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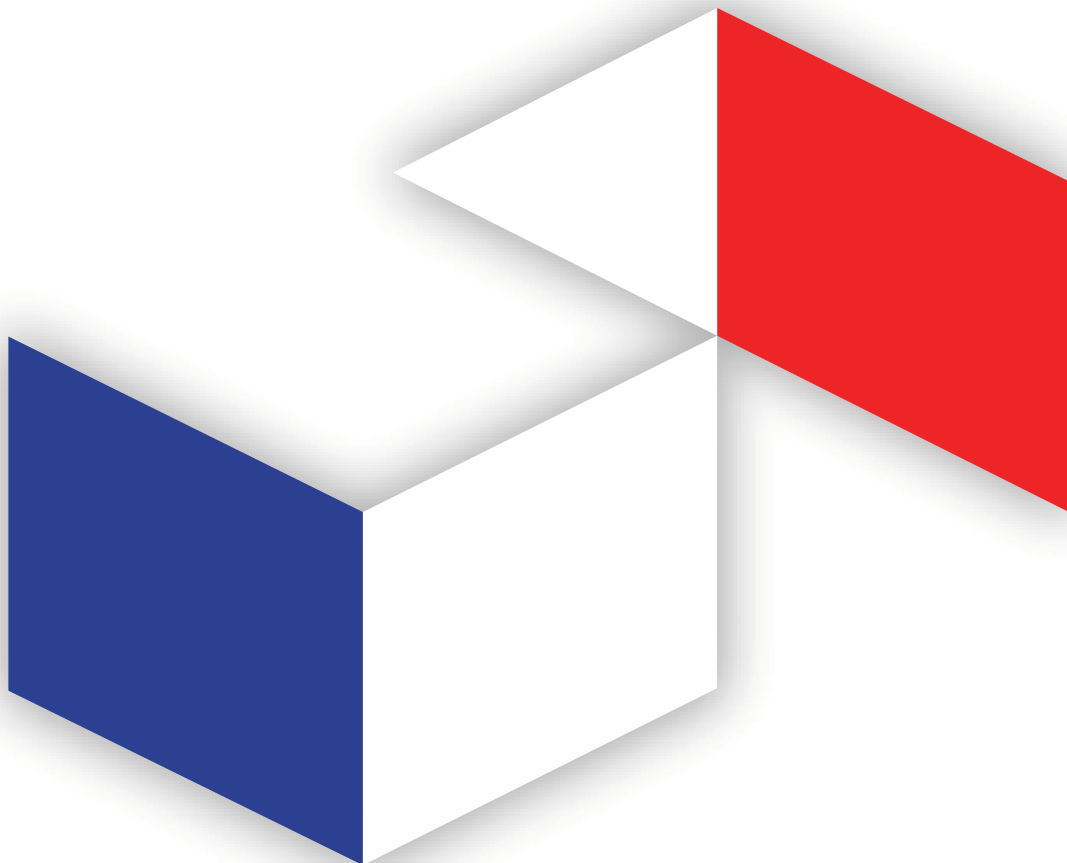
Dell uses  
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to convene  
far-flung  
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## Also...

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- > Neuromarketing research FAQ
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2011 Focus Group  
Moderator Directory

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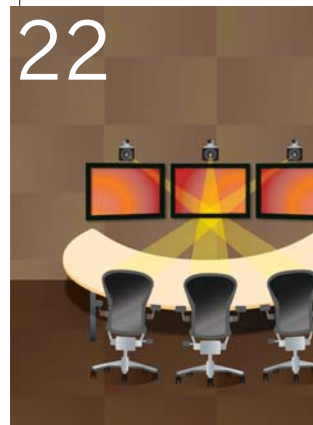


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# in case you missed it...

## news and notes on marketing and research

### Perilous word-of-mouth: Bad news travels fast

When it comes to word-of-mouth (WOM) in the U.S., brands should keep in mind that bad news travels fast. Twenty-six percent of U.S. adults are far more likely to spread the word to family, friends and coworkers about a bad experience with a product or service than a good one, according to Cincinnati loyalty marketing company Colloquy. Colloquy has adopted the term Madvocates for consumers predisposed to engage in negative WOM practices after suffering a bad experience. The corresponding attitude can be called Madvocacy.

Even among consumers who are most loyal to, engaged with and willing to recommend brands they like (known as WOM Champions), 31 percent said they too are far more likely to share information about a bad experience with a product or service than a good one.

"Negative word-of-mouth is a function of the bad experience we all may have on occasion," said Kelly Hlavinka, managing partner, Colloquy. "Rather than uncover a separate group of brand curmudgeons, we instead discovered an overlap of positive and negative stances found among all groups. It's notable that the Madvocacy attitude is significantly more prevalent among word-of-mouth Champions [31 percent] than the general population [26 percent]. One lesson is clear, hell hath no fury like a champion scorned."

Other key Madvocacy findings include: 7 percent of the general population are Pure Madvocates - consumers who aren't connected to brands and aren't willing to advocate for them but who are oriented to negative WOM. Three-quarters of the general population said that when they've had a bad experience with a product or service they advise friends and family. That surpasses the 42 percent who always recommend a product or service they really like; the 71 percent who are always looking to experience something new; and the 67 percent who love telling people about something new they've learned.

"WOM Champions can spread the good word or switch to Madvocacy mode, depending on the treatment they receive," said Colloquy partner Jim Sullivan.

Among demographic groups, affluent consumers scored highest (30 percent) at being far more likely to spread a bad experience. Seniors scored the lowest at 19 percent. In the other demographics, 25 percent of young adults and 25 percent of women are far more likely to share a bad experience. Hispanics' score was 21 percent.



### College students text in classes - but they're sorry!

Rest assured, when it comes to texting in class, college students have a conscience. Although 65 percent of students send at least one text message in a typical class - whether prohibited or not - many don't believe texting should be allowed during class and almost half feel guilty about doing so when they're not supposed to, according to a survey conducted among 1,043 University of New Hampshire (UNH) students by student researchers at the UNH Whittemore School of Business and Economics, Durham, N.H.

While a full 51 percent of students are distracted from class material when they text, texting is alarmingly allowed at UNH. Fifty-one percent of students are prohibited from texting in up to half of their classes and the remaining 49 percent reported being prohibited from texting in more than half of their classes.

"I wasn't surprised by the results, but I was surprised to see that some teachers didn't prohibit texting in their classes," said Gretchen Eastman, one of the lead student researchers on the study.

The study found that business students are the most prolific texters and that women are more apt to text than men.



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## Retired for Hire consumers a boon for financial, office-supply and home-improvement firms

The 6.2 million American adults over the age of 65 who are employed full-time or part-time are overall financially secure and several different industries – from financial services and office supplies to home improvement stores – stand to benefit from their stability, according to a study from Scarborough Research, New York.

These so-called Retired for Hire consumers are slightly more likely than the average adult to have an annual household income of



\$150,000+ and are 51 percent more likely to live in a home valued at \$500,000+. They have a wide range of investments and use a potpourri of financial services. They are more likely than the average American to have stocks or stock options as a household investment (23 percent more likely); a second home or real estate property (36 percent more likely); mutual funds (27 percent more likely); and money-market funds (46 percent more likely). Retired for Hire also exceeds the national average in utilizing financial services such as accountants, financial planners and full-service stockbrokers in their household.

In addition to the banking and financial industry, office supplies providers and home improvement stores

have a large base in Retired for Hire. As a business group, Retired for Hire is significantly more likely than the average American to be self-employed (140 percent more likely) or a small business owner (143 percent more likely). Therefore, they are frequently making purchasing decisions for their companies. Retired for Hire consumers are 32 percent more likely to make IT corporate decisions; 38 percent more likely to make hardware/software choices; and they also select vendors for overnight delivery services, business travel and office equipment. Almost one-quarter of this group shopped Walmart for office supplies during the past three months, making it the leading office supply store for Retired for Hire. However, they are 19 percent more likely than average to shop Office Depot and 18 percent more likely to shop Staples.

Retired for Hire represents some of the country's biggest home improvers. This consumer group is 13 percent more likely to have spent \$10,000+ on all home improvements during the past year. Forty-one percent made a purchase at Home Depot during the past year but they are 29 percent more likely than average to buy at Ace Hardware. For more information visit [www.scarborough.com](http://www.scarborough.com).

### Americans find comfort in creating online health-related communities

Many Americans turn to friends and family for support and advice when facing a health problem but personal networks are expanding to include online peers, particularly in the crucible of rare disease, according

to the Pew Internet and American Life Project from the Pew Research Center, Washington, D.C. Health professionals remain the central source of information for most Americans, but peer-to-peer health care is a significant supplement.

Eighteen percent of Internet users say they have gone online to find others who might have health concerns similar to theirs. One of the most striking findings is the extent of peer-to-peer help among people living with chronic conditions. One-quarter of Internet users living with high blood pressure, diabetes, heart conditions, lung conditions, cancer or some other chronic ailment have gone online to find others with similar health concerns. By contrast, 15 percent of Internet users who report no chronic conditions have sought such help online. Other groups of Internet users who are likely to look online for people who share their same health concerns include those caring for a loved one; those who experienced a medical crisis in the past year; and those who have experienced a significant change in their physical health, such as weight loss or gain, pregnancy or quitting smoking.

When asked about the last time they had a health issue, 70 percent of adults in the U.S. received information, care or support from a health professional. Fifty-four percent of adults turned to friends and family and 20 percent of adults turned to others who have the same health condition.

Adults were asked which group is more helpful when they need certain types of information or support: health professionals like doctors and nurses or peers like fellow patients, friends and family. The pattern of their responses was pretty clear. For technical topics related to a health issue, professionals held sway. With more personal matters such how to cope or get quick relief, non-professionals were

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# names of note

**Donald E. Bruzzone**, founder of *Bruzzone Research*, Alameda, Calif., died March 31 of heart failure.

**Richard B. Wirthlin**, a political consultant and pollster known for his work with former President Ronald Reagan, died on March 16 at age 80.

Chicago research company *Synovate* has made several appointments to its operation in Greater China. **Jenny Chang** has been promoted to managing director,



Chang

Garton

technology and telecommunications. Chang will be based in Beijing. **Steve Garton** has been promoted to managing director, media. *Synovate* has also hired **Roland Leung** as managing director, emerging industries. Garton and Leung will be based in Hong Kong.



Leung

Schneider

**Christopher Schneider** has joined *Roger Green and Associates Inc.*, a New Hope, Pa., research company, as executive vice president, client strategies.

Atlanta research company *CMI* has hired **Cary Matthews** as vice president, operations; **Yvonne Goldberg** as senior project manager; and **Amanda Schiener**, **Michael McEnerney** and **Anna Reese** as associate project manager.

*Research Now*, Plano, Texas, has promoted **Jason Sheppard** to senior vice president, global sales operations; **Jami Pulley** to vice president, client development, U.S. Southeast and Latin America; **Chris Wallace** to vice president, client development; and **Ashley Harlan** to vice president, corporate communications. *Research Now* has also named **Martin Filz** managing director, U.K., and senior vice president, new proposition development; **James Burge** managing director, Asia-Pacific; and **Corinne Villalba** director, client development, based in the company's Paris office. Separately, *Research Now* has expanded its team in Hamburg, Germany, to include **Polina Inselmann**, **Sarah Osswald**,



Inselmann

Osswald



Nikolova

Mahlstedt

**Sabrina Zimmermann** and **Vesselina Nikolova**, client devel-

opment executive; and **Stefan Mahlstedt**, project executive.

**David Deutsch** has joined New York research company *WorldOne* as senior vice president, U.S. qualitative services.

Jupiter, Fla., research company *Quick Test/Heakin* has promoted **Ronald Jolley** and **Carlos Carmona** to manager.

*Centris*, a Fort Washington, Pa., research company, has named **John C. High** senior vice president, marketing and sales; and **L'tanya D. Pittman** research associate. Additionally, *Centris* has added **Mary Eileen Besachio** and **Ann Woodruff** to its professional marketing science staff.

**Robert Raymond** has been named vice president, consulting, GfK automotive, at *GfK Custom Research North America*, New York.

New York researcher *The Nielsen Company* has appointed **Liz Zale** as senior vice president, investor relations. The company has also promoted **Mary Liz Finn** to chief human resources officer.

*M/A/R/C Research*, Irving, Texas, has hired **Leo Schwertley** as account director, central division; and **Jill Rogers** as research director. Rogers will be based in Greensboro, N.C.

*Insight Research Group*, New York, has hired **Steve Becker** and **James Streit** as director. The company has also promoted **Sarah Chumsky** to director, *Insight Kids*; **David Dyte** and **Supriya Sanyal** to director, quantitative analytics; and **Sarah McLoughlin** to associate director.

*Phoenix Marketing International*, a

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# product and service update

## NeuroFocus updates hardware to get inside consumers' Mynds

Berkeley, Calif., research company NeuroFocus has unveiled Mynd, a dry, wireless headset designed to capture brainwave activity across the full brain. Mynd combines medical-grade technology with mobility and is intended to capture data on consumers' subconscious responses in real time wirelessly to improve mobile in-store market research and measurement of media consumption at home. NeuroFocus has also begun building full-brain home panels in addition to its labs.

Highlights of Mynd include full-brain coverage with dense-array EEG sensors; brainwave activity captured across the full cortex; wireless transmission of brainwave signals, capable of interfacing with Bluetooth-enabled devices; dry "smart" electrodes (sensors), eliminating the use of gels; an updated design with easily-replaceable sensors. For more information visit [www.neurofocus.com](http://www.neurofocus.com).

## Kinesis adds two features to its panel and survey offerings

Kinesis Survey Technologies LLC, an Austin, Texas, research company, has added a Diary Campaign feature to its panel management solution Kinesis Panel. Diary Campaign is included in the latest release of Kinesis Panel and is designed to enable detailed management and analysis of market research diary projects by allowing users to set panelist participation metrics, including the minimum/maximum number of survey completes for a given time period, as well as track target quotas, participation by respondent and participation over time.

Via the Kinesis Panel interface, diary projects can be created, implemented and managed throughout the diary's lifecycle.

Ongoing participation analytics are available with reports that can be generated in real time, filtered and exported in .csv format.

Additionally, the company has updated its Kinesis Survey platform to include built-in support for quick response (QR) code generation, thereby enabling respondents to take a picture of a displayed QR code with their camera phone and trigger a mobile survey. For more information visit [www.kinesissurvey.com](http://www.kinesissurvey.com).

## Crowdtap debuts site for crowdsourced social media research

Crowdtap, a New York consumer participation network, has introduced a site designed to allow brands to crowdsource research and drive word-of-mouth campaigns while consumers earn points toward rewards, such as gift cards or free products, by participating on the site. Consumers sign up to use Crowdtap through their Facebook accounts and earn rewards points by participating in polls and discussions. Brands can enlist participants to share content on Facebook, sample products or throw sponsored house parties. Companies can view responses, including share rates and impressions, for research purposes. Crowdtap does not share member-specific information like e-mail addresses with brands but companies can view the demographic information of members such as age and gender. For more information visit [www.crowdtap.com](http://www.crowdtap.com).

## Advertisers only charged for what is seen with Pay-per-Look concept

Ayuda Media Systems, an East Lansing, Mich., advertising software firm, has debuted its Pay-per-Look concept that integrates the Intel Anonymous Impression Metrics Suite (Intel AIM Suite) into Splash, Ayuda's ERP system for digital

out-of-home networks.

Pay-per-Look is designed to allow advertisers to be billed based on how many people actually looked at their ad, which will be determined by using Intel AIM Suite technology that relies on optical sensors to detect faces that turn toward the display while still honoring viewer privacy.

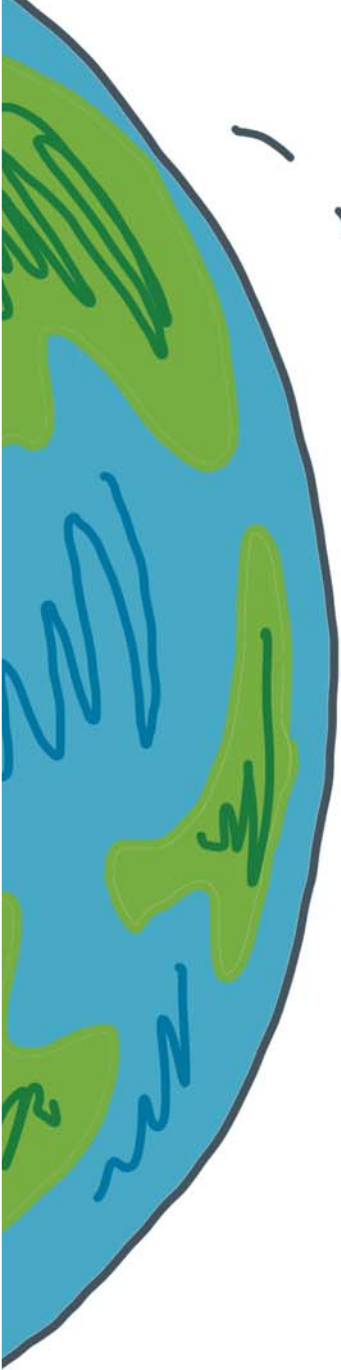
Current practice in the ad-based digital out-of-home industry is to bill based on the number of impressions delivered. However, impression counts are typically based on audience measurement research that counts how many people are exposed to, or have the chance of being exposed to, an ad. By combining anonymous audience detection technology with digital signage software, it aims to detect exactly how many "looks" each campaign received. For more information visit [www.ayudasystems.com](http://www.ayudasystems.com).

## Firms partner to offer integrated biometric research products

Ipsos, a Paris research company, and Innerscope Research Inc., Boston, have partnered to integrate biometric measures of unconscious emotional engagement into a suite of Ipsos' products.

The initial product launch will integrate Innerscope's biometric methods and technology into Ipsos ASI AdLab. This launch is expected to be followed by the integration of Innerscope biometrics into the Ipsos ASI Next\*Connect ad testing approach, as well as Innoscreen Concepts and Pack Evolution, the concept and package testing tools from the Ipsos Marketing group. In each case, the goal is to increase the value of the insights that clients will gain by using the insights from the existing product with the additional power of the biometrics. For more information visit [www.ipsos.com](http://www.ipsos.com).

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## News notes

**The Council of American Survey Research Organizations** (CASRO), Port Jefferson, N.Y., has submitted an official comment to the **Federal Trade Commission** (FTC), Washington, D.C., regarding the FTC's December 1 preliminary staff report, Protecting Consumer Privacy in an Era of Rapid Change: A Proposed Framework for Businesses and Policymakers. CASRO outlined its assertion that any comprehensive privacy standards adopted by the FTC should recognize that the research sector is bound by industry-specific, self-regulatory privacy regimes, such as the CASRO Code, that provide even greater levels of protection.

New York-based **Interactive Advertising Bureau**, the **Mobile Marketing Association** and the **Media Rating Council** have developed the Mobile Web Advertising Measurement Guidelines, a framework to govern how ad impressions are counted on the mobile Web.

Advertising trade groups the **Interactive Advertising Bureau**, the **Association of National Advertisers** and the **American Association of Advertising Agencies** have launched an initiative titled Making Measurement Make Sense to develop digital metrics and crossplatform measurement solutions.

Utica, N.Y., research company **Zogby International** has been rebranded as **IBOPE Zogby International** following Zogby's acquisition by Brazilian research institute IBOPE in 2010. Kjell de Orr will serve as CEO, based in Miami.

Encino, Calif., research company **uSamp** dedicated its Surveyhead survey community to raise money for American Red Cross relief efforts in Japan. During March and April, Surveyhead matched 10 percent of the value of survey-takers' rewards and donated the funds to the international relief organization.

Vancouver, B.C., research company **Vision Critical** has installed its 500th online community panel on its Sparq platform.

## Acquisitions/transactions

London research company **Cello Group PLC** has acquired Yardley, Pa., communications consulting company **Medergy HealthGroup Inc.**

## Alliances/strategic partnerships

Research companies **TRA Inc.**, New York, and **MarketShare**, Los Angeles, have partnered to jointly market their solutions to each other's clients. Specifically, they will offer MarketShare's crossmedia analytics and optimization software and TRA's set-top box and single-source data and analytics.

**Doctors.net.uk Limited**, an Oxon, U.K., network of physicians, and **coliquio**, a Baden-Württemberg, Germany, network of physician communities in Germany, Austria and Switzerland, have formed an alliance to increase peer collaboration among physicians across Europe and improve access to enhanced professional content and online learning.

Portland, Ore., research company **Rentrak Corporation** has entered into an agreement with Birmingham, Ala., software provider **OneDomain Inc.** to integrate Rentrak's StationView Essentials TV ratings database with OneDomain's software solutions.

Dublin, Ireland, research company **Experian Simmons** and the **Latinum Network**, a Bethesda, Md., Hispanic peer-to-peer business network, have partnered to combine Experian's research with Latinum's marketing to reach the Hispanic market.

Scottsdale, Ariz., research company **Thumbspeak LLC** has partnered with **Locately**, a Boston location analytics technology firm, so that Locately technology will be used for the GPS-

based location analytics component of Thumbspeak's Connect platform.

Stockholm, Sweden, research company **Cint** and Finland research company **Zokem** have collaborated to form multipurpose smartphone research panels. The partnership is intended to increase the reach of Zokem's Mobile Life smartphone panels across Western markets using Cint's smartphone technology Thumbspeak.

**The Research Club**, London, has partnered with **Research Now**, Plano, Texas. Research Now will sponsor Research Club events throughout 2011.

