QUIRK'S

Marketing Research

JUNE 2011

Rethinking the role of shopper insights

Also...

> What smartphones mean to researchers

> How to implement a research project screening process

> Thoughts on tech-driven MR

June 2011

Quirk's Marketing Research Review
Volume XXV Number 6

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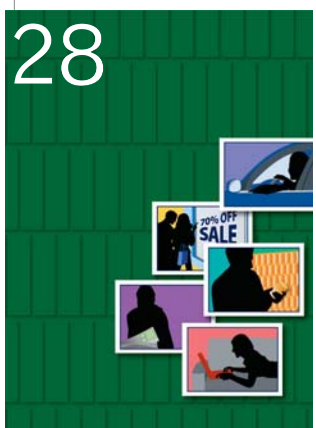

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in case you missed it...

news and notes on marketing and research

Celeb followers a likely crowd for brand advocates

There's no doubt that the right celebrity endorser can be a valuable asset to a brand. Advertisers are increasingly using social networking and celebrities to attract consumers. However, while celebrities can be valuable to advertisers so too can the people who follow them on social media Web sites.

According to New York researcher The Nielsen Company, 64 percent of adult U.S. Internet users who follow a celebrity also follow a brand - this means the celebrity follower is four times more likely to follow a brand than the average U.S. adult online. Additionally, such fans are also more likely to offer advice and opinions to fellow online consumers. This is particularly the case when it comes to entertainment topics, where 32 percent of celebrity fans online provide advice on movies (making them 44 percent more likely than the average online user to do so) and 28 percent provide guidance on music (56 percent more likely) and television programs (34 percent more likely).

Fans of celebrities are also valuable consumers in other areas of online - particularly when it comes to transactions or purchases. One-quarter also used the Web to conduct personal banking transactions and manage their credit card accounts.

Top online purchases among these online fans included clothing/shoes/accessories (18.2 percent), music (13.8 percent) and books (13.6 percent). Top online activities among fans of celebrities included e-mailing, paying bills and, of course, social networking. Of these top online activities, celebrity fans were significantly more likely than the average adult online to comment/post on social networking sites (86 percent more likely), view consumer-generated video (83 percent more likely), visit a social networking site (67 percent more likely) and play online games (45 percent more likely).

Tags let consumers track their red snapper supper

America has morphed into a nation of trackers - following everything from flight delays to USPS packages. Now there's even the option to track your dinner. With growing concerns regarding ocean sustainability and healthy sea-life in the wake of the 2010 Deep Horizon oil spill, the Gulf of Mexico Reef Fish Shareholders' Alliance has launched Gulf Wild, a branding effort that will attach a unique tag to the gill of every fish its members catch. Chefs and consumers can then enter the code in a "Find my fish" feature on its Web site and see precisely where the fish was harvested - and a photo of the fisherman who caught it.

Red snapper from the region is currently on the "avoid" list of such environmental watchdogs as the Monterey Bay Aquarium, even though the program to resurrect the fish's numbers ended in 2009. Red snapper has seen an increase of 40 percent in its allowable catch, as have red grouper and more than a dozen other grouper and tile fish species.

Note to marketers: Don't overlook male buying-power

No matter how you look at it, stereotypes about men being "out of it" when it comes to the decision-making process of small and big-ticket items are folly, according to a survey taken among 13,000+ listeners of

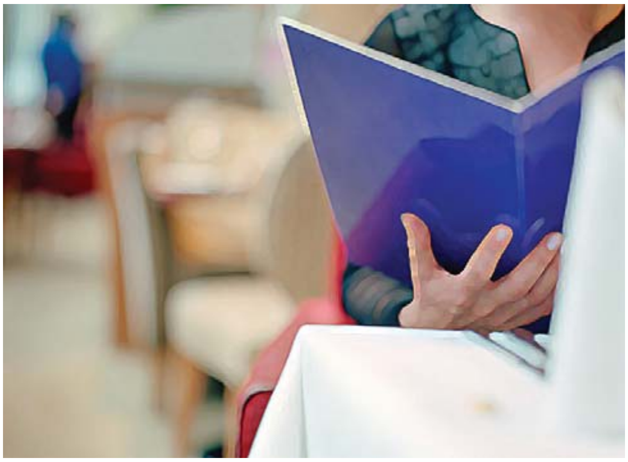
rock, alternative, classic rock and sports radio stations by Southfield, Mich., radio consulting firm Jacobs Media.

While many advertisers share the misplaced belief that women are responsible for the lion's share of household purchasing decisions, results from the survey show that men play a crucial role in purchasing decisions. Thus, companies that market and advertise products to a broad audience might need to rethink their long-held assumptions about the value of men. "We work with our radio clients every day to help them position their male audiences to advertisers and over the past few years, we've become frustrated," says Paul Jacobs, vice president and general manager, Jacobs Media. "There has been a shortage of solid data to help educate marketers about the changing role of men in the purchasing process."

The Jacobs Media study found that three out of 10 men are single and more than 80 percent of them make the sole or key big-ticket decisions in their households. This segment of the male population profiles equal to or better than women in their decision-making power and are a significant opportunity for growth. Even women agree that men should have major input on decisions about buying big-ticket items. In fact, 60 percent of women say that a recommendation from a spouse or partner is a deciding factor when making major purchases. Six in 10 men play a key role in the big-ticket item buying process: They either are the sole decision makers or play a key role in the purchase of items like homes, cars and major appliances.

