a tool to provoke, inform and engage you in a way and at a volume you can't replicate offline. Most of all, we hope Twitter will allow us to hear your thoughts and ideas in order to make Quirk's more valuable to you. Follow us at @QuirksMR.

Interest in authoring for Quirk's?

If you've just completed a successful research project or if you have advice on how to achieve better research results, we want to hear about it! Quirk's is always looking for compelling case studies and informative articles on all aspects of marketing research for publication in our print magazine and e-newsletter. Our 2011 editorial calendar also includes new feature topics: neuromarketing research, shopper insights and separate issues focused on health care and pharmaceutical research. Check out our 2011 calendar and submission guidelines at www.quirks.com/about/department/editorial.aspx. E-mail Quirk's Editor Joseph Rydholm at joe@quirks.com to submit your story ideas.

cover-to-cover

Facts, figures and insights from this month's issue

> In almost all cases across all countries, the verbal scale yielded a higher likelihood to agree with statements than the numeric scale. *(page 20)*

> As the respondents get to know each other, the anticipation of their answers becoming the hub of a heated conversation motivates them to sign on early and often. It is not unusual for respondents to exchange e-mail addresses at the end of longer studies. *(page 26)*

> Tracking IP addresses to improve quality can be problematic and potentially biasing in many regions. In countries where Internet connectivity is not yet pervasive, many people share connections in places such as Internet cafes and libraries. As such, employing a hard, one-size-fits-all block on IP address is unwise. *(page 38)*

> The biggest packaging wins come from driving increased consumption by making packaging more visible in the home - and/or by tailoring packaging more directly to specific usage occasions. *(page 51)*

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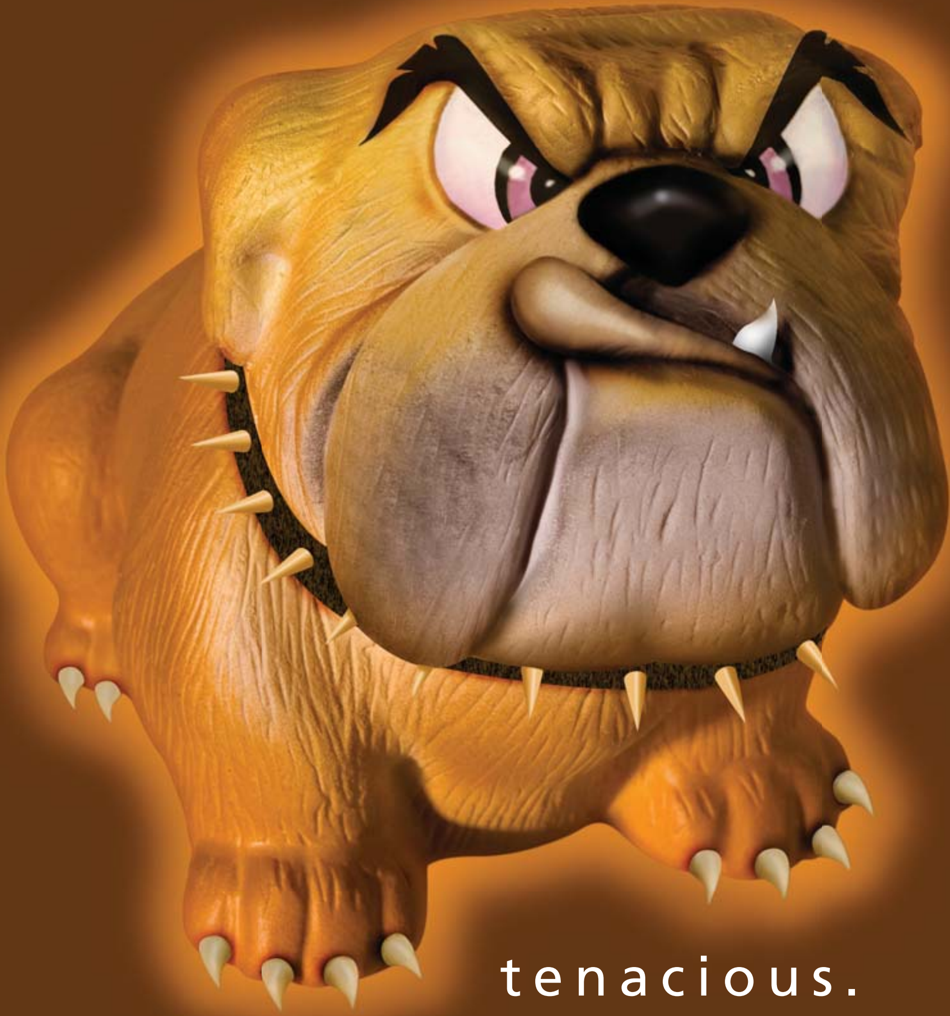
Congratulations to November's winner, Nicole Freund of The Coleman Company Inc., Wichita, Kan. The winner received a free prediction market validation study from the Inforsurv Concept Exchange (iCE).



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