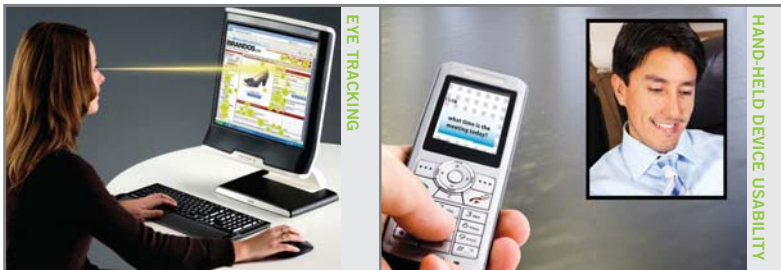
## Awards/rankings

**The Advertising Research Foundation** (ARF), New York, awarded **Domino's Pizza** the ARF Grand Ogilvy Award for demonstrating the most successful use of research in the creation of superior advertising that achieves a critical business objective. The ARF also gave the **United States Census Bureau** the Research Achievement Award for its 2010 United States Census campaign and **Kimberly-Clark** the Research Innovation Award for its Break the Cycle campaign for its Kotex brand. Awards were presented at the Re:think 2011 convention in March.

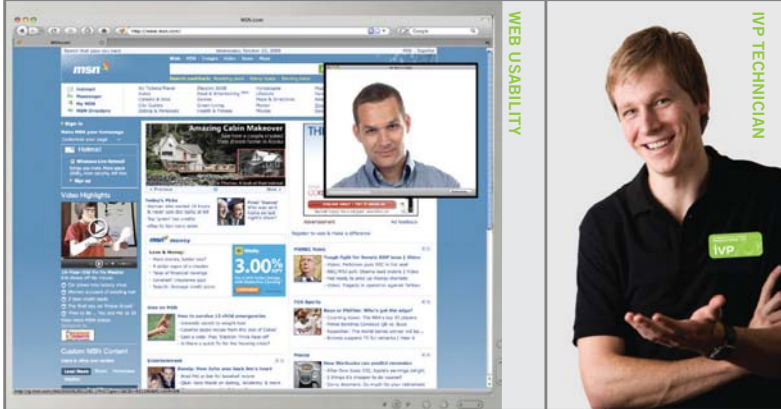
Denver research company **GutCheck** received the \$1 million People's Choice Award for its DIY research offering at the DEMO conference for emerging technologies and new product innovations. The prize is a free six-month advertising campaign worth \$1 million to run across selected titles owned by conference organizer IDG, a Boston IT media, research and exposition company.

Liz Coyle of **IMS Health**, a Norwalk, Conn., research company; Gary Schwebach of **G & S Research**, Indianapolis; Kendall Gay of **KGC**, a Venice, Fla., research

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 L&E Research (Tampa)  
 MARS Research  
 (Ft. Lauderdale)  
 Plaza Research  
 (Ft. Lauderdale)  
 Plaza Research (Tampa)  
 National Opinion  
 Research (Miami)  
 Schlesinger Associates  
 (Orlando)  
 Superior Research  
 (Tampa)  
 WAC  
 (Ft. Lauderdale, Miami)

### LAS VEGAS

Plaza Research

### LOS ANGELES

Adept Consumer Testing  
 (Beverly Hills, Encino)  
 Adler Weiner

(Los Angeles, Irvine)  
 Advanced Marketing  
 Perspectives  
 AIM (Los Angeles,  
 Costa Mesa, Long Beach)  
 Fieldwork LA (Irvine)  
 Focus & Testing  
 Focus Pointe Global  
 House of Marketing  
 Research (Pasadena)  
 Meczka Marketing Research  
 Murray Hill Center  
 Plaza Research  
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### MINNESOTA

Ascendancy Research  
 (Minneapolis)  
 Delve (Minneapolis)  
 Fieldwork Minneapolis  
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# Best practices for well-differentiated questionnaire data

A while back, I heard a nugget of wisdom that resonated with me and has become a core belief in my career as a marketing scientist. I'm not even sure where I heard it (yikes!) but the gist of the wisdom is this: The role of any good marketing scientist/analyst/statistician is to uncover important differences in data. If everything we report is "the same" or "constant" then we really haven't provided any meaningful value.

I try to stay focused on how analytics can deliver better and more critically-important insights and I'm intent on never losing sight of this. If we are to achieve these goals, as both researchers and analysts, we must work with well-differentiated data.

I've thought back over my own experiences and I've come up with some surefire ways of achieving

greater differentiation in survey data. These techniques may or may not be news to you. But, even if you're quite familiar with them, it's equally important to revisit them, as a means of keeping them top-of-mind when drafting your next questionnaire.

So, here we go.

## Longer point scales

Even though this is fairly straightforward and intuitive, many researchers stick with tried-and-true five-point continuous rating and Likert scales. Admittedly, this makes sense when comparing mean responses to research standards (especially for likelihood-to-purchase comparisons). But when this comparison is not required, moving to a seven-, nine- or 10-point scale will reap

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the benefits of greater data differentiation. Seven- or nine-point scales maintain a neutral or indifferent midpoint, which is commonly required. Ten-point scales work well when rating product attribute importance/performance.

Example 1 shows a standard, five-point "likelihood to return" question. Converting it to a seven-point "likelihood to return" question (Example 2) is simple and innocuous.

## Alternate labeling of scale points

A slight change in the wording used for scale point labels, especially at scale end points, can go a long way. When considering alternative scale point labels, try to capture a longer continuum of consideration, while

## snapshot

How longer point scales, alternate labeling of scale points and other strategies can help you wring more meaning from your data.



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Example 1

Q9. How likely are you to return to next year's conference?

very unlikely 1 2 3 4 5 very likely

neither likely or unlikely

Example 2

Q9. How likely are you to return to next year's conference?

very unlikely 1 2 3 4 5 6 7 very likely

neither likely or unlikely

Example 3

Q9. How likely are you to return to next year's conference?

definitely will not return 1 2 3 4 5 6 7 definitely will return

may or may not return

Example 4

Brand Reputation - Respondent Ratings Adjustments

	Original Reputation Rating	Supplemental Rank Ordering	New Reputation Rating
Brand Y	9	1	9.5
Brand X	9	2	9
Brand Z	9	3	8.5

say, a lengthy list of brands in terms of reputation, two or more brands will commonly receive the highest rating the respondent gives. Why not ask a follow-up question about which brand has the best reputation, among all those receiving the respondent's highest rating?

For simplicity, and to keep respondent completion time and fatigue to a minimum, a full rank-ordering of the entire consideration set is not required. Rank-ordering makes more sense to further evaluate top-rated alternatives. That's where consumers make their most important purchase decision trade-offs anyhow, since a second tier of brands, products, etc., is rarely afforded significant thought in the minds of consumers.

This approach does require a back-end adjustment of ratings on the part of an analyst/stat person. This adjustment is a form of statistical interpolation but, nonetheless, is fairly straightforward to apply. Example 4 shows new reputation ratings for three brands that each received a respondent's highest marks (9s on a 1-10 continuous rating scale) among those brands rated.

keeping an eye on the desired information needed.

Example 3 shows a suggested label enhancement to Example 2's

seven-point scaled question.

### Rank order questions

When asking a respondent to rate,

### Straightlining checks and question traps

Straightlining is a respondent's undesirable repetition of the same responses across multiple questions or, more prominently, across a multiple consideration set for a single question. Respondents engage in straightlining behavior when looking to complete a survey quickly, with little or no regard for the accuracy of responses they provide. This results in data not only lacking differentiation, but just being plain wrong (a double whammy).

No doubt this is an age-old problem. But many firms, including ours, have implemented safeguards to combat this behavior and eliminate straightline data from respondent samples. At our firm, we've gone as far as to set up mechanisms to let panel companies know which respondents are engaging in straightlining behavior so they may take appropriate action. We also backfill the respondent sample with

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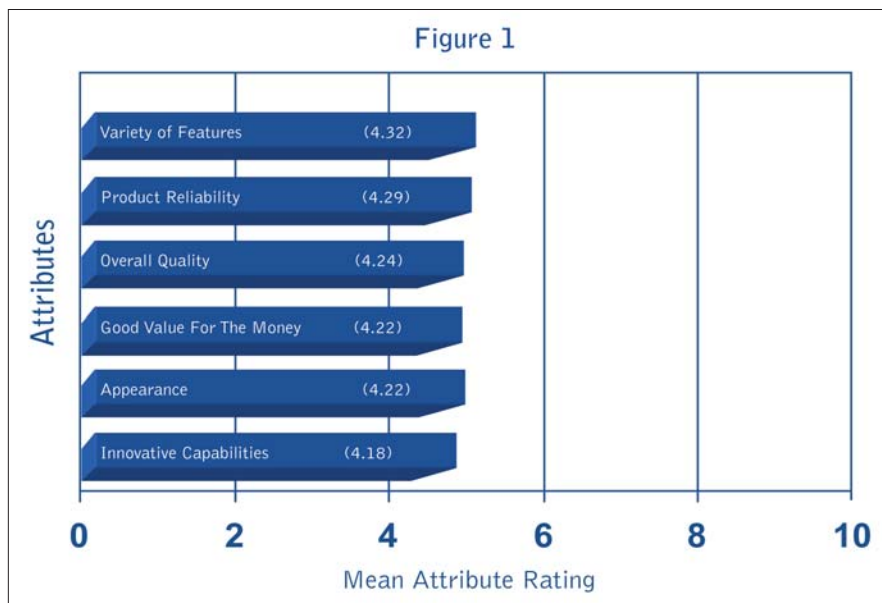
a different respondent while the study is still fielding.

It's the responsibility of the researcher to take advantage of today's on-the-fly question logic technology (for online surveys) and insert appropriate question traps to identify this behavior proactively. One question trap I particularly like is requesting that the respondent provide a specific response ("Please mark a '5' for this item.") for an item embedded in a list of items being rated.

**Choice-based methodologies**

This is a favorite one at our firm. Granted, it also ventures into a more complicated subject matter area but the efforts made to embrace choice-based methodologies return high dividends.

Simply put, designing a robust choice-based experiment and scoring choices via max-diff analysis provides well-differentiated data. While the other tips provided here return what some would consider marginally more differentiated data,



choice-based approaches undoubtedly provide data that is significantly more differentiated.

The benefits originate from the algorithm commonly used to estimate utility scores from the choices respondents make. This algorithm, hierarchical Bayes estimation, provides utility scores with a theo-

retically unlimited range and can be transformed to shares of preference or shares of purchase intent (or share of anything, really - depending on how the choice tasks are worded).

Let's look at an example of how superior choice-based share results are in terms of differentiation, compared to mean ratings results.

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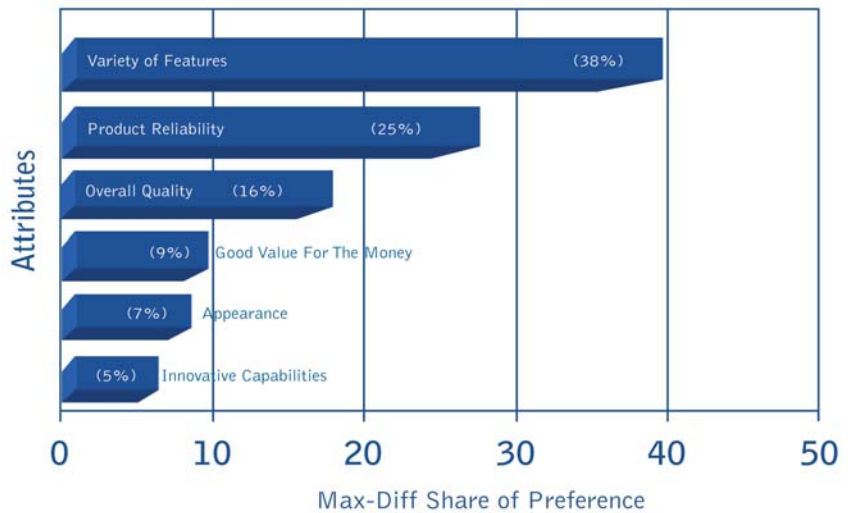
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Figure 2



Mean attribute ratings typically produce ratings with little differentiation across attributes, as shown in Figure 1. Shares of preference that are computed reflect improved range differentiation over mean attribute ratings, as shown in Figure 2.

### Top-box proportions

I kinda cheated by including this one. I say that because this really has nothing to do with the way the data is collected. We're not talking about the way a survey question is framed here. Instead, we're talking about utilizing and reporting out top-box proportions (or top two-box or top three-box) as a summary measure in place of means.

For those not familiar, top-box refers to the proportion of respondents providing the highest value on a continuous ratings-scale-based question. So for example, a top-box percentage of 55 percent on a five-point scale question means that 55 percent of valid responses received were a 5 and the other 45 percent were either 1, 2, 3 or 4. (In some scenarios, the top-box measure includes "don't know" or "refused" responses in the denominator.)

What is intriguing about top-box proportions is that, despite effectively consolidating scaled rating values down to a binary value set (1 = top box indicated, 0 = top box not indicated), we wind up with summary measures that are more differentiated.

Analytic folks may do a double take when considering this, and I admit I've engaged our project managers in lively debates on whether this is appropriate to do.

What I've concluded is that using top-box proportions is a mainstay in market research and will continue to be into the foreseeable future. Its ultimate value, besides greater differentiation, lies in its utter simplicity and intuitiveness.

The researcher does need to consider how top-box proportion results are to be interpreted. My thinking is that their greatest value lies in being an indicator of customer delight. Thus, some parallels between top-box consideration and consideration of results from the Kano model of customer satisfaction can be drawn.

Furthermore, much depends on the client and the client's position in the market. If the client is ready to take the next step to being a market leader, then leveraging top-box proportions as a measure of delight is very relevant. However, if the client is lagging market competitors, and drawing at least even to competitors in critical product/service areas is most important, then top-box measures would be inferior to mean ratings or even bottom-box measures. | Q

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# Need research, won't travel?

## How Dell used telepresence to foster global conversation without traveling the globe

As technology strengthens its presence in the research industry at an ever-increasing rate, qualitative researchers have been seeking out ways to streamline the focus group: video-streaming, Webcams, remote viewing, online focus groups, bulletin boards, etc. Each of these substitutes aims to lessen the cost, time and travel involved with qualitative research and, with any luck, make the experience more convenient and enjoyable for all concerned.

As it stands, the traditional focus group is still alive and well; no replacement method has sufficiently replicated the in-person experience (see: choppy video feeds, reduction in group interaction, observers missing the nuances of the group on location, etc.). But hang on to your hats because we're getting closer.

Round Rock, Texas-based Dell has found that using one kind of technology - telepresence - for some of its focus groups not only approximates the in-person qualitative feel but it also allows it to gather highly-specialized customers in far-reaching locales for valuable discussions.

Dell began using telepresence after being approached by one of its research partners, Mindwave Research Inc., of Austin, Texas. Mindwave had been investigating the technology as a research tool after working with Cisco to conduct focus groups regarding Cisco's telepresence technology.

Telepresence was first developed by Cisco to simplify virtual business meet-

ings but Jonathan Hilland, president and CEO of Mindwave, sought to determine if this *Star Trek*-like technology could be useful in the public marketplace.

*Editor's note: To view this article online, enter article ID 20110502 at [quirks.com/articles](http://quirks.com/articles).*

### snapshot

**A Dell researcher weighs in on the benefits and drawbacks of conducting global research using telepresence technology among a hard-to-reach audience.**

Mindwave originally conducted focus groups for Cisco by inviting respondents in multiple cities and countries into telepresence rooms on Cisco campuses to discuss what they would expect if they were to go into a publicly-rentable telepresence facility. What would they want that experience to be like? What kind of resources would they need at their fingertips? The Cisco groups confirmed that with minor adjustments and some coaching this technology could be an asset to the research industry.

Thus, in 2010, Mindwave launched TruView Research, a separate, wholly-owned subsidiary. TruView negotiated with both Cisco and Tata Communications to use their network of public telepresence rooms located in 30 cities around the world at a discount for the research industry.

### How it works

To understand how telepresence can work for research, it's first necessary to understand how it works. Each telepresence location features three 1080p HD video screens in a semi-circle (to create an identical room on the "other side"); reflective lighting for a more three-dimensional feel; full-duplex audio; 4MB connections on each side; directional, voice-activated video and audio; simultaneous sharing of laptop screen; and the ability to conference multiple locations at once (Figure 1).

"Compared to traditional videostreaming, the big difference is that this isn't a remote viewing technology. This is a remote participating technology. You can moderate from another city. It's not videostreaming over the Web to your desktop. It's everyone sitting around what appears to them to be the same table, engaged in dialogue

as if we were physically in the same room," Hilland says.

Participants arrive at the telepresence facility in their city. The moderator is often in a telepresence room with other participants. The participants in each location sit around a semi-circle table facing three television screens. The screens display a live feed from rooms in one city or in several other cities that are set up to look identical; the screens appear to "complete" the room. Up to two participants can be seen on each screen for a total of six persons seen on the screens at one time. Above each television screen is a camera, aimed at the two-person section of the semi-circle directly across from it. In front of each two-person section of the semi-circle is a microphone. The audio is designed to be directional so the voice of the person speaking feeds



only from behind the screen on which s/he appears.

### Multi-point focus groups

Telepresence allows for several cities to connect at one time though linking more than four at one time is not recommended for focus groups. In these so-called multi-point focus groups, who is seen and heard on the screens is voice-activated. The last person to speak appears on the screen, until the participants seated at that section of the table in another city speak. Although only one location can be seen on each screen at a time, the full duplex audio allows everyone to be heard at the same time. In the case of a heated debate, the first person to be picked up by the microphone will be shown.

Additionally, when conducting a multi-point study, one location can be muted and - since the video feed is voice-activated - therefore be invisible to all other locations. This is ideal for client viewing, as clients are either in the room with the moderator but out of view of the cameras or in another telepresence location. “The muted location can see and hear everything but no one else knows they’re there. It’s even more of a veil than a two-way mirror because in a focus group facility as a respondent, you may not



Figure 1

know who’s behind the glass but you at least see it,” says Hilland.

### Proposed a research project

After Mindwave approached Dell, a current client and a company known for experimenting with new technology and methodologies, Barry Jennings, director, global insights group, at Dell, proposed a research project involving approximately 50 IT managers who use storage area networks in their businesses. Dell needed access to CIOs, CTOs and senior-level technology

executives from all industries who were responsible for making decisions about a very specific type of technology within storage area networks. However, these decision makers were hard to come by in focus group-able numbers; most tend to be concentrated in financial or scientific and engineering sectors.

“These weren’t people that I could go to Dallas and find 20 of very easily,” Jennings says. “There are probably three of them in Dallas, a bunch in New York and San Francisco and another handful in London and Sydney. But the ability to talk them all at once about a single issue was compelling for what we were trying to do.”

Dell needed to reach as many geographies as possible, as quickly as possible. Telepresence took Dell’s storage area network research to New York, London, San Francisco, Australia, Hong Kong, Seattle and Chicago via several multi-point studies in a week and a half. Such an undertaking would be significantly more time-consuming with in-person research, given the travel required.

“We were able to do excellent groups with just the right people who have very focused and specific needs and requirements for this type of technology,” says Jennings.

### Some concerns

While Jennings and his team are keen on using technology to



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enhance their research, there were some concerns in introducing this new medium. “One was, will they really talk? Will they really act like they’re at the same table? We’re talking about putting a piece of technology between people when the methodology is all about people talking. But I honestly was quite surprised how well people got over the uniqueness factor of the technology. For a guy in London to talk to a guy in New York about the same thing with no lag, no latency, no glitches and have a conversation real-time is valuable,” says Jennings.

Telepresence is not a straight replacement for traditional focus groups. Part of making the process work is knowing when and when not to use it, Jennings says. “It’s not for everything. But when it’s in the right application it really does make a real, meaningful difference in terms of travel savings, cost savings, time-out-of-office savings and the overall efficacy of the work we are doing,” says Jennings.

Jennings says that Dell uses the technology across many projects but tends to stay away from telepresence in purely exploratory projects or when there is a vast amount of stimuli involved. The setup does allow for the moderator to present virtual stimuli via a screen underneath the three television screens but doesn’t accommodate anything physical. “I like to be able to control the distribution of the pieces. I like the tactile element. If there is a lot of stimuli, coordination via telepresence is a little suboptimal,” he says.

### Up close and personal

Clients may also find that the time they do spend observing the research yields above-average insights. Because there is a camera pointing directly on each section of the table, respondents can see via the screens in front of them how up-close-and-personal they appear to respondents in other locations. As a result, they tend to be more engaged and more self-aware.

“What that translates to is actually less of the nose-picking, BlackBerry-playing, falling asleep, reading e-mails or generally not paying attention to the focus group,” says Hilland. “We find that it causes

people to be much more engaged either because they’re enamored with how the cool the technology is or because they’re hyper-aware of how all eyes are on them.”

In addition, a client observing a group from a muted telepresence facility can enjoy a comprehensive viewing experience. Participants are fully in-view and audible, with a dedicated camera and microphone per every two seats. “You see every squint, every shift in their body weight, when they’re moving and

squirming. You get all of the non-verbal cues and body language that we pitch as being benefits of qualitative but that a lot of people don’t actually get from the live experience,” says Hilland.

Clients are also more likely to observe when it doesn’t require being away from the office for an extended period of time. Jennings was able to sit down with two high-level senior executives, who typically do not have three days to spend traveling, with some pizza in

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Figure 2: Comparing Telepresence to Other Qualitative Methods

	In-Person Focus Groups	Videostreaming	Online Focus Groups	Telepresence
Reduced travel for clients		•	•	•
Reduced travel for moderators			•	•
Increased global diversity without additional travel			•	•
Availability in desired locations	•	•	•	
Real-time client viewing	•	•	•	•
High-quality viewing experience	•			•
Full-view of body language/facial expressions	•			•
High-quality audio/video recording	•	•		
Video accessibility (i.e., archiving, clipping, replay)	•	•		
Simultaneous translations	•	•		

a telepresence facility in their hometown to observe groups.