Diners tell restaurants how to drum up more business

Coupons and discounts will always have a place in the food-service industry, but a panel of restaurant-goers say there are factors other than price that could motivate them to dine out more frequently. Increased access to calorie counts and other nutritional information at restaurants would influence how often they visit and the quick-service restaurant (QSR) and fast-casual restaurant categories, according to a study conducted by Radius Global Market Research, New York, among its panel members about their dining behavior in the first three months of 2011. These health-oriented communications led all other consumer recommendations.



Diners in all categories said that between-meal and late-night snacks are popular in QSRs and more than one in five would visit more if offerings were increased. Fast-casual eaters want a wider variety of both chicken and breakfast menu items and almost one-fourth of fast-casual diners said they'd likely act on promotions delivered via social media networks like Facebook and Twitter. In the casual-dining category diners say they'd come more often for unique premium burgers. Customers visiting fine-dining establishments prove the toughest to motivate as nearly half of respondents indicated that their current habits could not be changed by anything other than price. Nearly two-thirds of respondents said they'd be willing to dine out more often if restaurants acted on their suggestions.

The influence of other factors is on the rise but the food-service industry shouldn't abandon discounts and coupons any time soon. Coupons continue to be the primary way that consumers control spending when dining out. Respondents expect deals and coupons across all food-service categories, including fine-dining. And a vast majority of diners (86 percent) say they find ways to trim the bill each and every visit, up 10 percent since 2009. For more information visit www.radius-global.com.

Pre-research a key part of the shopping ritual

Consumers overwhelmingly rely on online reviews and price comparisons to research products and services before making a purchase. Less than one-third of respondents said they had not conducted online pre-purchase research, such as comparing price or investigating online reviews before buying a product, while the majority (62 percent) read reviews online, according to a survey by Lightspeed Research, Warren, N.J. Forty-nine percent of consumers researched competitors and the same number checked price comparison sites.

Despite the popularity of Facebook and Twitter, only 7 percent of survey respondents look for product reviews from friends on social networking sites. "Despite their role in our digital lives, social networks don't yet seem to be the place where word-of-mouth is delivering its full power," says Naor Chazan, marketing director, Americas, at Lightspeed Research.

Consumers turn most readily to search engines (64 percent), shopping Web sites (58 percent), the *Consumer Reports* Web site (54 percent), company Web sites (47 percent), review communities (32 percent); magazines (24 percent); forums/blogs (22 percent), shopping comparison sites (21 percent) and newspapers (16 percent) for their research.

Almost three-quarters of respondents said they trust *Consumer Reports*, followed by the opinions and experiences of other consumers (62 percent) and recommendations from family, friends and colleagues (58 percent).

Twenty-one percent of the people surveyed said they change their minds about buying a product or service after reading two bad reviews and 37 percent said reading three negative reviews would persuade them against buying a particular product or service.

Respondents research everything imaginable, from expensive products such as cars, personal technology and home appliances, to less expensive items like books, films, clothes and games. It's the same story for services. Hotel accommodation is the top researched service at 66 percent, followed by mobile phone companies, insurance and banks/financial services. For more information visit www.lightspeedresearch.com.

Government finances worry Americans most

Nearly three-fourths of Americans worry about the economy a great deal more than they worry about 13 other issues (i.e., affordable health care, unemployment, crime and violence, illegal immigration, terrorism, drug use, etc.), according to a poll from Washington, D.C., research company Gallup.

Sixty-four percent worry a great deal about federal spending and the budget deficit but show the least anxiety about race relations - the only issue about which the majority is only a little

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names of note

Margaret (Hicks) Feit, former president of Atlanta research company *Jackson Associates*, died on April 4 at age 66.

Framingham, Mass., research company *Kadence International* has appointed **Barbara Gourley** as insights director and U.K. board member at its London office.

Kathleen Schmidt has joined *Percept Research*, Durham, N.C., as senior account manager, client services.

Market Probe, a Milwaukee, Wis., research company, has named **Saji Kumar** managing director, Asia-Pacific.

Kumar Weiner

Waltham, Mass., research company *Applied Marketing Science Inc.* has hired **Lori Weiner** as senior project director, product and process innovation and litigation support.

Ouiza Rebahi has been named managing director of Stockholm, Sweden, research company *Cint*'s Paris office.

Los Angeles research company *New American Dimensions* has hired **Leslie Smith** as senior vice president, business development and marketing.

Vancouver, B.C., research company *Vision Critical* has appointed **Mark Marissen** as vice president, business development; and **Jodene Vining** has been named account director, Australia and New Zealand. Vining will be based in Sydney. **Brad Wilson** has been appointed director, business development, Australia and New Zealand, and will be based in Melbourne. **Kris Hartvigsen** has been promoted to senior vice president, business development, direct sales, Europe. Hartvigsen will be based in London.