### Isn't available everywhere

In terms of cons, while telepresence is well-suited for research in the majority of major-commerce markets, it isn't available everywhere. For researchers looking to reach, say, Salt Lake City and Milwaukee in addition to Boston and Chicago, the project would need to be supplemented with traditional focus groups.

Further, with telepresence not being available in focus group facilities, some additional downsides center around the lack of standard focus group facility-based niceties and practices, Jennings says. "Some of what I'm accustomed to in a facility, like being able to slip a note in to the moderator, takes a different path. It's a very small, minor thing but an important thing. There are some administrative luxuries that you kind of take for granted. When we first started we had to go

to specific sites that were not facilities. So when we were going in, we were going inside of office buildings where this technology was housed and they didn't have the easy places to sit, to work, to interact with one another in the back room. That's changed over time as we've figured out that [the client] can sit at a site to view multiple sites," says Jennings.

### Not the cheapest

And for that experience, clients must be willing to pay. Telepresence's main objective is to save time, improve the remote-viewing experience and deliver more geographically-expansive focus groups - not just save the client money. The standard public rate of \$500 per room per hour (not taking into account the TruView discount) is about four times what most moderators are accustomed to paying for a traditional facility. Granted, research companies have a discounted rate available and there are other savings in travel time and other soft ROI but the initial cost can be a shock.



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“This is not the cheapest methodology. There may be a bit of a premium on the direct cost of the research but that is often times washed out by cutting back the travel and by the productivity,” says Jennings. “At Dell we value conversations with our customers. If we can put the right person in the right conversation - that’s meaningful to our business in a way that’s difficult to calculate the ROI on.”

### Planning and logistics

For all the benefits that come from bringing together a multi-city or multinational focus group using telepresence, those projects require careful planning and logistics. Evening on the West Coast is morning in Asia-Pacific. Lunchtime in Central U.S. is early evening in London. Knowing which cultures are more accepting of morning, afternoon or evening groups is essential. A moderator in New York conducting a group with respondents in Bangalore needs to be prepared to keep odd hours.

In fact, moderators need to be prepared professionally to manage this technology and stay ahead of the learning curve. TruView offers training services to help with the process. The main obstacle comes in familiarizing the moderators with the technology and building a comfort level. For instance, moderators need to be aware of the camera. If a participant on a screen to the moderator’s left speaks and the moderator turns his head to the left to look at the person speaking, it will appear to the person speaking that the moderator is looking away. “You have to train yourself to turn your eyes toward him and see him in the periphery but keep your head more or less facing forward so you can give the appearance that you’re paying attention to the guy - which you really are,” says Hilland.

Overall, though, a focus group is a focus group and most moderators with some tech savvy will be quick to pick it up. The telepresence technology may seem high-powered and complicated - and only suitable for high-powered

and complicated projects - but it can be used to improve research projects of all kinds. Dell is increasingly using telepresence for its simpler projects.

### A unique opportunity

Of course telepresence isn’t the answer to all focus group woes but it does introduce a unique opportunity to contact respondents who would otherwise be off the grid and put those respondents in communication with others like them - without spending weeks living out of a suitcase.

Telepresence allowed Dell to reach out to its widespread storage area network users and gain insights into their technology experience. “For my people doing global messaging and global product development to see where there are commonalities and where there are differences is invaluable. The amount of time saved out of the office and the ability to get like people - regardless of geography - in the room is just very, very powerful,” says Jennings. | Q

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# A clearer picture

## Showtime uses hybrid approach to take the pulse of *Nurse Jackie* viewers

**B**etween DVRs, on-demand channels and an ever-growing list of Web-based options, TV fans have more ways to watch their favorite shows than ever. And while the choices may be bewildering for viewers, they cause even more anxiety among the networks that purvey the shows by splintering the viewership into multiple outlets that all require tracking and analysis.

For insights into how viewers prefer to watch its hit series *Nurse Jackie*, the Showtime network used both quantitative and qualitative methods, drawing on an online survey and a Web-based chats to better understand which viewing platforms (on-demand/DVR/linear) they use and prefer and what drives their viewing preferences and habits.

As one of the goals was to bring the show's viewers to life for internal audiences, Showtime turned to the online one-on-ones of Denver-based research firm iModerate, feeling that the chats would offer up the quali-

tative insights needed to create the viewers' stories by giving *Nurse Jackie* fans a chance to open up in an individual conversation.

*Editor's note: To view this article online, enter article ID 20110503 at [quirks.com/articles](http://quirks.com/articles).*

### snapshot

Quantitative research and online one-on-ones helped Showtime learn how fervent fans of its *Nurse Jackie* series feel about the show and how their lifestyles dictate how and when they watch it.

The study was split into four waves over a four-week period. Showtime conducted an online survey with viewers of *Nurse Jackie* who own a DVR and have access to Showtime On Demand. The quantitative portion resulted in 1,857 completes. The one-on-one chats were added to each of the four waves, and in all, 100 sessions were completed. The viewers who chatted were males and females, ages 18 to 64, who subscribe to digital cable or telephone company TV service, who receive Showtime, who have Showtime On Demand and a DVR and who have watched two or more episodes of *Nurse Jackie* in the current season.

Objectives during the chat sessions included gaining a better understanding of:

- any changes in the platform viewing preferences of *Nurse Jackie* over

the past four weeks;

- any changes in viewing of the current *Nurse Jackie* episode;
- platform-switching from both a functional (DVR has limited space, but on-demand isn't in HD) and emotional (i.e., being part of the water-cooler crowd) perspective; and
- viewer engagement with *Nurse Jackie*.

### Uncover the reasoning

The quantitative data gave Showtime metrics surrounding viewing frequency, television subscription information and demographics. The iModerate sessions painted a complete picture of *Nurse Jackie* viewers and helped Showtime uncover the reasoning behind their viewing and platform preferences. At a high level, the insights revealed that in an ideal world, most fans would watch the live Monday night epi-

sode premiere, and that those who did were the most fervent fans. However, due to an array of work, family and social commitments, most utilize DVR and on-demand technologies to watch the show.

Further, the qualitative research garnered candid feedback surrounding platform benefits, drawbacks and the motivations behind platform switching. In addition, data from the chats made it possible to group viewers and create five distinct personas based on a number of functional (such as lifestyle, schedule) and emotional (such as feelings toward *Nurse Jackie* as a character) factors. Vignettes were then crafted for each persona, giving Showtime a colorful snapshot of the show's viewers.

Below is a look at the qualitative findings for the five viewing segments and a vignette for each that incorporates verbatims from the chat sessions.



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### Those who watch the show primarily on-demand

Watching whenever it is convenient and controlling the viewing experience is extremely important for this audience. Being able to watch any episode is also critical to their preference for on-demand. Features like pause and rewind allow them watch every moment and mitigate interruptions. On-demand also saves space on their DVR for other shows. These viewers are not likely to switch platforms as they don't have time to watch TV shows live and are too busy to remember to set their DVR.

*Stephanie watched the first episode of Nurse Jackie after a co-worker at the office recommended the show. "I was immediately hooked!" she said. Since then, she's tried to catch the newest episodes on Monday nights, but work and family responsibilities often interfere. She's so busy that she frequently forgets to set her DVR, so Stephanie now watches via on-demand. She loves having the ability to pause and rewind whenever her young children or the phone*

*interrupt her TV time. After watching three or four episodes, Stephanie saw an advertisement on Showtime announcing that the newest episode is available a few days early via on-demand. She now always catches the new episode a day or two early simply because "I can't wait to see what happens next!"*

### Those who watch the show primarily live

These fans are the most ardent and they specifically make time in their schedule to watch Monday's episode premieres. They are genuinely excited by the premieres and look forward to the building of anticipation before it's time to watch a new episode. Participating in Tuesday morning "water cooler" conversations about the show is very important for this group. Platform switching is fairly common due to schedule conflicts and everyday interruptions.

*Since Steve started part-time work after 25 years of working full-time, he's had more time to spend with friends and*

*family. "I'm doing my best to spend as much time as possible with the people I love. Fortunately, Nurse Jackie has become part of that." Steve enjoyed the series as soon as he watched the first episode. He told a few friends, his wife and his grown daughter about the show. "For the second episode, three or four people came over and we watched the show together. It was great!" Every Monday the same group comes over to Steve's house for their weekly viewing party. "We have some food, chat about the previous weekend and watch the show. I'm happy Nurse Jackie gives us another excuse to hang out!"*

### Those who watch the show primarily using a DVR

Similar to on-demand, DVR viewers care most about the convenience offered by this format. They are too busy to catch Monday-night episodes and probably wouldn't be able to watch if they didn't have a DVR. They also like that DVR enables them to watch the episodes in high-definition and that they are able to control how long they keep previous episodes on their hard-drive. Platform switching habits closely mirror those of on-demand viewers.

*Kate and Dave have been married for 15 years and have developed similar tastes in TV shows. "We like shows that are intellectually engaging and different from the rest of the junk that clutters the airwaves," says Kate. Despite this, their opposing schedules prevent them from frequently watching together. "I leave for work every day at 5:30 a.m., so I need to be in bed by 9 p.m.," Dave says. "Meanwhile, Kate doesn't even get home from work until around 8 p.m. We rarely have time to do anything together in the evenings, let alone catch our favorite shows when they air." Without their DVR, the couple would have a hard time keeping up with Nurse Jackie. "Whenever we watch, it's a special time for us. I always skip the Monday premiere because it's important that we watch together. We have to make every moment count and our DVR helps us do that," Dave says.*

### Opportunistic Timeshifters

These viewers jump between DVR and on-demand with ease. The



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power to watch whenever it is best for them combined with control of the viewing experience has led Opportunistic Timeshifters away from live viewing for most television programming. They feel like they have evolved beyond live viewing and are extremely content with how they watch the show.

*Maria never knows when she's going to get to watch the next episode. "The way things are with work and my family, it's very hard for me to plan when I can catch the show." For these reasons, she regularly switches between DVR and on-demand to get her weekly dose. "There's only so much free time I have, so when I'm watching television I need to make sure that I'm only watching shows I care about. It's so easy to just channel surf and really watch nothing." She likes DVR and on-demand because it allows her to watch Nurse Jackie whenever she finds herself with a few free moments. "There are times when I find myself waiting at home and have 20 minutes or so of free time. I love that I can quickly flip on the DVR*

*or on-demand station and use that time to see a bit of the show."*

**Combination Viewers**

More so than any other respondents, Combination Viewers care only about one thing - convenience. While primarily relying on the DVR, they also use on-demand and watch live when they can. No matter their choices, these viewers have a degree of loyalty to their preferred method of watching. Combination Viewers will use whatever method is most convenient that week. As long as they are able to watch the show, they will keep their preferences flexible.

*Rachel is a stay-at-home mom with a five-year-old son, Sam. "Between taking him to school, looking after the house and shuttling between his after-school piano lessons and soccer practices, I'm really busy." However, on most Mondays she's able to watch Nurse Jackie during the premiere. "When my husband gets home from work, I kick my feet up a bit and let him handle Sam." But some nights, Rachel is simply too exhausted to stay up to watch the show.*

*"This last Monday I had to get up early for a doctor's appointment, do the usual routine with Sam and spend the afternoon in jury duty. By 9:30 p.m., I was ready to pass out." On nights like these, Rachel depends on her DVR or on-demand to keep up with the show. "Monday nights are fun, but if I'm just too tired I know I can always switch to DVR or on-demand - they are lifesavers for busy moms!"*

**Go beyond**

The research helped Showtime go beyond quantitative metrics and develop detailed personas to more fully understand its viewership. The five personas are known throughout the Showtime research group and provide the team with fun and accurate representations of their audience to refer back to.

In the end, these personas provided Showtime with detailed emotional hot buttons for the refinement of its on-demand communications. Moreover, the personas will help inform Showtime's future online platform endeavors and understand the evolving needs of key viewership segments. | Q



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# Adding another dimension to the story

## How 3-D storytelling collages can jump-start focus group discussions

Marketers and researchers spend a lot of time thinking about brands and product/service categories. Consumers don't. Even for a brand's heaviest users, most brand decisions and interactions are made on autopilot. Because brand interactions are generally not top-of-mind, when consumers discuss brands within a qualitative research environment they tend to gravitate to rational responses, even when many of their brand interactions might be emotionally-based. So how do you turn off the autopilot and get consumers to truly do a conscious self-observation and diagnosis of their brand interaction behavior and attitudes and then share this with you?

Using traditional focus groups is an option. While focus groups may provide a very interactive environment, traditional methods don't always encourage consumers to really do an introspective analysis of their brand/category behavior. Even if the consumers know about the discussion topic in advance - for example, fabric softener - they typically don't spend time before they come to the group exploring how they really think and feel about fabric softener. In their day-to-day life, even when they are using fabric softener, they are generally just going through an automatic routine with very little thought or introspection.

So when they come to a typical focus group and the moderator starts asking them about fabric softener, they have to quickly try to pull up memories based on when they normally interact with fabric softener - at point of purchase, doing laundry, putting on freshly washed clothes, etc. - and this typically generates a "data dump" of top-of-mind answers that may not reflect their actual interactions or give the whole perspective.

Ethnography is another option. Going back to our fabric softener example, using ethnography, we can become observers of consumers as they interact with the brand/category through shop-alongs and observing people doing their laundry in their homes. However, even with the most experienced ethnographer, this may not give a full picture of the process because the fact that you are observing them may change what they would normally do.

Clearly both options have their

### snapshot

The author explains how 3-D collaging gives respondents a wider range of artifacts with which to express their feelings on a product or service, potentially unearthing a richer lode of insights.



By Susan Fader

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strengths and weaknesses. We think there is a way to get the best of both worlds.

What if you could conduct focus groups where the participants are primed to immerse, observe and think about their brand/category interactions prior to attending the groups without biasing the research? Then their responses would actually reflect an in-depth self-observation and analysis on how they interact with the category, brand, product, etc., based on real-life day-to-day experiences. You would get an inside view of the consumer in their own words and from their perspective.

One techniques that elicits this view is a 3-D storytelling collage that participants create prior to attending a focus group. The 3-D collage process and purpose is very different from a traditional collage where people hastily rip pictures from whatever magazines they have on hand and glue them to a piece of paper. It requires people to think beyond magazine pictures. Working with 3-D objects creates an environment where people have to step back and do an in-depth examination of their behavior and attitudes so that they can be translated into a 3-D environment.

Also, unlike many creative techniques that can only be done with

“creative” people, which may bias the feedback, we have found that typical consumers can easily and effectively create the 3-D collages.

### Any type of visuals

In general, to prepare them for the process, respondents are told that they will need to complete a detailed collage at home before they come to the discussion group. They are urged to be creative and use any type of visuals to represent their feelings or viewpoints. Beyond mere magazine cut-outs, they can use 3-D materials, drawings or anything else they can think of to represent what they are trying to convey. For example, candy wrappers can be used to represent indulgence, broken watches to represent time or drink umbrellas to represent relaxation.

To prevent biasing feedback, the 3-D collage assignment is generally built around a broader category question and not about a specific brand or product. Using our fabric softener example, we would not ask them to create a 3-D storytelling collage about fabric softener specifically. Instead we could ask them to create a 3-D storytelling collage about the world of laundry:

- What are the four distinctly different things you like about

doing laundry?

- What are the four main frustrations you have with doing laundry?

Therefore, we would ask the participants - who will probably be doing at least a couple of loads of laundry prior to the group - to make laundry top-of-mind, which is where fabric softener resides, without ever mentioning fabric softener. In preparation for this 3-D collage, as they are doing laundry in their normal routine and in their normal environment, they are being more mindful of laundry as they are doing it, and paying attention to how they do things and why they make the decisions they make. They then draw on this real-life, in-the-moment thinking to create their 3-D collages and frame out their stories.

Thus they come to the focus groups having really thought about the topic. Because they spent time integrating 3-D objects into their collage and taking notes of specific behaviors as they were interacting with the category and brand in their day-to-day lives, they have really examined their attitudes and behaviors, what they are thinking and feeling and how and why they interact with/think about the category or brand. They are confident in their opinions, even if they are the only ones in the group to feel that way. The 3-D collage also helps uncover and explain a lot of their emotional and automatic/subconscious behavior.

### Truly unaided

The participants present their 3-D storytelling collages at the very beginning of the groups before they are asked any questions or shown any stimuli, so their feedback on the topic, e.g., laundry, is truly unaided. On average, participants can easily speak uninterrupted for about three minutes while sharing their stories and using the 3-D components to animate their storytelling. Many times, the collage storytelling uncovers perspectives and attitudes that the brand team may not have known were relevant. The 3-D




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collages, going back to our fabric softener example, could elicit feedback such as when and if in their laundry story fabric softener is even mentioned; how fabric softener is viewed in the laundry process; what adjectives, phrases and descriptions are associated with fabric softener; and frustrations they have.

Rather than having them answer a series of questions in the order dictated by the discussion guide, this storytelling process allows the participants to talk about laundry however they want, so we not only hear their stories but how they tell the stories, including what they say, how they say it, what parts they emphasize and sometimes, more importantly, what they leave out.

While the participants come to the research comfortable in their opinions, they also share and ask each other questions about the stories behind the collages. This process may uncover new relevant touchpoints. In addition, this storytelling process often addresses many of the probes that appear later in the discussion guide in a natural, unaided way, thus eliminating the need to ask these questions directly. We get all these insights without even asking about fabric softener!

**Certain elements need to be in place**

We have successfully used this technique across categories, demographics and numerous countries for a number of years. We do not need to screen for “highly creative” participants, but we have found that certain elements need to be in place for the 3-D collage and storytelling to be successful.

An **experienced researcher** who:

- understands how to create questions that lead to meaningful introspection/thinking prior to the group while avoiding bias, i.e., which one or two questions should be used to create the 3-D storytelling collage;
- creates a recruiting screener that selects participants representative of the general target popula-

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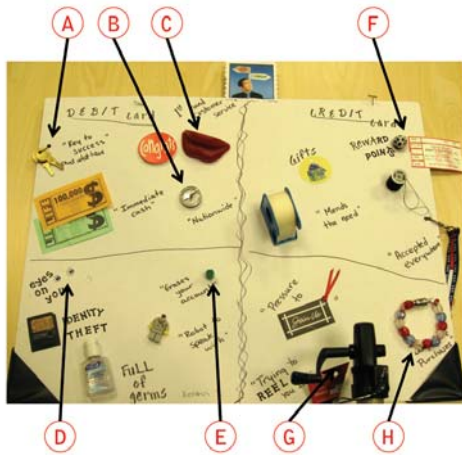


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Figure 1: Payment Card



- A. Keys - If you only spend what you have, then you have the key to successful budgeting.
- B. Compass - Debit cards are accepted nationwide.
- C. Wax lips - My debit card has great customer service.
- D. Wiggle eyes - When I'm typing in my PIN I feel like everyone is watching me and trying to see it.
- E. Eraser - Using the debit card erases the money in your account, so you might not have money if you suddenly need it.
- F. Soccer ball and sports event ticket - I get reward points with my credit card, so I can use them towards doing things I like.
- G. Fishing reel - They reel you in with credit cards so you spend more money than you have.
- H. Bracelet - With my credit card I'm more likely to make unplanned purchases, which can get me into trouble.

Figure 2: Parasite Prevention



- A. Red string - I have to remember to give the cat medicine every month.
- B. Pictures of person's cat and home - I care a lot about my cat, so I don't want anything bad to happen to her.
- C. Cartoon - It's hard giving my cat the medicine because she always fights me on swallowing the pill.
- D. Invoice from veterinarian - Just a check-up is expensive with the vet, and then you add the cost of the parasite medicine each year and it really adds up.
- E. Straw basket of money - It costs a lot for six months of medicine.

tion for the study, even if we are asking them to do something creative;

- creates detailed instructions that explain the collage without scaring off potential participants.

**Detailed instructions** on how to create the 3-D collage with examples of how visuals and materials can be used that are both read to the participants during the recruiting process and sent to them well in

advance of the research.

An **experienced recruiting partner** who is:

- not focused on just recruiting bodies to fill the chairs but on getting participants who will take the time to really think about the topic in advance;
- willing to go the extra mile and explain the collage in detail as scripted by the researcher and not try to summarize the instructions;
- aware that a project with such an assignment needs to be fully recruited well in advance of the research so that the participants have at least three to four days to both think about and create their collages prior to coming to the groups.

As long as all of these elements are in place, we have had participants from all walks of life create very detailed collages with rich stories behind them across a wide range of categories/topics.

### Act as lie detectors

Often these collages provide feedback that is key to the research findings/strategic analysis, and it ensures that the feedback is true to the participants' lives. In addition, these collages act as lie detectors or as unrealistic rational thought detectors. If, during the latter parts of the group when concepts and/or other stimuli are shown, the participants start saying things that are inconsistent with their previous unaided 3-D storytelling, the moderator knows to probe further

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Figure 3: Vaccine



- A. Actual product packages (Doritos bag, liquid soap bottle, Dove soap box, etc.) - I can get my vaccine while I'm picking up other things at the pharmacy. That would be convenient - one-stop shopping.
- B. Hand wipe - I'm not sure if getting a vaccine at the pharmacy would be as clean as the doctor's office.
- C. Real U.S. coins - A vaccine at the pharmacy might cost more than from the doctor.

Figure 4: Checking - Debit Card



- A. Wristwatch - My debit card is quicker than writing a check or even using cash.
- B. Staples Easy button - Debit cards are easy to use.
- C. Freezer bag - If there's a problem, the bank will just freeze your debit account. Then I can't get money.
- D. Kid's Toy (Hamburglar) - Your debit account number can be stolen just like a credit card number, and then they just freeze your account.
- E. Cut-up credit/debit cards - The debit card looks just like my credit card, so sometimes I accidentally use my credit card instead.

- “You liked this concept, but in your collage, you said that wasn’t important to you. Help me understand.” This step provides a reality check and ensures that participants articulate the missing links on how they come to conclusions. Without the 3-D storytelling collages, the moderator would not have that extra filter in place.

The 3-D storytelling collages, regardless of the category or the demographic, have provided deep, rich feedback that may not have been gotten in a traditional question-and-answer focus group. Below are some examples, and in the accompanying collage pictures we have called out some of the three-dimensional components of

the collage. (Note that the examples also include some short quotes, but the stories told when the 3-D collages were presented were much more detailed.)

**Payment card project**

*The question:* When researching a new type of payment card, we asked the participants to create collages explaining how and when they decided to use a debit card versus a credit card.

*The findings:* While we had not specifically asked about pain points associated with each payment method, when presenting their collages every participant talked about frustrations they had and what could be done to make both prod-

ucts more appealing.

*The implications:* Based on this feedback, even though the participants reacted positively to the concepts, we were able to see that the new payment-card concepts that were being explored during the groups were not addressing their pain points or building on the reasons they chose various payment types.

**Feline flea and tick prevention project**

*The question:* This exercise was done with cat owners (both users and non-users of flea/tick prevention products) who were asked to list reasons they would and would not use flea/tick prevention on their cats.

*The findings:* Of course, this exercise led to detailed stories about the motivators and barriers to using flea/tick prevention. However, it also led to valuable feedback that was not part of the initial research objectives or even an initial concern of the clients. The feedback ended up impacting the product positioning. Specifically, the cat owners defined an “inside cat” and “outside cat” quite differently from the client and the veterinarians. For cat owners, an outside cat lived outside and never went inside, while an inside cat slept inside but also could go out in the backyard or on the porch. In addition, many cat owners felt that an indoor cat, as they were defining it, didn’t need flea and tick prevention even if it often spent some time outside.

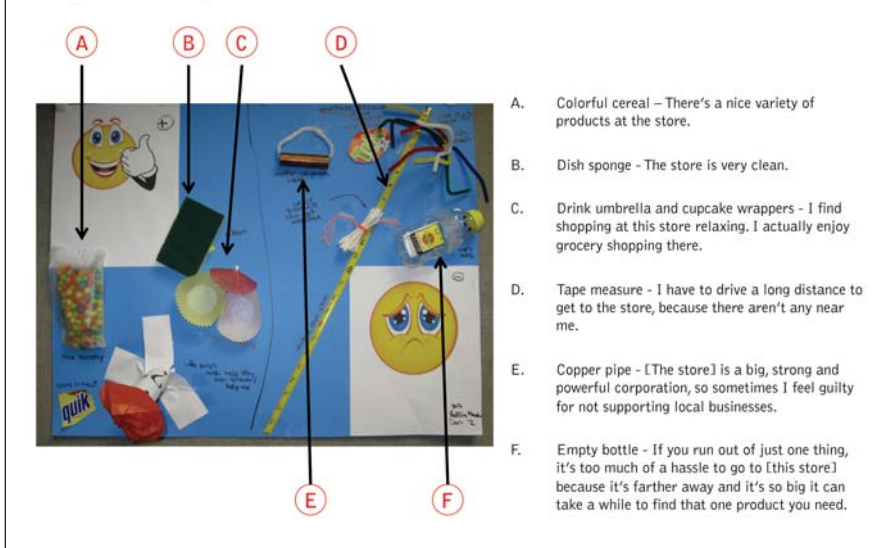
*The implications:* Led to new ideas for positioning the flea/tick prevention product and new ways for veterinarians to talk to cat owners about flea/tick prevention.

**Department store research**

*The question:* In a project for a department store, women who shopped at a range of different department stores created a collage illustrating what they liked and didn’t like about the shopping experience at our client’s and competing department stores.

*The findings:* This exercise helped elucidate how they really felt about our client’s department store without alerting them to the fact

Figure 5: Supermarket



that we were interested in learning how to enhance their usage of the department store’s retail credit card. Even though we had not mentioned the retail store credit cards, in nearly all cases the women spoke (unaided) about their feelings – both positive and negative – about the different retail store credit cards associated with the different stores. In addition, while all of the stores were rationally seen as stores that provided items for the whole family, the store we were researching had a different emotional connection for the women. This particular store was one that

they reserved for their “me-time,” when they were relaxing and shopping for themselves. Therefore, while on a practical level this store was no different from competitive stores, on an emotional level it was seen completely differently and this exercise helped the participants articulate that difference.

*The implications:* Incorporated “me-time” rewards into the retail credit card, which led to increased usage of the card.

### Vaccination research

*The question:* When researching in-store signage and

brochures for flu vaccinations, we asked the participants to create a collage explaining why they would or wouldn’t get vaccinated in a pharmacy. (Some had previously been vaccinated in a pharmacy, others had not.)

*The findings:* We learned that while pharmacies were seen as convenient there were many reasons participants were reluctant to get vaccinated there, including concerns about who was administering the vaccine; the cleanliness of the pharmacy; questions about whether the pharmacy would be administering the same vaccine as the doctor’s office; privacy; cost, etc.

*The implications:* This feedback clearly identified new, specific directions and possibly barriers that were currently missing from the proposed in-pharmacy posters and brochures.

### Checking account/debit card project

*The question:* Consumers were asked to create a collage about why they like using their debit card and why they don’t like using their debit card.

*The findings:* We learned that consumers liked using their debit cards for budgeting purposes and that using them was as easy as a credit card. However, they have a lot of concerns about fraud protection and how fraud affects their bank accounts.

*The implications:* The feedback showed the client that there was a market for a new card that had the budgeting power of a debit card but with the fraud protection of a credit card.

### Supermarket project

*The question:* For a project about a supermarket’s consumer reward card program, consumers – both cardholders and non-cardholders – were asked to create a collage about what they like about that store – both the shopping experience and the actual company – and what they don’t like about the store.

*The findings:* We found that most consumers genuinely enjoyed the shopping experience at this store but none of the consumers – neither cardholders nor non-cardholders

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Figure 6: Ideal Pen



what it would feel like and what problems it would solve.

*The findings:* This helped solidify what they wanted prior to seeing all the pens. Therefore participants could clearly show and explain what they wanted.

*The implications:* As a result, prior to showing them any stimuli, the participants clearly articulated to themselves what parameters a pen would need to meet to be considered good or better than existing pens, so they were not overwhelmed by all the choices. We were also able to use the collage storytelling knowledge to probe their reactions to the proposed pen designs in a more meaningful way.

- mentioned the store's consumer reward program or its benefits in their collages, which showed that the program was not top-of-mind in the shopping experience.

*The implications:* The client realized that the program needed to be better communicated in the in-store signage, cashier interaction, etc.

### New pen line project

*The question:* In a project where we would be showing over 50 pen prototypes, we felt this amount would overwhelm the consumer so we asked the participants to use visuals and 3-D materials to describe what their ideal pen would be, including what it would look like,

### Best of both worlds

If done properly, 3-D storytelling collage technique can combine the best of both worlds - focus groups and ethnographies. Therefore, this technique should be considered as an addition to an experienced market researcher's already rich arsenal of methods and techniques. IQ

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# Marrying phone and Web

## Why Web-assisted TDIs are a cost-effective qualitative methodology

Market researchers are frequently asked to provide more value for less cost in a shorter time frame. The Internet offers a variety of suitable methodologies to conduct qualitative research, such as online bulletin boards, virtual focus groups and video chat interviews. One cost-effective methodology is the Web-assisted tele-depth interview (Web-TDI). While the technique may be old news for many, its pros and cons may not be well understood. This article presents an overview of: how Web-TDIs differ from traditional methods; two Web-TDI example studies; advantages of Web-TDIs; limitations of Web-TDIs; technological choices and avoiding pitfalls; when to use Web-TDIs.

### How Web-TDIs differ from traditional methods

Web-TDIs are one-on-one telephone interviews conducted while also showing respondents information over the Internet. With standard TDIs, respondents either are not shown stimuli or are sent stimuli via mail/e-mail. Sending stimuli to respondents is not ideal because this information can be easily sent to competitors. Unlike in-depth in-person interviews (IDIs), moderators and clients cannot observe facial expression or body language with standard Web-TDIs. Also, it is more logistically challenging to manipulate materials with Web-TDIs vs. conducting IDIs. With these two exceptions, Web-TDIs are very similar to IDIs. The discussion guide may be identical for Web-TDIs and IDIs except for the moderator's stage directions.

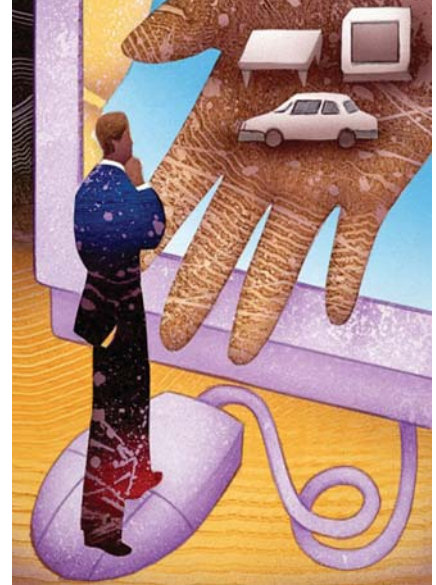
### Two Web-TDI example studies

Two common research studies in which Web-TDIs have been used successfully are concept testing and message testing. One example is concept testing for physician journal ads where the manufacturer is trying to decide the best way to convey product messages to its key targets. Often three concepts are produced, with two different executions of each concept. To measure stopping power (i.e., the likelihood a respondent will stop and

read the ad), one execution of each concept is shown briefly and then respondents are asked what they recall and how likely they would be to stop and read further. After this exercise, each execution is examined in detail and respondents are asked about the imagery, headline, body text and tagline. Conducting Web-TDIs for this concept test involves showing the concept executions in specific shuffled orders for a set amount of time.

### snapshot

The author explores the pros and cons of Web-assisted tele-depth interviews, suggests usage examples and offers a host of best practices to get the most from the technique.



By Tom Donnelly

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Another example is message testing for a pharmaceutical brand where the manufacturer is interested in which messages resonate with the target physicians and how best to convey the brand's story. Typically, there are sets of messages (aka message buckets), such as efficacy, safety, etc. One way to conduct Web-TDIs is to use a spreadsheet with a tab for each message bucket. For each tab, messages are listed as rows and various attributes (e.g., credible, unique, motivate to Rx) for which messages are to be rated are listed as columns. After all message sets have been reviewed, messages that were selected to be included in the story can be shown on a new tab using spreadsheet programming. On this tab, messages can be put into the best order for a conversation between a drug representative and a physician.

**Advantages of Web-TDIs**

There are several advantages to using Web-TDIs.

- Research objectives can often be met at lower study cost by saving

on travel, facility and lower honoraria.

- Research projects can be completed in less time because the recruitment and fielding is faster and travel days are eliminated.
- Stimuli can be adjusted easier and quicker. Sometimes a new set of materials needs to be produced for IDIs and shipped to the next facility location, whereas using Web-TDIs, the stimuli can be adjusted and sent electronically to the moderator in between interviews.
- Respondents can be recruited from a broad geographic area, whereas IDIs are often limited to a handful of cities.
- Scheduling is more convenient for respondents due to a broader range of interview times and elimination of respondents' travel to the facility.
- Replacement of cancelled interviews is easier because the Web-TDI schedule is flexible and the pool of potential respondents is much larger.
- More detailed notes can be taken by the moderator compared to an

IDI, in which the moderator must focus on respondent eye contact and body language as well.

**Limitations of Web-TDIs**

There are also several limitations to using Web-TDIs.

- Respondent IT issues can potentially derail interviews, such as if respondents do not have high-speed Internet access at the time of the interview or respondents' firewalls prevent access to the Web portal. It is prudent to verify conditions before the interview with a brief trial run.
- Manipulating and/or rotating the stimuli across interviews might interfere with moderating. It is recommended to practice the process to mitigate this issue.
- Keeping documents confidential remains somewhat an issue, although Web-presentations are safer vs. standard TDIs. For example, Web-TDI respondents might be able to take screen shots or photos of the screen. Most Web

portals have built-in safeguards but this remains a potential risk.

- Client guidance for the moderator during the interview may be limited. One option is to use instant messaging or chat on the Web portal out of the view of the respondent. Another option is to use the lobby feature of the teleconference call to confer with the client privately.
- Inability to observe a respondent's body language or facial expressions with standard Web-TDIs can reduce interpretations. Video chat can be added if seeing respondents' reactions is vital.
- Lack of commitment by the client market research team can be an issue. Often the team is willing to travel to view IDIs but do not listen to research live for Web-TDIs due to unexpected impromptu meetings that may take priority. Clients would need to closely manage their team, perhaps using calendar meeting requests or asking for feedback from the team at the end of each interview day.

- Sorting, rankings and ratings can be logistically more challenging for respondents. A brief online survey or spreadsheets could be adopted to capture respondents' answers.
- Some stimuli are not suitable for Web-TDIs, such as medical devices or oversized materials.

#### **Technological choices and avoiding pitfalls**

It is important to choose the best technology to fit the research objectives and the moderator's style and experience. There are many factors to consider.

- Some Web portals allow the moderator to pre-load stimuli onto the Web interface. This can be useful because it allows the moderator to focus on the interaction with the respondent rather than having to think about what/how stimuli are shown.
- A Web survey can be created to click through. The survey can be built with skip patterns and the respondent can enter responses (as

with standard online surveys) for later data analyses.

- Some Web interfaces allow screen-sharing to facilitate viewing of the stimuli by the respondent. In addition, these interfaces allow the moderator to pass control to the respondent for self-paced reading and data entry (e.g., ranking and ratings). The moderator needs to take steps to avoid non-research information being displayed to respondents (e.g., e-mail "ghosts," IM chat).
- Some Web portals provide teleconferencing as an add-on service, such as VOIP and/or standard landline. However, a separate teleconferencing line may be considered based on factors relating to cost, reliability and simplicity.
- Interview recording is often a requirement. Record the interview by using an audio recorder connected to the telephone line or computer. Or, utilize the conferencing recording feature, either audio-only or capture the visual portion as well.

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Potential pitfalls using Internet technology should be anticipated and steps should be taken to avoid them.

- Design screeners to ask respondents if they will have high-speed Internet access during the interview.
- Provide simple instructions to respondents to test the Web portal with the computer they anticipate using during the interview.
- Moderators should rehearse the interview process thoroughly.

- Moderators should have a checklist for themselves that includes all steps involved during the interview process. This will avoid forgetting simple commands (hit \*1; dial respondent; turning on the audio recording; mute client phone lines, etc.).
- Moderators should prepare materials for data collection processes (e.g., rankings and ratings) and rotation of stimuli across interviews.
- Anticipate and rehearse client and moderator communication during the interview.

- Build in extra time between the first few interviews to allow for delays and changes to stimuli and procedures.

### When to use Web-TDIs

In some cases, Web-TDIs can replace IDIs and save both time and study costs while still meeting research objectives. However, some studies are best conducted in-person. Making this decision involves considerations beyond time and budget issues. If the answer is yes to any of the following, traditional IDIs should be contemplated.

- Does the respondent need extensive moderator explanations during the interview because the interview exercises are complex?
- Are the body language and facial expression of respondents crucial to the research analysis?
- Is there an extremely low tolerance for the risk of the stimuli being obtained by a competitor?
- Are materials too large or 3-D or do they need to be physically handled (e.g., a medical device)?
- Does the moderator need detailed client guidance during most interviews?
- Will team members be unlikely to dedicate the needed time to listen in live to Web-TDIs?

Web-TDIs are most useful when:

- Time and budget are limited.
- Research stimuli are likely to change often during the research.
- Respondents are difficult to recruit or a wide geographic sample is requested.
- Stimuli can be easily displayed on a computer screen.

### Tackle the challenge

The Web-TDI is a proven market research tool for tackling the challenge of providing more for less. Market research clients need to evaluate the pros and cons of using Web-TDIs versus traditional IDIs. Moderators need to carefully choose their interview Web-interface platform and spend time practicing to avoid potential pitfalls. When used appropriately and judiciously, Web-TDIs can be a convenient and cost-effective way to achieve research objectives. | Q



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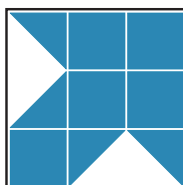
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# Increasing our brainpower

## Using neuroscience effectively

**E**rik's book illustrates both the complexity of neuroscience as a field and the crucial implications it has for brand owners as they seek to make their brands more desirable to consumers and win in the marketplace. It is, therefore, unsurprising that marketing and advertising conferences now incorporate a strong neuroscience emphasis, and many recent papers and articles maintain that scientists' increased understanding of the brain will change marketing and the way we measure it. *Buy-ology*, by Martin Lindstrom, makes similarly strong claims: that neuroscience will play a revolutionary role in research and marketing in future. As a result, many marketers challenge accepted modes of brand and advertising development and research on the grounds that "neuroscience says" that what we've done before is wrong.

Similarly, we now see neuroscience being cited in many brand and advertising decisions. The phrase "neuroscience proves..." is increasingly being used to justify a new model of advertising response, brand strategy or advertising research tool (though it's often useful to examine just how much actual proof follows such statements). Most crucially, over the last few years there has been a blossoming of neuromarketing agencies who claim to deploy the methods used by neuroscientists to answer marketing questions in a way that conventional research cannot.

So we'd be forgiven for believing that traditional qualitative (focus group-based) and quantitative (survey-based) techniques are not sufficient anymore and that we need to turn to the methods used by cognitive neuroscientists, such as brainwave measurement (EEG), brain scanning (fMRI) and other biometrics, to really understand how consumers will respond to marketing.

However, despite all the discussion about neuroscience, the vast majority of brands and ads are still researched using traditional methods. Likewise, over the last few years, papers have periodically emerged that question the value of the whole area. So who's right? Are we poised at the start of a revolution or is neuromarketing overhyped wishful thinking?

### The current state of play

Our firm, Millward Brown, conducted its first neuroscience project in 2004, and since then we have reviewed all the key methodolo-

## snapshot

In an excerpt from *The Branded Mind*, a new book on neuroscience research by Erik du Plessis, Millward Brown's Graham Page offer his firm's assessments of neuroscience techniques and how to get the most out of them.



By Graham Page

*Editor's note: This article is a chapter excerpt from The Branded Mind, a new book by Erik du Plessis. This chapter was written by Graham Page, executive vice president, consumer neuroscience, Millward Brown. The book is published by Kogan Page (www.koganpage.com). To view this article online, enter article ID 20110506 at quirks.com/articles.*





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gies available in this area, working with our clients, neuromarketing practitioners and academics. Our experience is that marketers are increasingly turning to neuromarketing and they will continue to do so more and more. But this has been a gradual process for several reasons:

- Marketers are rightly being cautious. Neuromarketing is new and to some people controversial. So they are working with partners who they trust to do their homework before adopting more widely.
- There are still significant practical hurdles. The technologies are not available everywhere, and the logistics of brainwave measurement or brain scanning are not trivial. Testing robust numbers of participants is often expensive - or worse, not done.
- The extreme claims of some of the early practitioners in the field have inspired some skepticism.
- Many of our clients believe their work in this area has the potential to generate significant competitive advantage and so are understandably coy about sharing too much publicly.
- Most marketers quickly realize that neuroscience methods in isolation can be hard to interpret and don't stand alone.

This last point is crucial. Over the last six years we have examined all the main techniques in the area and compared them to the existing qualitative and quantitative work we do to ensure a realistic perspective on what the science can and can't say. We've seen that there is clear and significant value in certain neuroscience methods, but only when used alongside existing methods rather than as a replacement and only if interpreted with care by people with experience in the field. To this end, in 2010 we created a dedicated neuroscience practice to ensure that, as a business, we would implement neuroscience-based approaches in a realistic manner that added to our insights about consumers.

### Applied tests

When deciding which methods to use, we have applied the following tests:

- Does the method tell us something meaningful about brands or marketing?
- Does the method tell us something we don't already know (and enough to justify the costs)?
- Is the method practical and scalable?

There are neuroscience-based

methods that meet all three of these tests. These are: implicit association measurement, eye-tracking and brainwave measurement.

### Implicit association measurement

While not strictly speaking a neuroscience technique, what it shares with more biometric methods is the principle of inferring consumers' responses rather than asking direct questions. The approach measures consumers' reaction times or accuracy on tasks that are systematically biased by their reactions to brands or ads. At first this sounds strange, but the approaches capitalize on the way the brain stores information - as a network of connections rather than isolated units. It is for this reason, that, for instance, thinking about the idea of a "doctor" means you will tend to respond faster to a related idea like "nurse" than an unrelated one like "plumber." Similarly, if you feel positive you will tend to respond faster to positive words and slower to negative ones, but this is reversed if you feel negative.

Implicit association methods have a long history of use in cognitive psychology to infer unstated processes and responses, especially in researching socially sensitive areas, such as people's biases towards different races or genders. They offer market researchers a window to the raw ideas and feelings stirred up by brands and ads, prior to any filtering for sense or social desirability, which still may play a role in shaping consumers' responses.

We have used these methods in a variety of markets and with a range of clients to understand the implicit associations activated by brands, by ads and by hard-to-discuss stimuli such as brand logos.

For instance, we recently used this approach to research an award-winning Australian TV ad for Allen's (a confectionery brand). The spot featured a giant doll walking the streets, blowing bubbles which turn into the product and rain down onto a crowd of children and parents. The ad was designed to reinvigorate the brand, which, although a long-time favorite, had lost some relevance

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and presence in the market, by reminding consumers of the magic of childhood. The ad proved to be hugely engaging but the implicit association test identified that the ad worked in a way somewhat different from that expected. While explicitly consumers played back messages of fun and happiness, implicitly, the spot also communicated irresistibility and playfulness.