Synovate, a Chicago research company, has made several appointments and promotions. **Howard Ballon** has joined the company as managing director, new media and entertainment, North America. Ballon will be based in Los Angeles. **Tradian Almasanu** has been named key account director, consumer packaged goods, U.K. **Matt Couture** has joined the company's Marketing Management Analytics division as senior director, client service and analytics. Synovate has also hired **Steve Laue** as managing director, banking, finance and insurance research, for Synovate in Greater China. **Darren Smith** has been promoted to director, operations, Synovate Pan-Africa and will be based in Kenya. **Jon Harper** has been promoted to global head, brand and communications. **John Carroll III** has been promoted to global head, customer experience.

Couture Laue

Donna Koenig has joined *Lynx Research Consulting*, Boise, Idaho, as vice president, account executive.

G & S Research, Indianapolis, has made four appointments: **Chuck Stroyeck**, director, client services; **Andrew Robertson**, planning and reporting analyst; **Mary Tocci**, project manager; and **Graeme Leiser**, manager, client services.

Ipsos OTX MediaCT, a Los Angeles research company, has promoted **Eric Villain** to president, media and technology. Additionally, **Audra Priluck** of Ipsos OTX MediaCT has been appointed to the interactive media peer group executive committee of the Academy of Television, Arts and Science, North Hollywood, Calif.

Scarborough Research, New York, has hired **Gerardo Guzman** as vice president, product management.

Bloomfield, Conn., research company *The Pert Group* has hired **Christopher Barnes** as senior vice president, client development.

Denise Conroy-Galley has been promoted to executive vice president, marketing and research, of *Outdoor Channel*, Temecula, Calif.

Shari Lesser has joined Santa Monica, Calif., research company *The Phelps Group* as a public relations specialist.

Dallas research company *Toluna* has hired **John Bremer** as chief research officer and **Peter Shafer** as senior vice president, enterprise solutions.

Quick Test/Heakin, a Jupiter, Fla., research company, has made the following appointments: **Heather Hyland**, **Janet DeVries**, **Marcos Santizo** and **Lisa Youngblood**, manager; and **Stephanie Villacreces**, project manager, entertainment.

Bellevue, Wash., research company *Global Market Insite Inc.* has promoted **Jon Puleston** to vice president, innovation; **Mitra Asilzadeh** to vice president, international service operations; and **Betsy Yalcin** to vice president, human resources.

Danica Kwon and **Erin Chun** have joined *Polaris Marketing Research Inc.*, Atlanta, as analysts.

Rochester, N.Y., research company *Harris Interactive* has appointed **Alan Gould** to its board of directors.

David C. Owen has been named managing consultant of *Consensus*

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product and service update

EmSense brings neuroscience research in-home with NeuroPanel; updates EmBand technology

San Francisco research company EmSense Corporation has launched NeuroPanel, an in-home research panel using neuroscience technology. The neurometric in-home research panel will use EmSense's EmBand, a scalable electroencephalography (EEG) brainwave measurement headset device used to measure positive/negative emotional response and cognitive engagement, plus other bio-sensory response metrics.

Additionally, EmSense has released its EmBand 24 headset, which uses 24 EEG sensors, each measuring at 20,000 times per second. The EmBand 24 provides a signal-to-noise ratio in real-world, in-context conditions; does not require caps, gels or wires; and calibrates in one minute. For more information visit www.emsense.com.

eCGlobalPanel launches social media platform for co-creation

Miami research company eCGlobalPanel has launched a social media research platform that aims to create new experiences between consumers and market researchers. The solution includes a range of environments and integrated applications, including the eCGlobal.com community that allows consumers to set their profiles and connect with other users according to their consumption experiences, lifestyles and areas of interest. Researchers can also interact in various ways in the network, such as creating sponsored questions, opening discussion topics or creating other community activities.

Other options for interacting include social media games such as Um Ou Outro (One or the Other) where consumers can choose their preferred products and brands and see the preferences of others, as well as invite friends to participate, thus creating a zone of interaction. Another branch of interaction for researchers is through eCKRM, a technology platform designed to connect consumer knowledge and relationship management. Researchers can post activities, follow results and have access to a growing knowledge base. For more information visit www.ecglobalpanelcorp.com.

GMI Ad Tracker offers trifecta of customizable data sets

Global Market Insite Inc. (GMI), a Bellevue, Wash., research company, has released GMI Ad Tracker, a solution designed to evaluate reach and effectiveness of online advertising campaigns including behavioral and attitudinal data. Combined with GMI's existing global panel, GMI Ad Tracker aims to offer a one-stop solution by combining three complementary datasets for an integrated view of consumer action and perspective.

The first dataset is campaign exposure data - online ad exposure data that can be viewed by campaign, site or individual ad level. Intuitive analytics are made available via an automated reporting dashboard to enable in-field ad decisions. The second is demographic data, where GMI's technology integrates exposure data with its double opted-in panel, including demographic data on global consumers with 200+ attribute variables. Finally, the third is self-declared insights, which delivers consumer insight data by way of online surveys specifically targeted at exposed and unexposed respondents. Each dataset can be customized. For more information visit www.gmi-mr.com.

Vision Critical debuts Firefly Surveys for small- and medium-sized businesses

Vancouver, B.C., research company Vision Critical has released a packaged survey bundle for small-to-medium-sized businesses, dubbed Firefly Surveys. The Firefly Surveys interface combines the three elements of results-driven research: a survey-authoring platform; access to sample from North American general-population online panels; and support from Vision Critical researchers, software developers and respondent engagement specialists. This bundle aims to enable businesses to write surveys more efficiently, deploy them to the right respondents and to analyze results quickly and easily.

New Firefly subscribers are eligible for a credit up to $1,500 ($500 toward sample and $1,000 toward client support services). For more information visit www.fireflysurveys.com.

OnePoint announces mobile app interface to simplify feedback integration

OnePoint, a New York research company, has debuted its OnePoint App Interface, a mobile app interface designed to embed interactive feedback tools into existing mobile apps without incurring new programming costs or compromising existing "app share" through new app downloads.

OnePoint App Interface also offers a series of progressive capabilities, including: delivering location-based surveys that are automatically activated based on location; providing video, photo and voice capture for detailed respondent experience; including barcode scanning and QR code functionality; and permitting full control of survey construction, even with complex question types, validations and logic. For more information visit www.onepointsurveys.com.

Consumer data aims to offer users BIGinsight

BIGResearch, Columbus, Ohio, has launched www.BIGinsight.com, a Web site intended to combine real-time data points from numerous sources and make them available as insights through interactive charts, videos and Webcasts. Users will be able to view current information on

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News notes

On April 12, Senator John Kerry (D-Mass.) and Senator John McCain (R-Ariz.) introduced a Commercial Privacy Bill of Rights to establish a baseline code of conduct for how personally-identifiable information and information that can uniquely identify an individual or networked device are used, stored and distributed. Privacy rights include the right to security and accountability; the right to notice, consent, access and correction of information; and the right to data minimization, constraints on distribution and data integrity. Other elements include enforcement, voluntary safe-harbor programs and the role of the Department of Commerce.

The Media Rating Council (MRC), New York, has granted accreditation to **Arbitron's** TAPSCAN Web, a Web-based sales proposal and analysis software system for radio. The MRC has also accredited the monthly average-quarter-hour radio ratings data produced by the Portable People Meter radio ratings service in 11 additional markets: Atlanta; Cincinnati; Cleveland; Kansas City; Milwaukee-Racine, Wis.; Philadelphia; Phoenix; Portland, Ore.; Salt Lake City-Ogden-Provo, Utah; St. Louis; and Tampa-St. Petersburg-Clearwater, Fla.

Separately, Reston, Va., research company **comScore Inc.** has received accreditation from the MRC for its comScore Direct service.

Acquisitions/transactions

U.K. research company **SPA Future Thinking** has acquired the **Munro Group**, East Kilbride, U.K., which includes **FDS International**, a London research company, and **Maven Research**, San Francisco, for an undisclosed sum. Munro will be incorporated into the SPA Future Thinking brand.

London research company **YouGov** has agreed to acquire **Definitive Insights**, a Portland, Ore., research consultancy.

Washington, D.C., research agency **CSA** has acquired Paris research company **Directpanel**.

Port Washington, N.Y., research company **NPD Group** has finalized its acquisition of **In-Stat**, a Scottsdale, Ariz., research company. In-Stat will operate in conjunction with NPD's DisplaySearch division but retain its name.

London research company **Cello Group PLC** has acquired Redhill, U.K., research company **Red Kite Consulting Group Limited**. Cello will merge Red Kite with MSI, its existing pharmaceutical consulting business.

KANA Software Inc., Sunnyvale, Calif., has completed its acquisition of **Overtone Inc.**, a San Francisco social media and customer listening company.

New York technology analyst company **The 451 Group** has acquired **ChangeWave Research**, Rockville, Md.

New York hotelier solutions company **Travelclick** has acquired Maharashtra, India, research company **Rubicon**.

San Francisco software company **Meltwater Group** has acquired Bedford, N.H., customer relations management software company **JitterJam**.

Paris research company **Ipsos** has agreed to purchase the Central America custom research brand for **TMG - The Marketing Group**, New York.

Boulder, Colo., research company **Market Force Information** has acquired Winnipeg, Manitoba, research company **Tell Us About Us**.

Alliances/strategic partnerships

Research companies **Ask Your Target Market** (AYTM), San Francisco, and **uSamp**, Encino, Calif., have partnered to make uSamp's panel of U.S. survey respondents available to AYTM clients.

Reston, Va., research software company **Clarabridge Inc.** and **NM Incite**, a New York joint venture of Nielsen and McKinsey & Company, have formed a strategic alliance to offer clients NM Incite's social media data through the Clarabridge platform.

New York research company **GfK MRI** and **Starch Research Services Limited**, Toronto, have partnered to launch GfK MRI StarchMetrix, a syndicated service to provide ROI metrics for ads appearing in Canadian consumer magazines.

London research company **Crowd DNA** has partnered with New York research consultancy **the rabbit hole** to make the rabbit hole's network and offerings available to Crowd DNA clients.

Research companies **KL Communications Inc.**, Red Bank, N.J., and **NetBase Solutions Inc.**, Mountain View, Calif., have partnered to integrate social media analysis into KL Communications' research platform.

Scarborough Research, New York, and **Geoscape**, a Miami research company, have partnered to improve their efforts toward Hispanic consumers by adding Geoscape's Hispanicity segmentation system to Scarborough's consumer studies and Hispanic databases.