Also, while explicitly the ad was not directly persuasive, the implicit measures revealed that it strongly reawakened the emotional connection to the brand. Therefore rather than being a simple nostalgic look at a trusted favorite, the ad functioned very strongly as a modernizing ad while highlighting the playfulness of childhood and reinvigorating the emotional resonance of the brand.

Similarly, in Poland we recently conducted some logo research for a financial services client. Logos are a topic that consumers find difficult to talk about as they are not usually subjects of much thought but they are full of nuance and symbolism.

Although the results from explicit ratings correlated with results from this implicit test, the implicit method pulled out a much clearer winner, suggesting that this is a useful approach for this type of research.

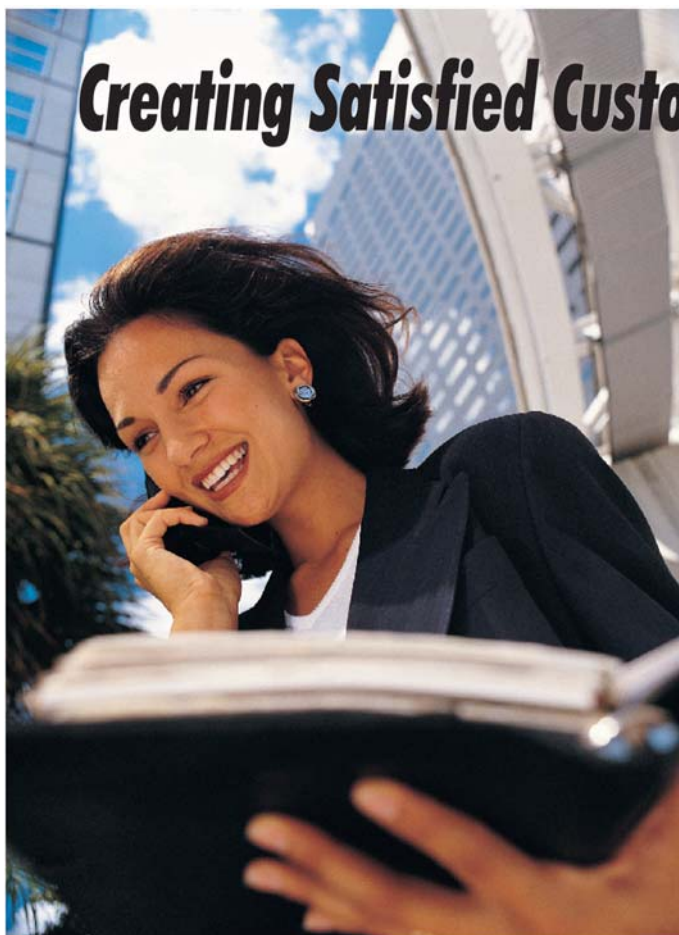
On the whole, we've found this type of approach allows us to see in more depth whether a brand is achieving its desired positioning, or if a campaign or logo has the potential to shape a brand's perceptions in the intended way.

#### **Eye-tracking research**

Eye-tracking technology is now widely used, partly because it has become simpler to implement and cheaper than in the past. The benefits are clear: eye movements indicate the focus of visual attention with more detail and accuracy than self-reported answers. However, the method doesn't reveal why a particular area of an ad catches the eye or how people respond to it, which is why it can be difficult to interpret in isolation.

We have used this approach

in a number of markets and have found it a useful additional diagnostic technique that helps explain advertising or packaging performance as measured via conventional survey methods. In one example, we tested a particular scene from a well-known Skoda Car ad in which the car is built entirely from cake. This ad was shown to be powerfully branded to Skoda in our Link survey work and eye-tracking helped illustrate why. Visual attention was clearly focused on the Skoda badge when it is affixed to the front of the cake-car. However, this contrasted with dispersed visual attention at the end of the ad when the Fabia nameplate is mentioned, which was a useful diagnosis of the weaker nameplate-branding we saw in the survey results. In a similar project for RoC skincare, we found a powerful illustration of a communication barrier due to misdirected attention during a key scene. Using this information the client was able to re-edit the ad and generate a much stronger final film.



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## Brainwave measurement

Brainwave measurement is perhaps the most complex area in neuro-marketing, due to the variety of systems and companies offering them. Millward Brown conducted one of the first large-scale commercial EEG projects in the U.K. for the Newspaper Marketing Agency in 2005. Since then we have partnered with U.S.-based EmSense to integrate EEG and other biometrics with survey tools.

Using a headband with dry electrodes, EmSense collects EEG and secondary biometric data, such as heart rate, respiration, blink rate and body temperature. This method not only makes the equipment less intimidating for participants and simpler to apply, we have found it is also more cost-effective than conventional EEG equipment, which tends to use full-head skull-caps and gel to make connections with the scalp. Consequently, it enables full quantitative testing (e.g., samples of over 100 versus the 20 or so typically used in conventional EEG) and so allows cross-analysis with explicit questions and metrics.

We have therefore deployed this technology in several countries and it has become an important component of the ad development work that we do. This is because brain-

wave data can provide a powerful diagnostic of people's reactions to an ad or brand experience on a moment-by-moment basis, revealing responses that are so quick or fleeting that respondents may not even remember them, let alone be able to objectively report them.

This can also be particularly useful in markets such as India, China and Latin America, where the tendency for research respondents to be positive on surveys is stronger and where we may miss some negative responses as a consequence.

We conducted Link survey-based research on the Dove "Evolution" film - an engaging, emotionally resonant and powerful communicator of the core idea of encouraging real beauty. The EmSense data illustrates the journey consumers take to get to that set of responses and which creative elements drive this response. While the model is being made-up, positive emotion actually rises (which is not something viewers report verbally). There is also a crescendo of both positive emotion and cognition at the moment it is revealed that the film is about the making of an ad; as understanding blossoms and the cleverness of the idea is apparent. This is crucial to the overall positive reception the

film generates. However, it is also clear that as the implications of this moment sink in, positive emotions decline as the point of the ad is considered, which is what gives the communication such power.

Work using this form of EEG with other clients has helped reveal and address issues such as weak communication, branding or disengagement with key protagonists. It has also evidenced which elements of an ad should be retained in cut-downs of long-form ads and which elements to pull out for use in other parts of campaigns.

While we have focused on these three approaches, it is important to remember that there is no one-size-fits-all neuroscience-based technique; depending on the individual client issue one approach will be better suited than another. For instance, we have used fMRI with the Royal Mail for a project about the effect of physical versus virtual media in marketing effectiveness. However, it is limited in its scalability so we have used it less extensively than the other methods outlined above. It is important, however, that marketers use the right tools for the issue they face, rather than treating neuroscience as a single entity and trying to use one tool to do everything.

## No substitute for talking to people

It is a misconception, and a scary one, that marketers will be able to (or want to) just measure people's responses to brands via electrodes and work out what they really want. There is still no substitute for talking to people, as this is the only way we can understand the whole meaning of their relationships with brands and products. The point of market research is to generate insights that lead to more desirable brands, rather than to use the latest methods for the sake of it. For this reason we don't believe neuroscience methods can ever replace the need for conversation with consumers, though we do believe they can be a powerful complement to it. In addition, on a practical level, survey-based techniques have been shown over many years to have a

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demonstrable link to consumer behavior - and such linkages are still being forged for neuroscience methods.

### Turn their backs

We don't believe that marketers need to turn their backs on tried-and-true research techniques in favor of neuroscience, but we do believe that neuroscience can offer an additional perspective on consumer responses and motivation. Therefore, the approach we've taken has been to roll out neuroscience-based methods alongside - and integrated with - existing tools, rather than as a replacement. Each method is used when it will add value and when it is relevant to the client issue.

When should neuroscience-based techniques be used? Neuroscience-based techniques will tend to add the most value under certain circumstances:

**Dealing with sensitive material.** This is when qualitative/survey methods are most vulnerable to distortion, so methods that don't rely on explicit questions can reveal unstated attitudes more effectively.

**Dealing with abstract or higher-order ideas.** Consumers face challenges when trying to talk about the often complex ideas at the heart of many brands' positioning. Implicit association methods, in particular, can be

useful at probing for ideas that participants think sound strange or overblown on a survey or which they might discount as irrelevant when answering explicit questions.

**Probing for transient responses to ads or brand experiences.** Consumers are great at talking about the gist of an ad or brand or experience but they may not be able to articulate all the steps in the process that got them there. Biometric methods, such as EEG, can add value in pinpointing the emotional or cognitive highlights and low points in a piece of creative, or the focus of attention, which can provide useful insights for developing more effective campaigns for brand experiences.

**Giving more detail on consumers' feelings.** Feelings can be difficult for people to talk about, though qualitative and survey-based methods can help people do this. However, neuroscience methods can add an additional level of detail here, about the depth of emotional response, the timing of these responses and the elements of an ad or brand that are driving the way consumers feel. Given the importance of emotion in motivating behavior, these methods have a role to play here.

In terms of specific research applications, the differing advan-

tages of each method mean they lend themselves to different areas of research. Implicit association measurement is well-suited to brand strategy work, product testing, concept testing and assessment of communication from marketing campaigns. Eye-tracking is strong on in-store and online marketing optimization and advertising development. Brainwave measurement adds greater detail in these areas, especially regarding emotional and cognitive responses, and thus lends itself to advertising optimization.

### Best practices

Based on our experience researching and implementing these methods, we suggest the following best practices to get the most out of neuroscience:

**Be critical.** The technology can be alluring, but the same questions (detailed above) that would be asked of any conventional research technique should be asked of these methods. Ask for proof.

**Look for experience.** This is a complex area, so familiarity with the approaches and a scientific perspective is important to understand what is claim versus reality and when neuroscience adds most value. Likewise, experience in drawing together neuroscience and conventional research is key to maximizing the value.

**Integrate.** Neuroscience-based methods do not reveal the inner truth; rather they provide additional perspective on consumers' responses to brands and marketing, which needs interpretation in the light of other information. A holistic approach reveals greater insight than conventional or neuroscience methods alone.

### A standard tool

Our experience suggests that in the future, neuroscience-based research will be a standard tool in the researcher's toolkit but it won't be the only tool. Neuroscience techniques on their own can't fully explain consumers' responses. The most complete understanding will come from integrating information rather than looking at one perspective alone and using the right tool at the right time. | Q



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# FAQ: neuromarketing research

This is the first in a series of articles dedicated to giving researchers a quick overview of current or newsworthy industry trends and practices. We'll keep things brief - our goal is to touch on some of the main talking points surrounding a topic in about 1,000 words. If you have topic you'd like to see covered, please e-mail me at [joe@quirks.com](mailto:joe@quirks.com).

## Just what do people mean when they talk about neuromarketing research?

It's the use of an alphabet soup of techniques and technologies - EEG, QEEG, SST, fMRI, etc., plus facial coding and other biometrics - to measure consumers' physiological responses to stimuli. In the case of marketers, the stimuli are usually things like advertisements, Web pages, product packages and TV shows.

**EEG/QEEG/SST:** Electroencephalography, quantified electroencephalography and steady-state topography all involve the recording and analysis of the brain's electrical activity.

**fMRI:** Functional magnetic resonance imaging measures the changes in blood flow related to neural activity in the brain.

**Facial coding:** As the name suggests, facial coding measures facial muscle activity and typically uses a classification approach such as the Facial Coding Action System to gauge a respondent's emotional response to stimuli.

## What about stuff like eye-tracking?

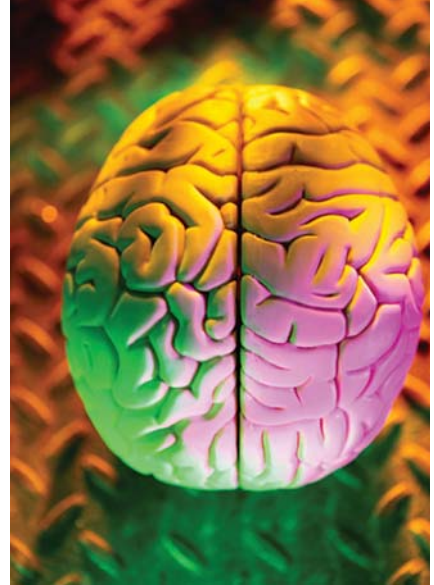
Many of the new crop of neuromarketing measurements incorporate "old" technologies like eye-tracking, heart-rate monitoring and galvanic skin response, which have been around for quite a long time (at least in technological terms), so what's old is new again.

## Why neuromarketing research?

### Why now?

From a business perspective, most likely it has to do with the technology for some of the techniques becoming inexpensive enough to allow several vendors to enter the market with competing products.

From a marketing and research perspective, it seems like a natural response to the belief that traditional or non-biometric types of



By Joseph Rydholm

## snapshot

In the first of a new series of quick-reference guides to current research topics, *Quirk's* Editor Joe Rydholm takes a look at neuromarketing research - who's using it, how and why.

*Editor's note: To view this article online, enter article ID 20110507 at [quirks.com/articles](http://quirks.com/articles).*



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marketing research are incapable of or ill-suited to capturing consumers' unconscious motivations. Human beings don't understand their true motivations, this line of thinking goes, and therefore asking them directly (or even indirectly) about why they like an ad or why they buy one brand of shampoo is, at best, misleading and, at worst, pointless. Better to hook them up to some measuring devices, show them some stimuli and analyze their brainwaves or gaze path or pupil dilation.

And, with all the talk of engag-

ing consumers on emotional levels these days, being able to peer into their innermost reactions holds a strong appeal for certain marketers.

**Who's using these techniques?**

You name it. In terms of categories: retail; household and personal care products; food and beverage; entertainment; government/political; pharmaceuticals, telecommunications; publishing; financial services. In terms of companies: Microsoft, PayPal, Google, CBS, Disney, Frito-Lay, A&E

Television, Cisco, The Weather Channel and Citi.

Some of the corporate sponsors of the Advertising Research Foundation's (ARF) NeuroStandards Collaboration Project include: Campbell Soup Company, Colgate-Palmolive, MillerCoors, GM, Dentsu, American Express, Hershey's, Chase, Clorox, Warner Bros. Entertainment and Starcom.

**What are they doing with them?**

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*With all the talk of engaging consumers on emotional levels these days, being able to peer into their innermost reactions holds a strong appeal for certain marketers.*

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**Does it work?**

In the right situations, the answer appears to be yes.

**What is the industry's take on it?**

The ARF's NeuroStandards Collaboration Project released its first output at the Re:think event in March (see this month's Trade Talk for a related article). While no grand pronouncements were made and the panel, perhaps unsurprisingly, deemed that more study is needed, Horst Stipp, executive vice president, global business strategy at the ARF had this to say in a press release: "Neuromarketing, when

done properly, is extremely valuable in providing learning regarding consumer attention and involvement and emotional reactions. But, the application of this complex science to marketing is still developing and there are a number of questions and concerns that surround the field.”

**What are some of the pros of neuromarketing research?**

As its heavy (and repeat) use by political campaigns attests, it seems to work well as a way to find the images that trigger desired responses in political TV ads. By extension, that means it likely could do the same for non-political forms of marketing.

And, to the point above about consumers’ unconscious motivations, for some marketers there is a welcome clarity to being able to see (ostensibly unfiltered) reactions to an ad or a new package. Instead of listening to consumers talk about their feelings, you get to see their feelings – though making sense of those feelings requires the aid of someone who is trained in interpreting these types of feedback.

**What are some of the cons of neuromarketing research?**

While the purveyors of the technology have no doubt gone to great lengths to make the measurement apparatus as unobtrusive as possible, the experience of watching a TV spot wearing a nest of sensors is nothing like plopping on the couch in your den. What effect does that have on viewers’ responses? Are they more self-conscious than they otherwise might be? Does the artificiality of the research setting taint the results?

Further, while the technology can indicate the presence of a reaction – positive or negative – it’s not always easy to more fully characterize the nature of that reaction. And, the connection has yet to be made between the brain’s responses and actual purchasing behavior.

**What’s the bottom line?**

While there is a lot of buzz around neuromarketing research, and a lot of hype about its capabilities,

as with most things of this ilk (or other trends like text analysis, social media or mobile research), rather than a wholesale replacement for all established forms of marketing research, neuromarketing techniques seem to be worthy additions to the researcher’s toolkit.

Marketers and researchers are all after the same elusive types of insights, the ones that indicate a consumer’s true feelings about or response to an ad, a product, an

experience. And there are many ways to capture those insights. It depends on the product or service, the audience or market being marketed to, the internal philosophies of the marketer’s organization and, of course, the size of the budget. If emotions do play a strong part in a consumer’s response to your product or service – as they do with political ads, for example – neuromarketing research may be worth investigating. | Q

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# Dipping a toe in social media analysis

## A report on the 2010 Globalpark Market Research Software Survey

Results from the seventh annual Globalpark Market Research Software Survey, designed and conducted by meaning ltd., show a research industry where there is considerable diversity of practice in relation to the technology used and the extent to which technology is leading innovation. Often, it is the larger firms that are more daring in the way they apply technology or embrace new technology. We reveal that social media research is still in its infancy, with more firms considering it or experimenting with it than are actually raising revenue from it. Yet, for an approach that has its roots in Web technology, the methods being applied by researchers in conducting and analyzing social media research are still pretty low-tech.

We also seem to be detecting peak, or close to peak, for the growth of online research, as, for the first time, growth predictions focus heavily on mobile research. And we reveal some surprises about the extent to which research companies are turning to non-traditional data sources, how rigorous research companies are about testing online and highly interactive surveys and the directions firms are taking with respect to the distribution of research data and findings to their clients.

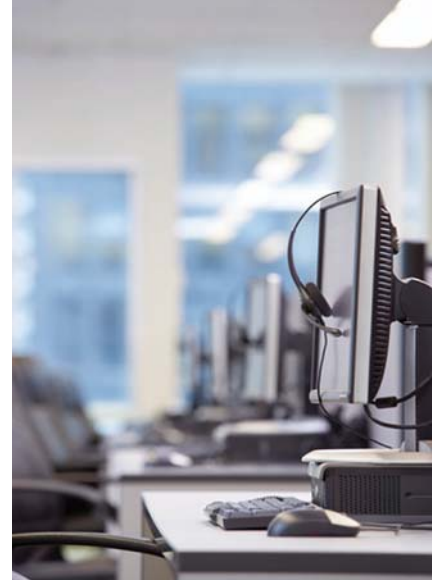
The survey was carried out among senior executives or business owners of market research companies around the world, in the final quarter of 2010. It consisted of an online questionnaire which took, on average, 15 minutes to complete. (The full study report can be downloaded at [www.meaning.uk.com](http://www.meaning.uk.com).)

The survey drew its sample from a wide variety of sources to ensure good coverage, and also included some participants from previous years. Individual named invitations were sent by e-mail to executives in senior positions within each company.

To avoid over-inclusion, only one response from each company was accepted. No quota controls were applied, but sampling was

carefully controlled to ensure that different countries are represented roughly in proportion to relative size of each market, as reported in ESOMAR's 2010 Global Report.

A response rate of 213 was achieved overall, with 79 from North America, 105 from Europe and 29 from Asia-Pacific. The survey is truly international, with contributions from 30 different countries. The response

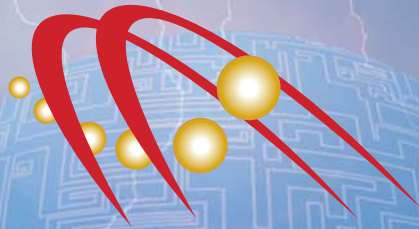


By Tim Macer  
and Sheila Wilson

### snapshot

This iteration of the annual survey of research software users added questions on social media usage and deployment of sample routers and found that CATI seems to be holding its own.

*Editor's note: Tim Macer is managing director, and Sheila Wilson is an associate, at meaning ltd., the U.K.-based research software consultancy which carried out the study on which this article is based on behalf of Globalpark. They can be reached at [tim@meaning.uk.com](mailto:tim@meaning.uk.com) or at [sheila@meaning.uk.com](mailto:sheila@meaning.uk.com). To view this article online, enter article ID 20110508 at [quirks.com/articles](http://quirks.com/articles).*



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rate was slightly down from previous years, and sits at 10 percent of the invited sample. Researchers are a notoriously difficult target group to research!

We are therefore especially grateful to those who made this research possible: all those who willingly participated in our survey; and, of course, Globalpark, who generously sponsored the 2010 survey and provided us with technical support for the fieldwork.

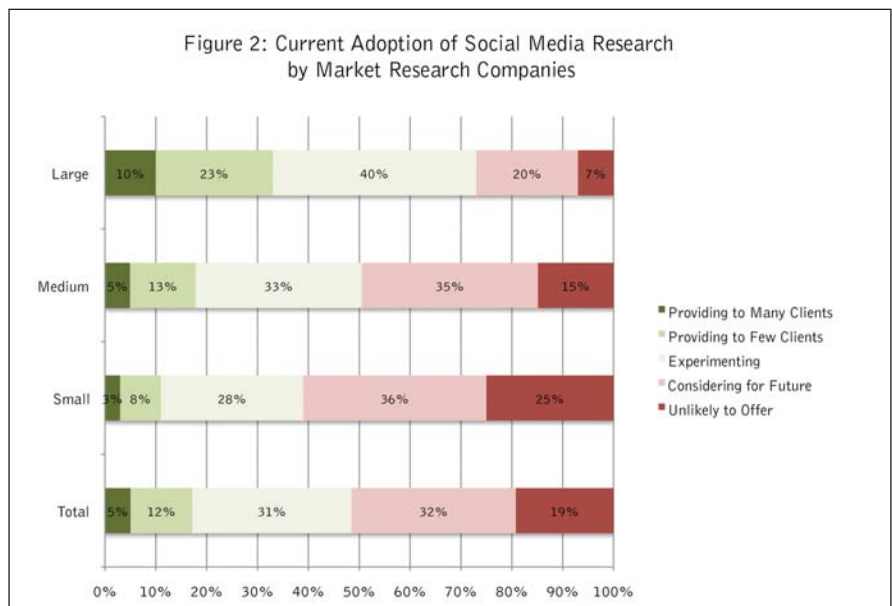
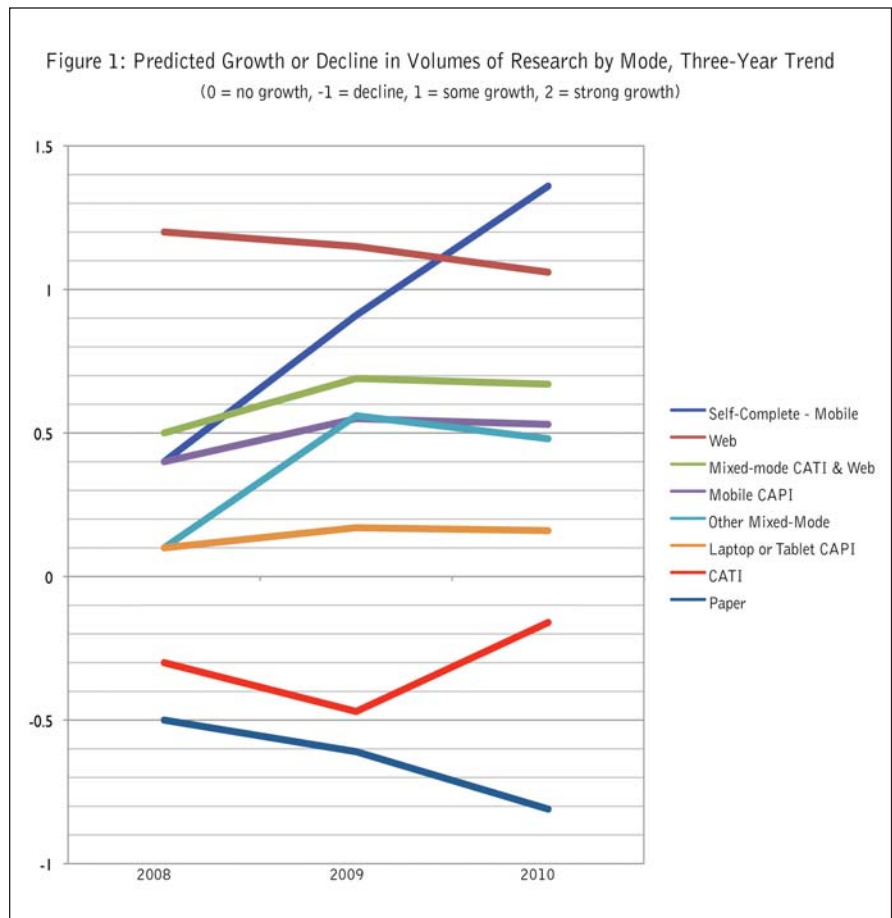
**Predicted changes in interviewing mode**

We asked respondents what changes they foresaw in the amount of work they would handle over the next three years in their quantitative research activities. We used a four-point scale, with 2 representing major growth, 1 modest growth, 0 for no change and -1 for any decline.

This is the first time, since first asking this question in 2006, that online research has been ousted from the top spot. That position is now held by mobile research (“self-completion with mobile devices”).

We must wait to see whether the industry’s expectations for mobile research are reflected in increased volumes. Mobile self-completion is still very much a minority mode - as was shown in another question, where we learned that just 7 percent of respondents said that their companies offered it. However, there may be a clue to the future of this technology: We found that a more substantial 17 percent of large companies are already delivering mobile research.

Predicted growth for other modes is much weaker - mixed-mode CAPI and Web, mobile CAPI and “other” mixed-mode all occupy a position midway between modest growth and no growth. Online research is still showing a modest growth score, but expectations have weakened compared to previous years as firms perhaps see conventional online research reaching its plateau. In other questions, we have found that Web research has accounted for just below 50 percent of research companies’



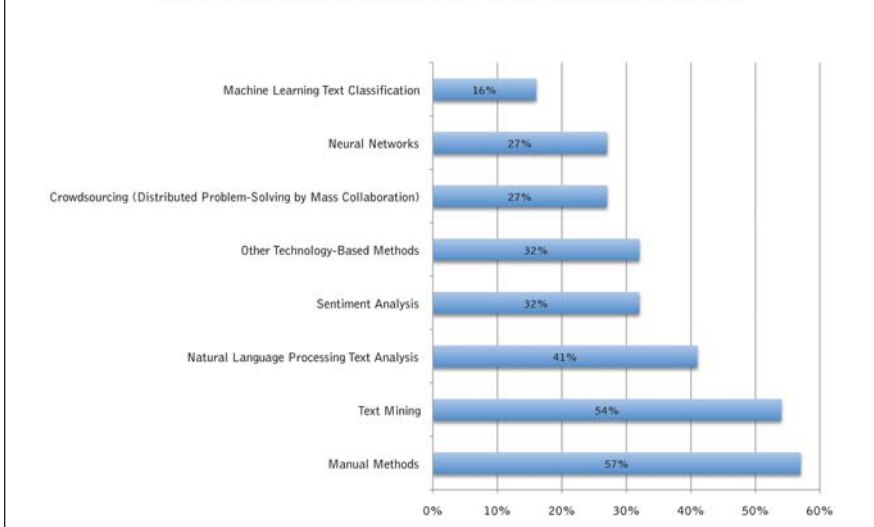
revenue since 2008 (47 percent in 2010), plus the number of companies offering it reached just over 90 percent in 2007 and has remained at that figure.

Paper, however, seems to be coming down off the other side of the plateau. Companies are predicting a decline, and this is borne out elsewhere in the survey, as participants also reported the actual

volumes achieved for paper were 13 percent. This represents a drop of one-third compared to the 21 percent of quantitative revenues recorded in the 2006 study.

CATI is proving to be more resilient than many industry commentators have predicted. Our participants put CATI’s fate slightly into the decline category, but the average scores net out

Figure 3: Methods Used to Analyze Social Media Research Data



at -0.16, with 0 representing no change and -1 representing decline. This is again mirrored in the actual reported volumes which have remained stable at around 25 percent of revenues since the 2006 study.

### Social media use

As market research has been buzzing with ideas and opinions on social media research throughout 2010, we decided to include a few questions in our survey to explore the topic.

Given the recent arrival of social media research, it is not surprising that only 17 percent of companies (37 companies in total) say they are practicing it (Figure 2), indicating the method is still in its early-adopter phase. Volumes are low too: Social media research accounted for 5 percent or less of earnings for 24 of those 37 firms (roughly two-thirds of them) but some specialists appear to be doing much more, with seven of the 37 firms earning between 15 percent and 50 percent of their revenues from it.

Across the whole spectrum of research firms, there is clear interest in this method, with a further third (31 percent) currently experimenting with it and another third (32 percent) considering it for the future.

It is the large firms that are further along the adoption curve and, indeed, we have found throughout this study that large companies

appear to be more technologically innovative. Thirty-three percent of large research companies already provide social media research, against 11 percent of small firms.

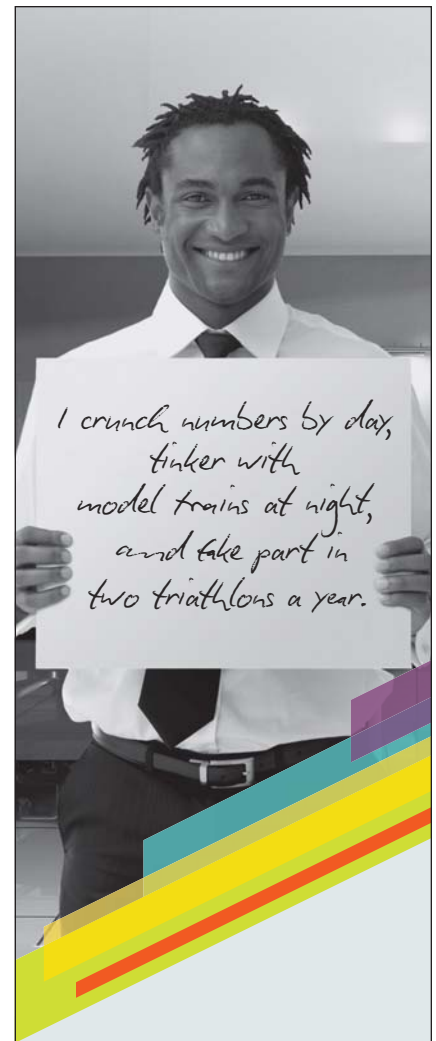
There is a surprisingly large number of companies (19 percent) who say that they are unlikely to offer research using social media.

In another question, we asked whether social media research was an alternative to existing research methods, a new method in its own right or none of these. Sixty-six percent view it as a new research method in its own right; 14 percent see it as an alternative to qual; 5 percent overlap it with quant and 2 percent view it as a desk-research replacement. A sizeable 13 percent did not see it as belonging to any category of research. However, among the large research firms, almost twice as many (27 percent) see it sitting alongside qualitative research.

### Social media analysis

Social media research creates its own unique challenges when it comes to processing, analyzing and interpreting the data: The task is almost like reviewing hundreds of groups or depths you never attended. We asked how the information gathered from social media research gets analyzed and offered a list of eight methods we'd heard mentioned in presentations or articles discussing the phenomenon.

As shown in Figure 3, a substan-



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Figure 4: Sample Router Use by Region and Company Size

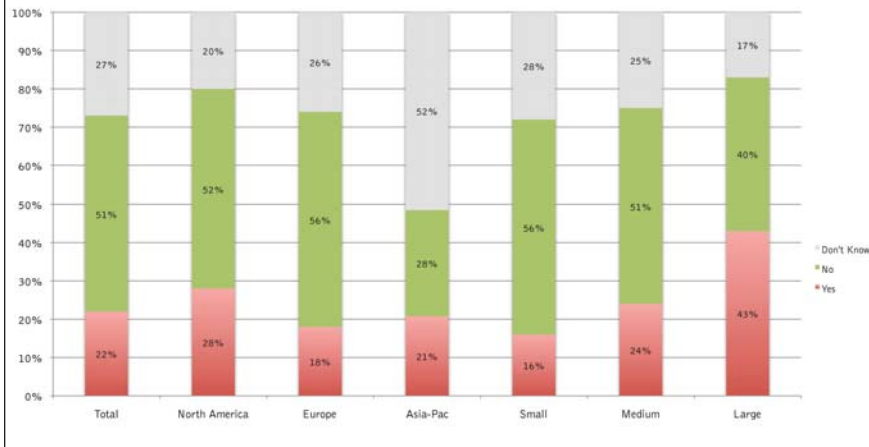
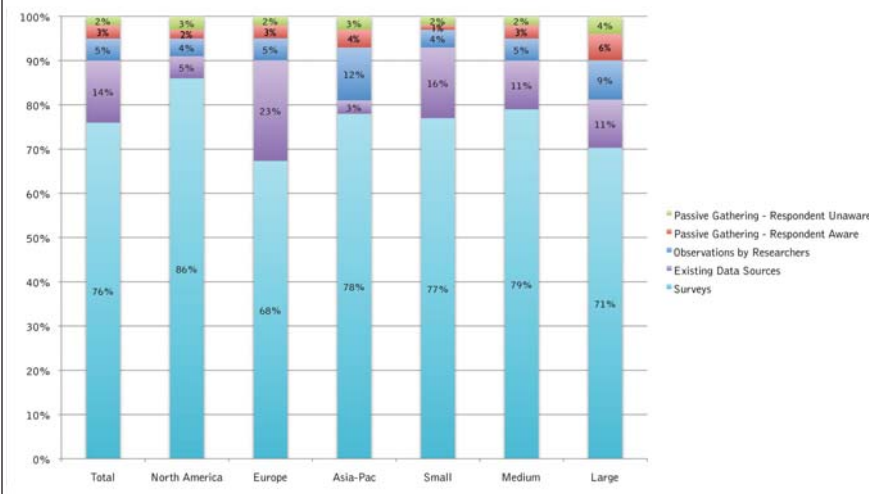


Figure 5: Current Share of Different Data Sources Used by Market Research Companies



tial majority of those conducting social media research (57 percent) use manual methods for their analysis, which exceeds all others in popularity. Closely behind this comes text mining, a technologically-assisted method that still requires a high degree of manual input, with 54 percent using this.

Other more technological methods are fairly widely used, but there seems to be scope for researchers to reduce manual effort and improve their sifting through large volumes of unstructured textual data by adopting more technology. It appears to be an area where best practices are still being established. Given the affinity already observed between social media research and qualitative research, there may also be an element of resistance or even

outright skepticism in applying technology that goes beyond simple word searches - and this has been the case for many years with more conventional quant.

### Sample router use with online surveys

For the first time this year, we asked companies about their use of routers with their online surveys (Figure 4). We explained within the question that routers allocate participants to surveys when they respond to an invitation.

It seems to us that the use of routers is a technology area that many companies have yet to fully explore. Over 90 percent of market research companies offer online surveys, yet only 22 percent use routers, even though they have

great potential to increase response rates and attract more people more quickly within hard-to-reach groups.

Many of our participants were unaware of the extent to which their companies deploy routers. Part of the reason for this lack of knowledge is perhaps because technology companies are dragging their feet on router development - half (50 percent) of the respondents who use routers use an own-developed solution, and that is the most commonly used router technology. Only 24 percent use a router that is a feature within survey software and 9 percent use standalone router software, which suggests either a lack of availability or quality.

Again, as seems to be always the case with new technologies, large companies are stealing the march - 43 percent of large companies use routers compared with 16 percent of small companies.

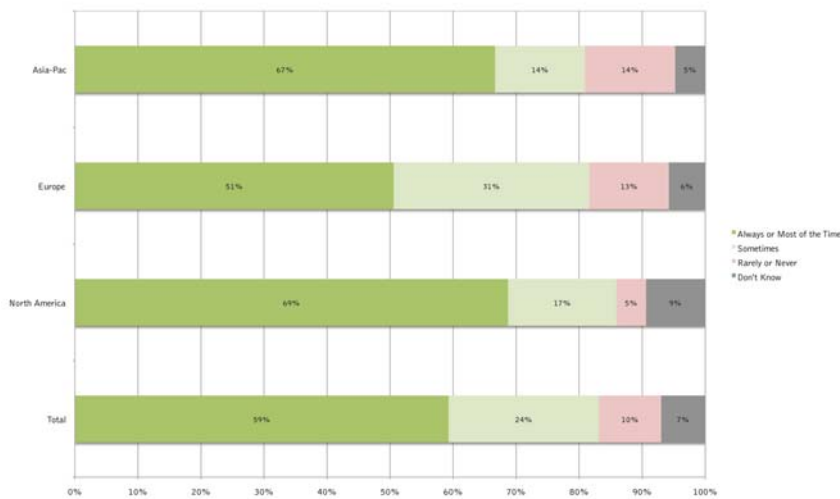
### Data sources

Some leaders of the largest global research companies are saying they see a future in which market research is less dependent on conventional respondent surveys and routinely makes use of existing data or passively-gathered data. We asked market research companies what proportion of their data is derived from surveys and from other sources. In this question (Figure 5), we asked firms to report the proportion of data that derived from each of five named data sources in their revenue-based research activities. Globally, it appears that 76 percent of data used by market research companies is from surveys, so a quarter of the data is not from surveys.

There are large regional variations. Europe is the largest user of existing data sources, with 23 percent from this source alone, and a surprisingly low reported use of survey data, at 68 percent. The use of observational data is much higher in Asia-Pacific: 12 percent against the global total of 5 percent. North America, unusually, is lagging behind, with 86 percent of its data reliant on respondent surveys.



Figure 6: The Extent to Which Market Research Companies Conduct Usability Testing, by Global Region



Passive data gathering, both where the respondent is and is not aware, are very much minority sources, and together account for just 5 percent globally. These figures are somewhat higher among large firms, which report double the amount for both sources. However, this is one area cited by many industry commentators to become increasingly important and offers a way out of the respondent-refusal challenge. Either way, the survey reveals an overwhelming dependence on conventional, newly collected survey data, though with some perhaps surprising inroads from other sources.

### Usability testing

One consequence of researchers adopting more interactive components within their online surveys, such as questions where participants have to drag and drop or click on particular hot spots, is that the exercise becomes more complex and less obvious to the survey taker. Poor question design can lead to confusion among respondents and result in incomplete or even erroneous data being collected. Simple design considerations such as the starting position of an interactive slider can have a dramatic effect on the eventual average scores collected. The only reliable means to control for this high-risk source of error is to perform specific usability testing, similar to the

tests software designers apply to new interfaces.

We had a suspicion that research firms, in the pressure to get the next survey out, were being less than rigorous in the level of usability testing they perform, when working with these kinds of interactive components. So we threw in a few questions about quality-control processes that firms apply to their new surveys.

Overall, firms do test their surveys (Figure 6). In a question not charted here, all firms named one or more testing processes that they routinely subject their surveys to: 85 percent of researchers always test their own surveys and 70 percent claim to routinely pilot survey instruments prior to launch.

Our suspicions on the interactive components were confirmed when we asked about testing procedures for these. The question charted in Figure 6 was asked only of those firms that field surveys with interactive components: 19 percent of our sample don't do these kinds of survey. Specifically, we asked: "If your survey includes interactive components such as drag-and-drop or questions deployed in Flash, do you perform usability testing on these components?" and provided the four answer options shown in Figure 6.

It is just 59 percent of firms that "always or most of the time" apply some form of usability tests.



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Figure 7: Proportions of Sample Volumes by Region and Company Size

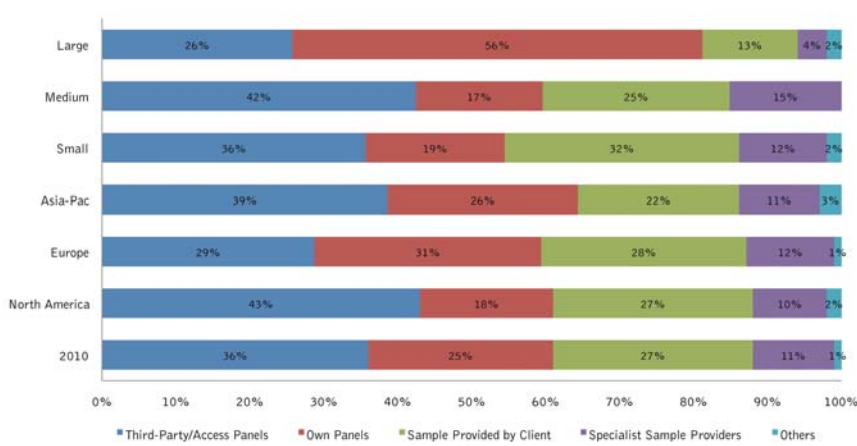
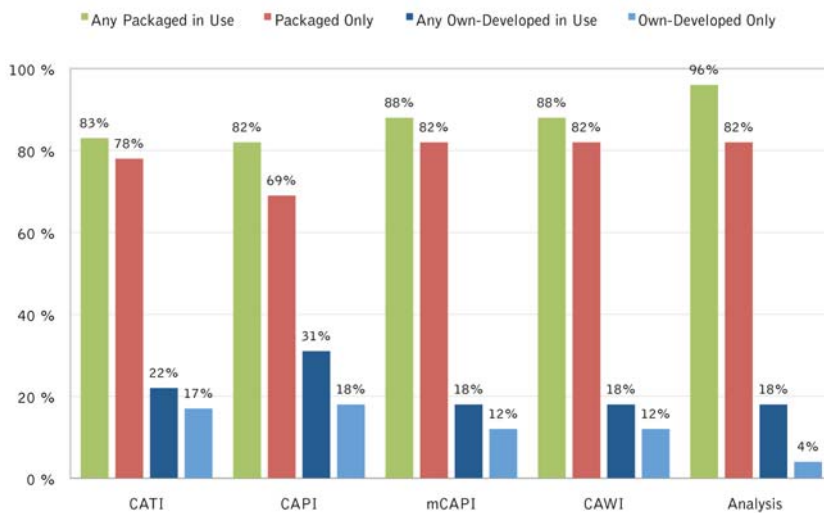


Figure 8: The Use of Packaged and Own-Developed Software, by Application



Although overall, 83 percent of companies claim to “always” or “sometimes” conduct usability testing, we are astounded by the candor of the 10 percent who rarely or never conduct usability testing and are alarmed by a further 7 percent who had no awareness of whether usability tests were performed.

Those in Asia-Pacific and especially North America seem to be somewhat more assiduous at usability testing than in Europe, where routine testing is recorded by just 51 percent of firms – a worryingly low level of quality assurance, given the known risks to the data.

### Online sample sources

This question looks at the proportion of sample that comes from

each source and is one we have featured most years since 2006.

It is striking that large companies make far greater use of their own panels than others. This is perhaps to be expected due to the cost, and also the scale of utilization required to make an in-house panel economically viable. This has the effect that large companies are also much less likely to call on access panels. The observation that large companies rely on samples provided by their clients much less than the smaller firms is not as easy to interpret.

It is also clear from the chart in Figure 7 that firms in North America are much greater users of access panels and have not developed in-house panels as much as

in other parts of the world. Access panels have been around a little longer in the U.S. than elsewhere. There may also be greater willingness to outsource in North America than elsewhere, where it is customary for quite large research companies to buy in most of their fieldwork and even outsource much of their DP – a model favored much less in Europe. But you may have a better idea.