Corvallis, Ore., research company

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Sample access
www.cint.com

By John Williamson

How online video-based qualitative delivers the truth

The Internet has revolutionized scores of industries and businesses, given birth to new ones (see: eBay, Facebook) and forever changed others (see newspapers, travel agents). Because a generation or two have grown up on the Internet and because it is so commonplace, we often don't realize just how profound its changes have been and how profound they continue to be. One of the great paradoxes of fundamental change is that the people least aware of it are the ones most involved in it. And while it is always risky to say that the Internet has transformed one industry more than others, it is also becoming clearer and clearer that because of the Internet, qualitative research will never be the same.

Before the Internet, qualitative research was constricted by geography – essentially, researchers either had to travel to conduct their research or have their subjects travel to them. Either way was expensive and time-consuming. Now, researchers can reach across the globe without stepping away from their desks. From the kitchen of a busy suburban household to a tranquil village in India, the Internet is penetrating virtually every corner of the world through computers, and increasingly, mobile phones.

Before the Internet, even the fastest research methods took weeks from recruiting subjects to reporting results. Today, information "slow in coming" is information weak in value. Now, researchers can get answers they need in hours or days.

Before the Internet, qualitative research meant lots of logistics – and took an expert to get all the parts aligned – from recruiting the right participants and coordinating the right mix of markets and facilities to ordering dinner for attendees. Now, it's as simple as an online wizard (think of what it took to arrange a vacation through a travel agent back in the day vs. going to Expedia today).

Before the Internet, qualitative research was a big-ticket item that was restricted to bigger companies. Smaller businesses had to rely on guesswork, or the always-popular "sample of one," as in, "My brother thinks we should change our packaging." Now, its costs have gone down and availability has gone up.

But what makes the potential for online qualitative research to replace a

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snapshot

The author argues that online video-based research will transform qualitative by giving marketers and researchers direct access to consumers' opinions and experiences.

significant share of traditional offline methods (such as focus groups) – that is, what will truly make those methods obsolete in most cases – is when the feedback (the data) is simply better.

I believe that time has arrived. And things will never be the same. The feedback via the Web is better because now mobile video devices allow participants to talk about products or experiences in the moment – when they're using the products or when they're reacting to an ad naturally or when they're shopping. These moments of truth are the Holy Grail of great qualitative research and the Internet can now deliver them in rich, candid and uninhibited video.

Innate human curiosity

Maybe you've heard that great segment on public radio that attempted to answer the question: What power would you rather have – the ability to fly or the ability to make yourself invisible? Some people choose flying. Interestingly enough, most people choose invisibility. Why? I think it's because of the innate human curiosity to be around people when they don't know you're there, to listen to them when they aren't sensitive to what you might hear, to experience how they act outside of your presence.

And why would we think that important? Because we know that if you really want to know what people think of you or how they really act, you have to find some way to be around them when they don't know you're there. That's the motivation behind eavesdropping, isn't it? Or why we wish we'd have been that proverbial fly on the wall at this moment or that. While this concept can seem rather creepy to the average person, in fact it is the marketer's Holy Grail. Because it's this true behavior and thinking upon which great products, messaging, campaigns and brands are ostensibly built.

It's about the truth. Marketers and researchers want to know what people say about their products and how they act when no one is around, because they know it is inherently more truthful than when someone else is there watching. It's not because people are deceptive (although some certainly are); it's because they are sensitive to our feelings so they moderate their behavior and language. They want to please, or avoid an argument, or not hurt feelings. They want to make themselves look good. They don't want to tell us that our pants make our butts look big, that we really do look our age or that our driving scares them to death. That politeness is good for sustaining harmonious human-to-human interactions but it's not good if you're a researcher trying to find out what consumers really think about your product or service.

And that's the beauty and value of online video-based qualitative research. For the qualitative researcher, whose goal is always to know the unadorned truth of what consumers really think and feel, mobile video devices such as handheld cameras, Flip cams and mobile phones allow you to be that fly on the wall. They allow spontaneity to trump contrivance, depth to replace brevity, speed to eclipse delay and non-verbal communication to triumph over words on paper. Companies can get closer to their customers, with fewer intermediaries – human or otherwise. Researchers can be there, with the consumer, at the very moment he or she is using a product or judging its quality, without actually being there. Virtually invisible.

As a researcher, does that mean you can't get to the truth without online video-based methods? Certainly not. However, these new Internet solutions allow you a level of access that you can't as easily reach in person. One key reason is peer pressure. Most discussions of peer pressure have to do with the other research participants in the room during a focus group or other group interaction. That presence of fellow participants – all of them strangers – is certainly an element that can inflict bias and self-consciousness. However what many people don't consider is the impact the researchers themselves play in creating a unnatural dynamic for the participant. People tend to act and talk differently around other people – and particularly around a stranger. Does that mean that great researchers can't put even the most guarded participants at ease and get valuable insights? Of course not. But the point is that online video-based methods can create optimal low-pressure environments every time.

Paying attention to their smartphones

Mobile communication devices have quickly become everyone's most commonly used tool. Watch a group of young people in a coffee shop; they're sitting together but paying attention to their smartphones. Watch fans at a baseball game; they're as interested as what's on their screen as what's on the field.