### Software in use

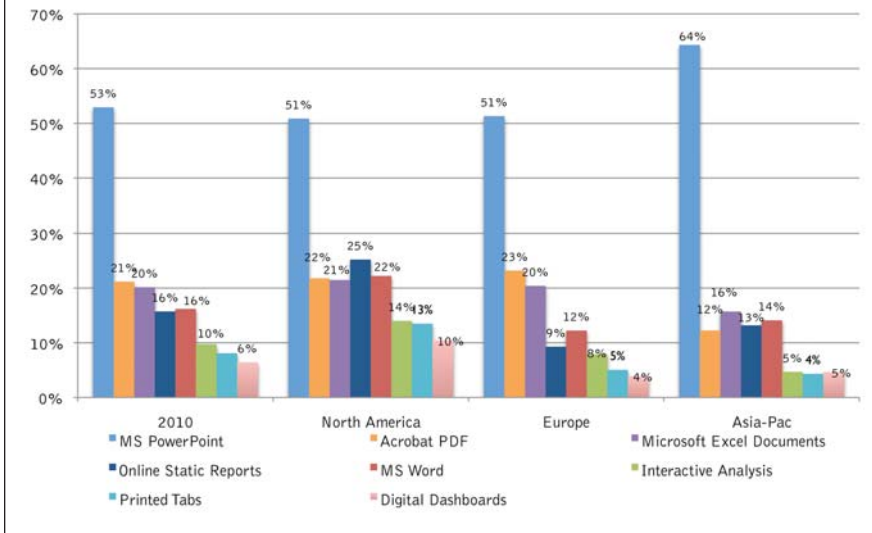
Every year, we ask respondents whether they use packaged, own-developed software or both (Figure 8). We are constantly surprised by how many market research companies use own-developed software. In many cases, they only use the software they’ve written themselves.

There are literally hundreds of companies developing software specifically designed for market research, yet many market researchers still see the need to develop their own. Why are the off-the-shelf packages not fulfilling their needs? Obviously no one company is going to find a package that precisely meets all of its needs but with all that choice, we find it hard to believe that the off-the-shelf packages cannot sufficiently meet the needs of most of companies, when balanced against the cost and risk of developing your own solution and then keeping it up to date.

For some reason, for CAPI, many companies seem to double up, with both an own-developed solution and a bought-in product. This is not the case for mobile CAPI and we are not sure why there is a difference in these two applications, since many of the commercial software packages on offer support both laptop and mobile CAPI. Mobile CAPI is a newer method and may be attracting newer entrants. Elsewhere in the study, it is clear that mobile CAPI has gained traction across the world, including North America, whereas large-format CAPI is much less prevalent in North America.

With analysis software, you

Figure 9: Share Distribution Modes Used to Deliver Projects, by Region



might expect to see more own-developed software than in data collection, because it is in the analysis and interpretation that market research companies will try to differentiate themselves. This is not borne out by any greater observed use of custom software in the analytical process. What is different is the very low number (4 percent) who only use custom-developed software. But then, who doesn't have Microsoft Excel on their desktop, and which market research company does not have someone, somewhere, using IBM SPSS Statistics?

**Distribution methods**

Each year we look here at the percentage of projects that use each type of client deliverable.

It is instantly clear from the chart in Figure 9 that PowerPoint continues to dwarf any other distribution method. However, a more interesting observation is that many distribution methods that are relatively rare in other parts of the world are commonplace in North America. Intriguingly, this applies to both technologically-advanced methods and more traditional low-tech techniques. For example, digital dashboards are used for 10 percent of projects in North America compared with 4 percent and 5 percent in Europe and Asia-Pacific; but also good ol' printed

tables are provided as a deliverable for 13 percent of North American projects compared with 5 percent of those in Europe and 4 percent in Asia-Pacific.

Indeed, many of the bars in the North American chart are higher than for Europe and Asia-Pacific, suggesting that North American market researchers are more versatile with the deliverables they are providing to their clients than elsewhere in the world.

Disappointingly for technology champions, we have seen little recorded change in the adoption of the more technologically-advanced distribution methods over the years. Interactive analysis has remained at close to 10 percent since 2006. We may even have a situation where PowerPoint is increasing its vice-like grip: 48 percent of projects were delivered on PowerPoint in 2006. In 2010 this had crept up to 53 percent, 51 percent in Europe and North America.

The good news from 2010, certainly for the environment, is that there is a definite worldwide downturn in the use of printed tables as a deliverable. This must also project a more forward-looking image for market research. In 2006, 23 percent of projects used printed tables as a delivery method whereas this has now dropped to 8 percent. There are probably few clients who will mourn their passing. | Q

*I make decisions based on data, chair three committees, and love watching my grandkids play football.*

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## Survey Monitor

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preferred by most patients. For more information visit [www.pewinternet.org](http://www.pewinternet.org).

### Digital couponing still gaining ground

Coupon distribution in the U.S. increased 6.8 percent in 2010 and more coupons were distributed than ever before, with digital coupons outpacing their newspaper counterparts approximately six to one. But the majority of digital couponers are doing more than just scraping by. Users of digital coupons have higher household incomes and are better educated than users of newspaper coupons and the general population overall, dispelling the perceived low-brow stigma of couponing.

The consumer who prints digital coupons has an average household income of \$105,000, a 26 percent higher income level than the U.S. average, according to a report from Coupons.com Incorporated, Mountain View, Calif. Adults with household income of over \$100,000 are twice as likely to have redeemed coupons printed from an online source than adults with household income less than \$35,000.

Thirty-six percent of those who use digital coupons have a college degree, compared to 28 percent of those who use newspaper coupons and 26 percent of the general populace. Also, adults with college degrees are almost twice as likely to have used coupons in the prior six months as those who didn't graduate from high school.

Cereal was by far the most popular coupon category in 2010, followed by yogurt (No. 2), refrigerated dough (No. 3), portable snacks (No. 4), and vegetables (No. 5). Baby products, including bottles, car seats and diaper pails, also topped the list at No. 6, followed by soup (No. 7), air, rug and fabric care (No. 8), cheese (No. 9) and lunch meats (No. 10).

For the second year in a row, Atlanta took the top spot on the most frugal U.S. cities list for 2010, according to Coupons.com's Savings Index. On average, regular users of Coupons.com in Atlanta printed or saved to a loyalty card more than \$1,000 dol-

lars in coupon savings from the site in 2010. That is almost twice the amount of savings in 2009, during which time Coupons.com users printed or saved to loyalty card \$531 in savings.

The top 20 couponing cities for 2010 are Atlanta (No. 1); Tampa, Fla. (No. 2); Cincinnati (No. 3); St. Louis (No. 4); Minneapolis (No. 5); Charlotte, N.C. (No. 6); Nashville, Tenn. (No. 7); Cleveland (No. 8); Pittsburgh (No. 9); Raleigh, N.C. (No. 10); Kansas City, Mo. (No. 11); Washington, D.C. (No. 12); Miami (No. 13); Dallas (No. 14); Oklahoma City (No. 15); Boston (No. 16); Denver (No. 17); Seattle (No. 18); Columbus, Ohio (No. 19); and Wichita, Kan. (No. 20). For more information visit [www.coupons.com](http://www.coupons.com).

### Global consumers agree gender equality is lacking

Global consumers acknowledge a discrepancy between how they feel gender equality should be and the perception of the way things actually are. According to research conducted among Shelton, Conn., research company Survey Sampling International's online panels in the U.S., U.K., Australia, China, Germany, France, Japan and Singapore, 70 percent of participants strongly agree that men and women should be paid the same wage for the same position but only a minority of participants agree strongly that women are equal to men in the workplace or that men and women have equal rights.

On a country level, respondents in Germany (37 percent) and the U.S. (35 percent) are most likely to strongly agree that men and women in their country have equal rights. France (16 percent) and Japan (8 percent) are least likely to strongly agree with that sentiment.

When examining the likelihood of voting for a female or male leadership candidate of equal abilities, almost half of Chinese participants state that they are more likely to vote for a male. It is also important to note that 42 percent of China's participants are just as likely to vote for either gender. Overall, 72 percent of participants across the eight countries are just as likely to vote either gender into a position of leadership when the candidates are equally qualified.

Among males, 26 percent are more likely to vote a male into a position of leadership while only 4 percent of males would be more likely to vote for a female. Females are more likely to vote a female into a position of leadership (11 percent) than males but like their male counterparts, ironically, females are more likely to vote for a male (15 percent) than for a female (11 percent). For more information visit [www.surveysampling.com](http://www.surveysampling.com).

### Travelers do their research; want convenience and value

Consumers take their vacations seriously - seeking advice, conducting online research and actively looking for deals. The modern traveler engages in an extensive research process, which often takes place over several months and includes numerous and varied information sources, according to Boston travel service firm Smart Destinations.

While travelers consult several sources, recommendations from friends (92 percent), online searches (70 percent), online reviews from other travelers (53 percent) and travel books (50 percent) are the most popular.

Travelers are proactively looking for value and willing to conduct the necessary research to get it. Additionally, travelers' definition of value is expanding. This value mindset goes beyond hotels and airfare and includes attractions, as well as savings in time and added convenience. Seventy-five percent of respondents actively try to get discounted admission in advance if there is a specific activity they want to do on their trip; 95 percent of respondents would buy admission in advance if they could skip the line at popular attractions; and 46 percent of respondents would pay more than the retail price to eliminate waiting in line.

Travelers also indicated that promotions and sales, specifically those offering a 25 percent discount or greater, are key purchase triggers. Ninety percent of travelers would pre-purchase attraction tickets for a 25 percent discount and 92 percent of travelers would buy bundled admission of three-to-five attractions at once for a 25 percent discount. For more information visit [www.smartdestinations.com](http://www.smartdestinations.com).

## Amy Shields, PRC on Expanding Knowledge

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Staying on top of the latest trends and modes of research is important. Having been in the marketing research industry for more than 25 years, I have attended hundreds of industry conferences and educational events. I've found the education offered by MRA to be superior to what I've received through other associations. By attending MRA conferences and webinars, I'm able to learn from others the strategies and insights they've gained through research. I take what I learn back to my team, we're able to use it day-to-day.

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**Amy Shields, PRC**  
Executive Vice President  
Advanced Focus  
*MRA Member Since 1995*



### Synovate expands marketing-mix modeling with m360

Synovate Marketing Management Analytics, a Wilton, Conn., research company, has introduced m360, an analytics solution designed to expand the insights delivered by marketing-mix modeling. The solution uses data from Reston, Va., research company comScore Inc. to provide a direct comparison of all media activities in a single analysis and aims to allow marketers to have a common ROI metric across traditional, digital, social and experiential media.

In addition to marketing-mix modeling, m360 is designed to help marketers determine their creative execution, consumer segment targets and media placement, including which digital tactics work best. For more information visit [www.mma.com/m360](http://www.mma.com/m360).

### New tool brings semi-DIY mystery shopping to small businesses

Corporate Research International (CRI), Findlay, Ohio, has developed a customizable, self-managed mystery shopping tool for small businesses, dubbed Eye on Your Business.

Designed exclusively to help small businesses implement and manage their own mystery shopping program autonomously, Eye on Your Business is controlled by the client, allowing users to decide what questions to ask, how many times per month to have the business evaluated and how much to spend.

Users are given access to a personal administration Web site where they can create their own mystery shopping form or choose one from a standard industry template, along with customized instructions for their mystery shops. Users then assign mystery shops using CRI's database of trained mystery shoppers from across the country and place an order for their

business to be evaluated using the form and shopper instructions they created. For more information visit [www.eyeyourbusiness.com](http://www.eyeyourbusiness.com).

### Mobile survey solution to collect data three ways

Raydar Research, Selangor, Malaysia, has debuted its mobile survey platform, ECHO, designed to distribute its online surveys on mobile phones and PCs simultaneously. ECHO can be used for data collection in three ways. First, pull surveys require a respondent to enter a survey link to launch the survey on their mobile device. Second, push surveys are surveys that are "pushed" to online panels via mobile e-mails or SMS. Third, ECHO also has an added function that can substitute pen-and-paper interviews with mobile phone surveys. No hardware purchase is required. For more information visit [www.raydarresearch.com](http://www.raydarresearch.com).

### ComScore announces global launch of Web analytics solution

Reston, Va., research company comScore Inc. has released comScore Digital Analytix, a solution in Web analytics intended to allow digital marketers and analytics professionals to conduct in-depth forensic research on site-level activity through the data analysis architecture. Additionally, digital marketers are expected to be able to map the behaviors occurring across their sites to the audience demographics of the people engaging in these activities. Powered by comScore's Atomix technology, Digital Analytix aims to offer a flexible reporting architecture; fast reporting and insights; an easy-to-implement design for publishers; campaign-level insights; cross-platform measurement; and a new interface. For more information visit [www.comscore.com](http://www.comscore.com).

### Compete tool pinpoints online audiences

Boston research company Compete has launched Compete Media Planner, an online measurement

tool for brands designed to offer a view of their online media and behavioral classifications. The Compete Media Planner aims to allow brands to map out thousands of sites where audience segments spend the majority of their time and deliver insights based on actual behavior of more than two million consumers. The tool also offers access to Compete Segments, an audience segmentation repository; media planning capabilities; defined segments; coverage of long-tail Web sites; real-time estimates of potential cumulative and duplicated audience across user-chosen sites as media selections are made; and custom views. For more information visit [www.compete.com](http://www.compete.com).

### EFM solution features new upgrades

Cvent, a McLean, Va., management technology company, has launched an enhancement to its Web survey solution, featuring upgrades designed to improve enterprise feedback management. Upgrades to the solution include a more robust presentation module with over 20 new chart types; new interactive question types, including sliding scale, gauge, drag-and-drop and grade options; enhanced integration with Salesforce.com that enables the mapping of question answers and scores to specific contact fields within Salesforce and the consolidation of data; question display updates; and a timed-survey option. In addition, e-mail marketing capabilities for sending survey invitations, reminders and confirmations are also available. For more information visit [www.cvent.com](http://www.cvent.com).

### Briefly

MarketVision Research, Cincinnati, has updated its Gateway consumer research centers at Universal Studios in Orlando, Fla., with enhanced wireless mobility and the use of iPads for consumer interviewing. For more information visit [www.marketvision.com](http://www.marketvision.com).

Opinionology, an Orem, Utah, research company, has launched

Real Customers, a service intended to build and manage verified customer panels. The custom panels are designed to match Opinionology's panel of survey research respondents with a company's internal customer list. After initial verification, the match also pairs Opinionology's profiling questions with information in the firm's customer database to provide a detailed understanding of each customer. For more information visit [www.opinionology.com](http://www.opinionology.com).

New Orleans research company Federated Sample has launched Fulcrum, a project management suite that aims to improve delivery, decrease project costs and create efficiencies by removing redundant and manual field management processes through a software-as-a-service model. The Fulcrum platform offers a project management infrastructure and routing solution designed to simplify the use of multiple sources while providing security and quality control. Fulcrum also provides reporting control and management tools. For more information visit [www.federatedsample.com](http://www.federatedsample.com).

Decipher Inc., a Fresno, Calif., research company, has developed an interactive dashboard intended to allow clients to view and manipulate market research data on the fly. The dashboard is designed to present data in any variety of combinations, track projects and create what-if scenarios. Data can be displayed via graphs, sliders, gauges and other visuals depending on desired complexity. For more information visit [www.decipherinc.com](http://www.decipherinc.com).

Vancouver, B.C., research company Techneos has introduced version 2.0 of its survey on demand application (SODA). SODA 2.0 includes barcode scanning capability and video capture for Android smartphones and tablets. For more information visit [www.techneos.com](http://www.techneos.com).

Interpret LLC, a Santa Monica, Calif., research company, has released InTime, a solution created for digital advertising effectiveness research. Developed to provide more accurate measurement of the effectiveness of online advertising, InTime uses ad-tagging technology to track ad exposure among representative consumer panels. Interpret matches each panelist to specific exposure to understand the impact of each ad unit/campaign on brand awareness, interest and sentiment. For more information visit [www.interpretllc.com](http://www.interpretllc.com).

Portland, Ore., research company Revelation Inc. has released its Activity Library, a collection of research activities intended to engage research participants and allow market researchers and marketing professionals to incorporate best practices and online immersive methodology in their research. Activities include warm-ups, welcome exercises, diaries, journals and more. For more information visit [www.revelationglobal.com/activitylibrary](http://www.revelationglobal.com/activitylibrary).

Miami research company Geoscape has released an updated version of its Geoscape Intelligence System platform, designed to help corporate operations and marketing departments improve distribution strategies, store operations, customer service and marketing campaigns. The update, called Next-Generation System, includes an integrated set of browser-based software, nationwide maps and data resources that offer access to consumer and market information, data visualization and analysis functions within a Web browser. A 30-day free trial version (Freemium Edition) is available at [www.geoscape.com](http://www.geoscape.com).

Oakland, Calif., Web publishing company dlvr.it has debuted its Social Demographics service, designed to provide insight into the demographic makeup of a company's social audiences. For each of a company's social networks, dlvr.

it provides a demographic profile of the audience, including percentage composition by gender, age, income, education, ethnicity and children in household. The service also compares each company's audience composition to the Internet average. For more information visit [www.dlvr.it.com](http://www.dlvr.it.com).

Portland, Ore., research company Rentrak Corporation has introduced time-shifted DVR ratings data within its StationView Essentials service. A range of playback choices will be available to Rentrak clients, including same day, one day, two days, three days, seven days and 15 days. For more information visit [www.renrak.com](http://www.renrak.com).

Kantar Media, a New York research company, has debuted RapidView, a media planning tool designed to create and analyze TV audience profiles based on shopping behaviors, including brand loyalty and product category usage. The application aims to identify custom audiences that actually buy a specific brand or product category. For more information visit [www.kantarmediana.com](http://www.kantarmediana.com).

New York researcher The Nielsen Company and Yahoo!, Sunnyvale, Calif., have launched Brand Impact, a study aimed at quantifying the branding effectiveness of online advertising campaigns across Asia, including Taiwan, Hong Kong, India, Korea, Singapore, Indonesia, Malaysia, Philippines, Thailand and Vietnam. For more information visit [www.nielsen.com](http://www.nielsen.com).

20|20 Research Inc., Nashville, Tenn., has added photo capability and an updated interface to its QualAnywhere mobile platform. Smartphones are not required. For more information visit [www.2020research.com](http://www.2020research.com).

Stockholm, Sweden, research company Cint has doubled the number of panelists housed in its Cint Panel Exchange to 5 million in one year. For more information visit [www.cint.com](http://www.cint.com).

## Research Industry News

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company; and Derek P. Jones of **AstraZeneca Pharmaceuticals**, Wilmington, Delaware, received the Circle of Excellence award from the **Pharmaceutical Marketing Research Group (PMRG)**, Minneola, Fla., for their help advancing PMRG through participation in PMRG events, delivering quality results and advocating for the organization.

### New accounts/projects

Stockholm, Sweden, research company **Cint** has integrated its Cint Direct Sample (CDS) solution with Sweden research software company **Action Dialog Partner (ADP)**, allowing ADP users to access the Cint Panel Exchange through ADP's online interface. Boulder, Colo., research company **Survey Gizmo** has also adopted CDS for its panels.

Separately, Cint has added panels from **RED C Research**, Dublin, Ireland; **Delve Research**, St. Louis; **SensorPro**, Limerick, Ireland; and **W5**, Durham, N.C., to the Cint Panel Exchange to expand its Irish sample base.

**London Broadcasting Company**, Dallas, has expanded its agreement with **Rentrak Corporation**, a Portland, Ore., research company, by adding two more markets to its StationView Essentials local market measurement contract. The contract includes a multi-year renewal with KBMT in Beaumont, Texas, and includes KYTX in Tyler, Texas, and KCEN in Waco, Texas.

Additionally, **Hallmark Channel** and **Hallmark Movie Channel**, Studio City, Calif., have adopted Rentrak's TV Essentials television ratings service.

**The Digital Media and Marketing Association**, South Africa, has selected Melbourne, Australia, research company **Effective Measure** as its measurement vendor.

**The Natural Marketing Institute**, a Harleysville, Pa., research company, has been selected by **The Organic Center**, a Boulder, Colo., nonprofit, to conduct an organic consumer research study.

**The Salvation Army**, Alexandria,

Va., has chosen Vancouver, B.C., research company **Vision Critical** to conduct the Dignity Project, a research endeavor that seeks to engage Canadians about the reality of poverty in the 21st century.

**GfK Custom Research North America**, New York, has been awarded the **General Services Administration** Mission Oriented Business Integrated Services contract. The contract allows GfK to serve public-sector clients and perform work directly for federal government entities.

### New companies/new divisions/relocations/expansions

**The Sound Research**, New York, has opened its Diversity Unit, dedicated to conducting research with Millennials of color. Vanessa Anderson will lead the unit.

Research consultancy **Jerry Henry and Associates** and theme park corporation **Herschend Family Entertainment** have launched **H2R Market Research**, Springfield, Mo., which will focus on the travel, tourism and leisure sectors.

Researcher Richard Owen has partnered with Mat Mabe and Jim Willis of Leicester, U.K., Web site and app developer Bulb Studios to launch **Crowdlab**, a London mobile research company.

New York research company **WorldOne** has expanded its London offices to occupy three floors at Unity Wharf and two floors at the adjacent Dockhead Building.

**Edentify**, a New South Wales, Australia, research company, has opened an office in Auckland, New Zealand. Jane McKellar will lead the operation.

Manchester, U.K., research company **B2B International** has opened a sales office in Brussels, Belgium.

**ActiveGroup Ventures Inc.**, a Norcross, Ga., research software company, has added new facilities across Europe, India, China, Russia and Singapore since the start of 2011.

Former researchers from **The Nielsen Company**, **Lieberman**

**Research Worldwide**, **Interpret**, **Nissan and Market Strategies** have launched **Vital Findings**, a Culver City, Calif., research company. The firm is online at [www.vitalfindings.com](http://www.vitalfindings.com).

Irvine, Calif., focus group consortium **First Choice Facilities** announced several updates and expansions to its member facilities. **Focuscope Inc.**, an Illinois research company, has opened its third Illinois facility in Oak Brook Terrace. **Superior Research**, Atlanta, has remodeled and upgraded its downtown Atlanta facility to include an in-house streaming system. Framingham, Mass., research company **National Field and Focus** has opened a 9,000-square-foot facility in Framingham.