These mobile devices enable qualitative research to deliver information that has simply not been available before. Insights come from on-site. Respondents, uninhibited by some artificial time line or some agenda-driven moderator, take the time to ruminate on-camera about a product or service – when it's convenient for them and where it's most pertinent, be that in the middle of a store or in the privacy of a powder room. Their responses to researchers' questions can be longer, more detailed, more revealing. In turn, that candid, in-the-moment, expansive response translates into more opportunities for the client and can result in fewer chances of making a mistake. Any marketing decision, any business decision, is only as good at the information it's based on.

And instead of considered, written or edited responses, answers to questions and volunteered insights can be spontaneous, stream-of-consciousness reactions. Researchers benefit from being able to see non-verbal communication. A shrug of the shoulders, a roll of the eyes, a shake of the head, a smile ... all communicate more than words on paper or a disembodied voice.

Researchers get to the "why" of opinions and actions. Why do you like this packaging better than the competitor's? Why don't you like the taste? Why would you choose this paper towel over the cheaper one? Why do you feel better shaving with the razor that has the rubber handle than the plastic one?

We've learned that through video-based research, consumers actually like going into details such as those. They see themselves as valued partners with their products and they want companies to know why they react to a product the way they do. They feel more important because they are more important. They know that if a company wants to see and hear them talking about a product, the company must be deeply interested in what they think, and they respond honestly, fully and helpfully.

Transform the category

So will the Internet and mobile video technologies finally transform the qualitative research category with the same order of magnitude it has changed other industries? Bet on it – seeing is believing. | Q

By Brett Hagins

How to implement a screening process for research projects

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

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

A portion of our depth interviews focused on specific questions that selected research leaders asked their stakeholders as part of their internal screening or prioritization process in response to research requests. We then aggregated the input to produce a best-of-breed screening process that synthesized questions from a variety of organizations.

Agreeing on a set of criteria that projects should meet before spending research dollars or time and then getting that set of criteria approved by senior management will:

- give the research department leverage in focusing time and resources on higher-value requests;
- help avoid wasting time on low-value requests and give the research department a clear and objective means of prioritization, thereby significantly decreasing stakeholder perception that their request was not treated fairly if not given priority;
- help internal stakeholders think through what they really need out of a project from a business perspective;
- help position the department as a good steward of corporate resources;
- train stakeholders on the most effective way to work with

snapshot

A well-planned approach to vetting the value of a proposed research effort can pay a number of dividends, Brett Hagins writes, from saving time and money to advancing the researcher's career.

research to maximize personal and professional success.

Our quantitative study revealed most organizations do not have a screening process but are still able to screen out some low-value research requests.

There are three steps in implementing a screening prioritization process.

Step 1: Agree on a set of high-value research criteria for the project.
Could the subject of the research ***address a threat or opportunity*** that (if it goes without attention) could substantially threaten our business model, accelerate obsolescence? Does it address an opportunity that, while not on our current agenda, could be a major growth area for new revenue?

Is it ***aligned with high-impact marketing or strategy initiatives***? Research that is aligned with high-dollar initiatives or initiatives that have a strong financial impact is more important than research that is aligned with lower-value initiatives.

Will it ***help with decisions*** where there is a high level of uncertainty about what to do and how best to proceed? Research that validates decisions that have already been made or reduces risk slightly is not as valuable as research that reduces a substantial amount of risk.

Is it ***more prescriptive than diagnostic***? It tells us how to seize opportunities and or how to solve problems and/or how best to move forward (forward-looking rather than backward-looking) rather than simply describing a condition, problem or impact.

Will it be ***begun early in the decision-making process***? Research that is begun early in the decision-making process, at the top-level strategy stage, is more impactful than research that is done after most major decisions have already been made and research is involved only in the tactical issues.

Does it ***address issues or problems*** we will likely have the time and resources to fix?

Is it ***aligned with one of our corporate priorities*** for this year?

Does it ***have a senior executive sponsor***? Projects that have an executive sponsor are more likely to have impact on decision-making due to higher visibility, support and the ability to mobilize people and resources as needed to address problems highlighted by the research.

Will it ***influence multiple decisions*** rather than a single one? The insight gained from the research will be used across a variety of initiatives.

Will it ***benefit multiple departments and/or business units*** and not simply a single stakeholder?

Step 2: Formulate questions that allow stakeholders and research to assess how well their research request fits your set of screening or prioritization criteria and a rating system.
At a high level, the next step in the process is to formulate questions based on your criteria. Sometimes

we get pushback such as "We're not ready for a screening process" or "We're still trying to educate people as to what is possible with research." The real value of a prioritization process is to train internal clients on how you want them to work with the research department - even if you rarely screen anything out.

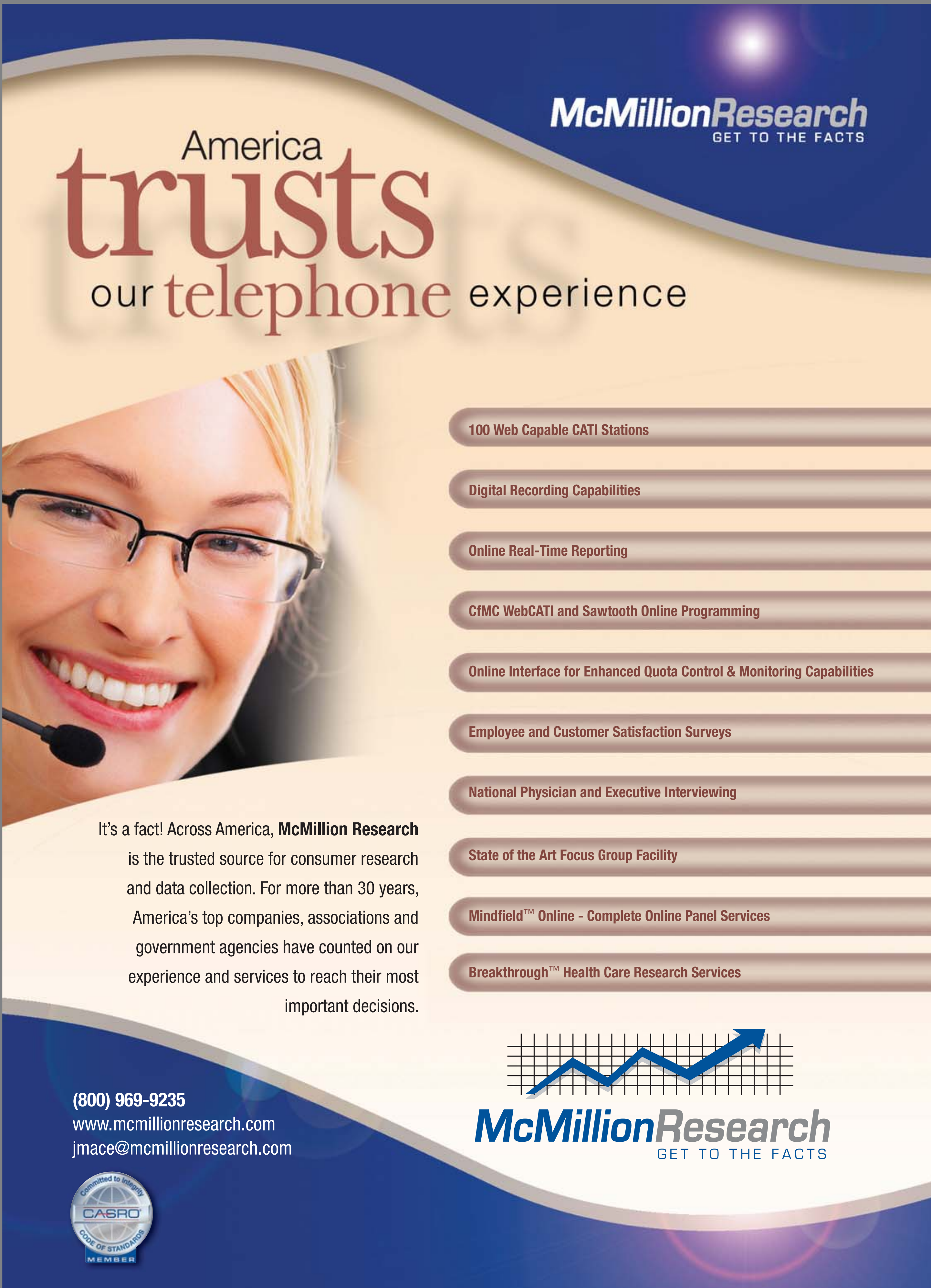
So some of the criteria above were designed to combat specific challenges the research department is facing. It is not uncommon, for example, for research to be engaged at the last minute as a tool for validation rather than as a tool to drive decision-making.

Two of the above screening criteria help with this problem by 1) addressing decisions where there is a high level of uncertainty about what to do and how to proceed, and 2) by beginning early in the decision-making process. For each challenge the research department is facing, there is probably a corresponding screening criteria that can provide leverage and serve as an anchor for dealing with that problem.

Step 3: Implement and educate about the process.

The first step is to get input from senior management as to whether they feel the screening criteria are appropriate, what else they would add, remove, etc. Alignment with senior executives is critical to get people to adhere to the process. It is easier to implement this as a technology-based solution using an online survey tool and this also allows for storing research requests in a central location, which may make it possible for requests from multiple business units to be combined or eliminated.