### Research company earnings/financial news

**B2B International**, Manchester, U.K., reported 2010 revenue of \$6.15 million. The company has more than doubled in size since the end of 2006.

**EasyInsites**, Surrey, U.K., reported a sixteenfold increase in revenue in 2010 over 2009.

**The GfK Group**, Nuremberg, Germany, reported a 2010 annual sales increase of 11.1 percent over 2009 to approximately 1,294 million euros. Adjusted operating income for 2010 rose by 25.7 percent to approximately 185 million euros.

**Synovate**, Chicago, reported a 19.4 percent increase in operating profit to £45.6 million. Net revenue increased 9 percent to £350.7 million.

**The Nielsen Company**, New York, announced results for fourth-quarter and full-year 2010. Revenue for the year grew 6.6 percent to \$5,126 million. Revenues for the quarter increased 5.7 percent to \$1,371 million.

**Luth Research**, San Diego, reported a 50 percent increase in revenues in 2010.

**Vision Critical**, Vancouver, B.C., announced operating results for 2010. Total revenues were up 36 percent over 2009 on a constant currency basis.





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<i>Fragrance Rooms</i>	<b>YES-20</b>	<b>0</b>
<i>Sensory Booths</i>	<b>YES</b>	<b>NO</b>
<i>Test Kitchens</i>	<b>10</b>	<b>0</b>
<i>Commercial Kitchens</i>	<b>1</b>	<b>0</b>
<i>Eye-Tracking Labs</i>	<b>12</b>	<b>0</b>
<i>Laundry Facilities</i>	<b>9</b>	<b>0</b>
<i>Sensory Scientists</i>	<b>4</b>	<b>0</b>
<i>Mobile Laptops/PDA's</i>	<b>240</b>	<b>0</b>
<i>Neuroscience research</i>	<b>YES</b>	<b>NO</b>
<i>Dedicated In-Store Team</i>	<b>YES</b>	<b>NO</b>



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## Names of Note

continued from p. 10

Rhinebeck, N.Y., research company, has moved **Dean Kratsios** to its international division. Additionally, **Andrew Scott** has been named managing director, Europe, Phoenix Healthcare.

Los Angeles research company *MarketShare* has hired **Jeanette Carlsson** as executive vice president and managing director, Europe, the Middle East and Africa; and **Shigeyuki Tomomatsu** as executive vice president and managing director, Japan.

**Daniel R. Slawe** has been named COO and general counsel of *Evolution Marketing Research*, Blue Bell, Pa. The company has also promoted **Jennifer Steinberg** to director, field services.

New York research company *StrategyOne* has named **Robert Moran** president and named **Rocky Prozeller** director, online community research. Prozeller will be based in Chicago.

*Verve*, a London research company, has appointed **Andrew Reid** as



Reid

Glover

managing director and **Steevan Glover** as director, commercial development.

*Survey Sampling International* (SSI), a Shelton, Conn., research company, has appointed **Chris DeAngelis** to head SSI Health.

*Skopos Market Insight*, a London research company, has hired **Kevin**

**Macdonald** as director, digital, media, leisure.

*MarketVision Research*, Cincinnati, has hired **Brad Weiss** as research director. Atlanta research company *The Marketing Workshop Inc.* has named **Scott Layne** president.

New South Wales, Australia, research firm *OzTAM* has appointed **Michael Anderson** as independent chairman.

London research translation company *Language Connect* has appointed **Rudy Chang** as manager, sales and marketing, in its Melbourne, Australia, office.

Stockholm, Sweden, research company *Cint* has appointed **David Wieseltier** as head of Nordics; **Nelli Jensen** as country manager, Denmark; **Charlotte Bergström** as a senior account manager, Denmark; **Richard Ström** as account manager, health care; and **Viktor Bergh** as strategic account manager.

**Emily Hunt** and **Tom Wormald** have joined *ICM*



Hunt

Wormald

*Research*, London, as research director. Hunt will sit on ICM's management board. ICM has also promoted **Amanda Clack**, **Chris Menzies**, **Duncan Fergusson**, **Michelle Hesse** and **Nick Eul-Barker** to its management board.

**Alan F. Nugent** has been named CEO of Waltham, Mass., research company *Mzinga*.

Westport, Conn., research com-

pany *Firefly Millward Brown* has appointed **Meridith Bourgerly** to global qualitative account director. Bourgerly will serve as a member of the Firefly Global Qualitative board. Firefly has also named **Audrey Anand** senior strategy and creative director, Firefly London.

**Patricia Gottesman** has been named president and CEO of Cambridge, Mass., research company *Crimson Hexagon*.

**Richard Surratt** has been promoted to CFO and executive vice president, finance, at *Arbitron Inc.*, Columbia, Md.

*Pew Research Center*, Washington, D.C., has hired **James Bell** as director, international survey research; and **Matt Farrey** as director, development.

Reston, Va., research company *Clarabridge Inc.* has hired **Darren Jaffrey** as general manager, Europe, the Middle East and Africa.

**Gigi Wang** has joined Boston research company *Yankee Group* as chief research officer.

*Echo Research*, Godalming, U.K., has hired **Björn Edlund** as senior advisor and **Kelly Sirimoglu** as sector manager. Sirimoglu will be based in New York.

*The Sound Research*, New York, has appointed **Vanessa Anderson** to lead its diversity unit.

**Antonia Furtner** has been hired to lead the marketing sciences department at *GfK Austria*, a Vienna research company.

Chapel Hill, N.C., research firm *The Futures Company* has hired **Deniz Erdem** as director, European business development and sales.

*Cogent Research*, Cambridge, Mass., has named **Christopher Savio** and **Steve Sixt** project director.

# 2011

## Focus Group Moderator Directory



This directory was compiled by mailing, e-mailing and faxing listing forms to companies that we identified as having on-staff focus group moderators. Each firm was given a free basic listing including one on-staff moderator and also had the option to purchase a write-up, company logo insertion and industry and market cross-reference categories. We list 1,000+ moderators at over 900 firms.

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

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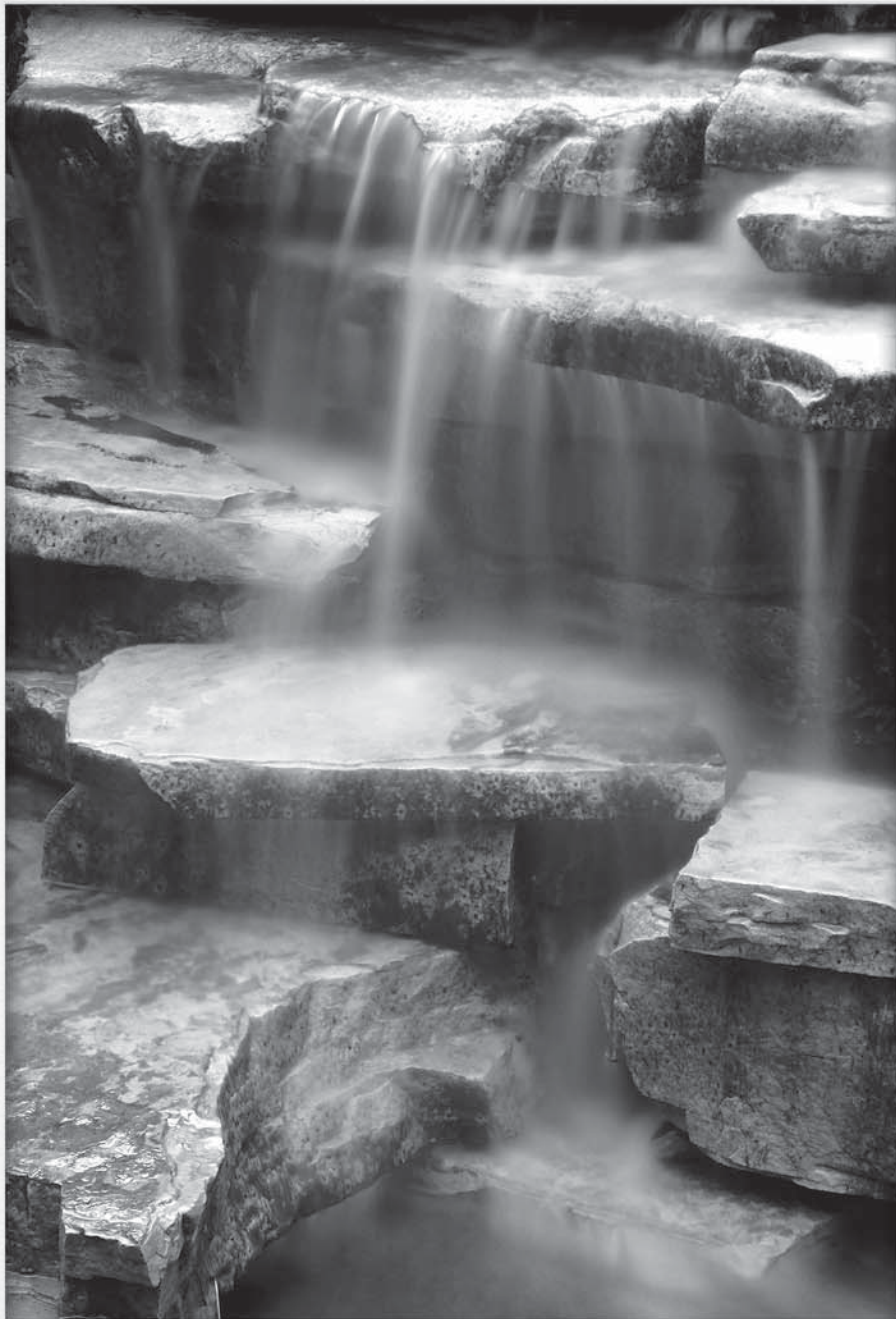
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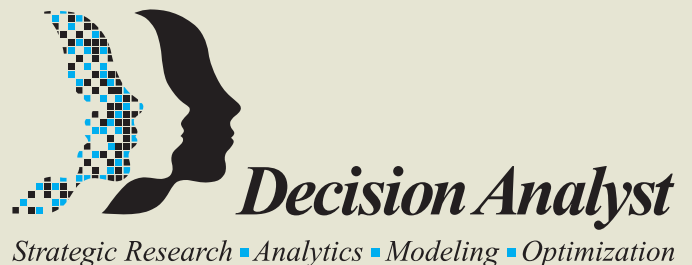
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# calendar of events

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*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](http://www.aapor.org).

*The Qualitative Research Consultants Association* will hold its first symposium on excellence in qualitative research on **May 12** at the University Club of Chicago. For more information visit [www.qrca.org](http://www.qrca.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](http://www.pbirg.com).

*The Council of American Survey Research Organizations* will hold a management conference on **May 16-17** at the Hyatt Regency in Chicago. For more information visit [www.casro.org](http://www.casro.org).

*IIR* will hold a conference focused on innovation and collaboration, themed "A New Front End: The Era of Collaboration," on **May 16-18** at the Seaport Boston Hotel and Adjacent World Trade Center in Boston. For more information visit [www.iirusa.com/fei-usa/fei-home.xml](http://www.iirusa.com/fei-usa/fei-home.xml).

The annual text analytics summit will be held on **May 18-19** at the Radisson Hotel in Boston. For more information visit [www.textanalyticsnews.com/text-mining-conference/index.shtml](http://www.textanalyticsnews.com/text-mining-conference/index.shtml).

*The Marketing Research and Intelligence Association* will hold its annual conference on **May 29-31** at the Delta Grand Okanagan in Kelowna, British Columbia. For more information visit [www.mria-arim.ca](http://www.mria-arim.ca).

*The Life Insurance and Market Research Association* will hold its annual marketing and research conference on **June 1-3** at the Renaissance Boston Waterfront Hotel in Boston. For more information visit [www.limra.com](http://www.limra.com).

*The Council of American Survey Research Organizations* will hold its annual technology conference on **June 2-3** at the Millennium Broadway Hotel in New York. For more information visit [www.casro.org](http://www.casro.org).

*The Marketing Research Association* will hold its 2011 annual conference on **June 6-8** in Washington, D.C. For more information visit [www.mra-net.org](http://www.mra-net.org).

*IIR* will hold a conference, themed "Measure Up," on **June 6-8** at the Hyatt Harborside Boston. For more information visit [www.iirusa.com/measureup](http://www.iirusa.com/measureup).

*The Cable and Telecommunications Association for Marketing* will hold its annual research and insights conference on **June 15-17** at the Palmer House Hilton in Chicago. For more information visit [www.ctam.com](http://www.ctam.com).

*IIR* will hold a conference, themed "Shopper Insights in Action," on **July 10-13** at the Swissotel in Chicago. For more information visit [www.iirusa.com/insights/shopper-home.xml](http://www.iirusa.com/insights/shopper-home.xml).

*RFL Communications* will hold a conference, themed "ROI on MR" on **July 27-28** in Chicago. For more information visit [www.rflonline.com](http://www.rflonline.com).

*The American Marketing Association* will hold its annual marketing research conference on **September 11-14** at the Hilton

Bonnet Creek Resort in Orlando, Fla. For more information visit [www.marketingpower.com](http://www.marketingpower.com).

*The 2010 Ethnographic Praxis in Industry Conference* will be held on **September 18-20** at the St. Julien Hotel in Boulder, Colo. For more information visit [www.epiconference.com/2011](http://www.epiconference.com/2011).

*ESOMAR* will hold its annual congress, themed "Impact - Research Reloaded," on **September 18-21** at Westergasfabriek in Amsterdam, the Netherlands. For more information visit [www.esomar.org](http://www.esomar.org).

*The Marketing Research Association, Quirk's* and the *Market Research Executive Board* will host the Corporate Researchers Conference on **September 21-23** at the Fairmont Chicago, Millennium Park Hotel. For more information visit [www.mra-net.org/crc](http://www.mra-net.org/crc).

*The Qualitative Research Consultants Association* will hold its annual conference on **October 12-14** at The Venetian in Las Vegas. For more information visit [www.qrca.org](http://www.qrca.org).

*PMRG* will hold its annual meeting of The PMRG Institute on **October 16-18** at the Hyatt Regency Jersey City in Jersey City, N.J. For more information visit [www.pmrgrg.org](http://www.pmrgrg.org).

*The Council of American Survey Research Organizations* will hold its annual conference on **October 19-21** at The Breakers in Palm Beach, Fla. For more information visit [www.casro.org](http://www.casro.org).

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

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# Advice on how to approach neuromarketing research

In an e-mail interview last month, Duane Varan – chief research officer, the Disney Media and Advertising Lab; and executive director, Audience Research Labs, Murdoch University – fielded a handful of my questions following the release in March of the first output from the ARF NeuroStandards Collaboration Project. The ongoing ARF effort, of which Varan is a part, brings together academicians, neuromarketing vendors and corporate researchers to give “media, marketing and advertising researchers more and better information to evaluate the opportunities that these new methods offer.”

Vendors participating in the ARF group include MSW Research, Gallup and Robinson, Innerscope, Mindlab International, NeuroCompass, Neuro-Insight, Sands Research and Sensory Logic. Corporate participants include Campbell Soup Company, Dentsu, Colgate-Palmolive, MillerCoors, GM, American Express, Hershey's, Chase, Clorox, Warner Bros. Entertainment and Starcom.

**Why do you think there is so much current interest in neuromarketing research? Is it**

**a result of dissatisfaction with existing methods?**

Varan: “Yes – in part. But the bigger issue is that advertisers are increasingly coming to terms with the emotional dimension of branding and verbal measures clearly fall short in this regard. The new methods present great promise in better understanding the emotional dimensions of marketing. They also give us access to continuous – i.e., second-by-second – measurement of consumer response.”

**What has led to the explosion in firms offering neuromarketing research products and services?**

“The media landscape has become hyper-dynamic – it is in a state of perpetual change. Advertisers are desperate for tangible measures to better understand the specifics of how their messaging works. The high level of control available through the new methods helps tease out effects in a way which brings greater certainty to the market.”

**What steps can corporate researchers take to make themselves more effective users of neuromarketing research products and services?**

“The biggest challenge a client faces is that they don't have appropriate expertise in-house to effectively understand the new services – which results in them having to trust the vendor almost entirely. This is a very dangerous position for both client and vendor to find themselves in. It also means that key contributions from the client, who best understands the brand, are often missed. This is precisely why access to the ARF's new Expert Review Network is so critical – it provides a mechanism for clients to adopt independent expertise as needed.”

**What are some questions that corporate researchers should ask of prospective providers of neuromarketing research products and services? Or, put another way, what kind of due diligence should corporate researchers do on a prospective provider?**

“Unfortunately, the issues are very complex and will be very specific to each method and each research question. So it is difficult to paint a set of questions that could universally apply. Resources like the Expert Review Network can help deal with the nuance of each



unique set of circumstances.

“But you are absolutely right in asking what kind of due diligence clients should rely on. What it should not be based on boasting rights of an advisory board membership - would advisory board members tell clients if there were problems? Or on unverified claims made by vendors. Whatever the process, it should be independent.

“Given the magnitude of many of the deals that are being made, some form of independent due diligence is clearly needed. The Expert Review Network, at the very least, provides an easy-to-access solution to this issue.”

### **In general, how should corporate researchers view neuromarketing research? A new frontier? A panacea? A new wrinkle?**

“Clearly, any client tackling the new media landscape needs to gain much greater precision in understanding how consumers interact with their brand. Gone are the days when you could simply machine-gun the audience with your message. Each impression is now far too valuable to waste. So research is critical in navigating a path forward. There are a variety of new tools coming into the market - another good example is set-top-box measurement - which are greatly improving our precision in measuring impact and bio/neuromarketing presents us with exciting new opportunities.

“I think that brands that sit on the sidelines are putting themselves at risk. If their competitors are engaging with the new methods they will probably gain insights that give them market advantage. By the same token, I think that brands that engage uncritically lack wisdom and could easily find themselves investing on misguided insights. The key is to engage - but rise to the challenge and make sure that this engagement is meaningful and appropriate. That’s precisely what the ARF is now facilitating.

“The question is not if a brand should engage with the new methods, it’s how it should do so.”

### **What, in your view, are some of the strengths of neuromarketing research?**

“I think the greatest strength is its ability to access variables that otherwise can’t be accessed. With emotion, in particular, something gets lost in the translation of emotion into words. Bio/neuro measures give us access to new frontiers.”

### **What are some of the weaknesses?**

“There is too much fascination with the technology and not enough with the rigor of the design. The technology enables exciting possibilities - but given the complexities, the technology has to be used appropriately. This is far more complex than I think people realize. It highlights the need for independent review.”

### **What are some of the next steps planned for the ARF NeuroStandards Collaboration? What will its next output be?**

“The ARF now has a forum specific to this area of research. That forum provides a community that can continue to engage with the issues and advance the area. A key priority for the forum will be to articulate objectives for NeuroStandards 2.0.” | **Q**

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## Coming in the June issue...

### **Mom as shopper**

A look at the various research methods that can be used to help understand moms and their shopping needs and behaviors.

### **Qualitative research using mobile devices**

How has the advent of mobile devices affected the kinds of qualitative research we can conduct?

### **Smart phone = smart research tool**

Vivek Bhaskaran profiles the four critical constructs of smart phones that make them versatile research tools.

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# before you go...

## online and offline

News about Quirk's and quirks.com

### Quirk's reaching its largest audience ever

Following a record-setting Q1 in 2010, Quirk's set another audience record in the first quarter of 2011. With March's Web site visitor count surpassing 94,000, the total number of Web users for the period was 224,000 - a growth of 10.33 percent over the first quarter of 2010 and 24.93 percent growth since 2009. Quirk's e-newsletter has also increased to more than 27,000 subscribers - a rise of 42 percent in the last year alone. In addition to the online audience increase, print magazine circulation numbers exceeded 23,500. We would like to give a big thank-you to researchers for continuing to use Quirk's as your source for all things marketing research!



### Quirk's directory searches just got easier

Quirk's has added a tabs feature to our online directory search. The basic premise is to allow users to see a company's listing information in all directories, regardless of which directory a user initially uses to search for a company. Previously, if a user searched the Telephone Facilities Directory to locate a company, the visible information was specific to the company's telephone

facility. With the new feature, users can click on a tab to see the information that company has in the other directories as well - without leaving the company's Telephone Facilities page or having to do another search.

### MRA/Quirk's/MREB corporate researcher event

Quirk's is collaborating with the Marketing Research Association and the Market Research Executive Board to present a conference aimed at corporate researchers. The event will be held in Chicago at the Fairmont Chicago, Millennium Park, on September 21-23. Details are still being hammered out at press time but visit [www.mra-net.org/crc](http://www.mra-net.org/crc) for more information.



## cover-to-cover

Facts, figures and insights from this month's issue



Rank-ordering makes more sense to further evaluate top-rated alternatives. That's where consumers make their most important purchase decision trade-offs anyhow, since a second tier of brands, products, etc., is rarely afforded significant thought in the minds of consumers. (page 18)



These collages act as lie detectors or as unrealistic rational thought detectors. If, during the latter parts of the group when concepts and/or other stimuli are shown, the participants start saying things that are inconsistent with their previous unaided 3-D storytelling, the moderator knows to probe further. (page 38)



It is a misconception, and a scary one, that marketers will be able to (or want to) just measure people's responses to brands via electrodes and work out what they really want. There is still no substitute for talking to people, as this is the only way we can understand the whole meaning of their relationships with brands and products. (page 52)



Human beings don't understand their true motivations, this line of thinking goes, and therefore asking them directly (or even indirectly) about why they like an ad or why they buy one brand of shampoo is, at best, misleading and, at worst, pointless. (page 58)



## Enter to win!

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Congratulations to March's winner, Alice Blake of Mary Kay Inc., Dallas. March's prize was a free focus group from Delve.

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