The final step is to educate internal clients on the value of the process. For example, Research Innovation and ROI Inc. developed a training Webcast called "Using Research to Accelerate Personal and Professional Success" explaining the value of each of the above set of criteria to both the organization and to the personal success of the person requesting the research. People must believe the process is a win-win for all concerned. | Q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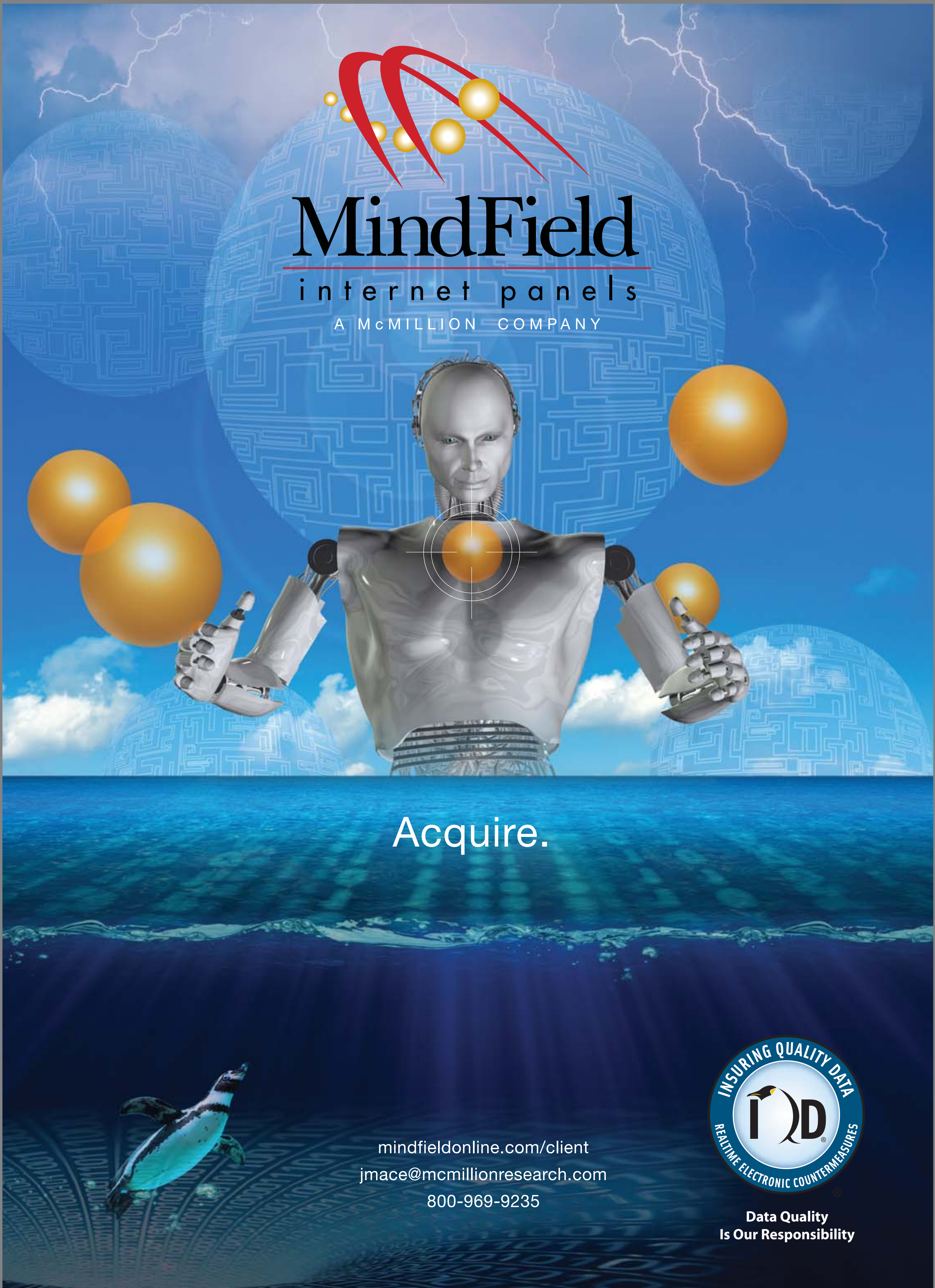
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Is Our Responsibility

By Michael Carlon

The silos must go

Rethinking the role of shopper insights

I started my career in shopper insights while working as a consumer and market insights manager at Unilever Home and Personal Care in Greenwich, Conn. While I was hired to manage custom research for our relationship marketing team, I quickly saw where the future of marketing insights was going: shopper insights. Within one year of joining Unilever in 2003, I left a role I was extremely comfortable in to work in a position that was, for lack of a better term, unstructured. Whereas my colleagues all had standardized approaches and tools they could use to address marketing issues, those of us working in shopper insights were more or less making it up as we went along.

As with the advent of online research, it was okay to fail so long as we learned from it. And fail we did - back in the mid-1990s with online quantitative and qualitative methods and again in the early-2000s with shopper insights. In both cases though, the learning that came from failure was documented and our approaches were strengthened.

Most of my work today as a supplier falls under the rubric of shopper insights. As such, I would like to share a point of view on where I feel shopper insights needs to evolve in the future.

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snapshot

Researcher Michael Carlon suggests that restructuring shopper insights departments to align researchers by category and encourage collaboration between researchers within a category could strengthen shopper insight ROI for manufacturers and retailers.

Manufacturer-retailer relationship

When you first think about it, retailers appear to be the most significant beneficiary when true shopper insights are uncovered. Consider a product like deodorant. It is something that just about everybody uses and you only need to purchase so much of it in any given year. If Retailer A uncovers an insight into how shoppers shop for deodorant and uses that insight to improve its assortment, layout and in- and out-of-store marketing, it may help win deodorant purchases from Retailers B, C and D. That is great if you are an employee or shareholder of Retailer A, but what does the manufacturer gain? Sales may grow in one customer but sales decreases are seen in others. While it is a given that some customers are more profitable for the manufacturer than others, outlet shifting does not necessarily lead to long-term growth for the manufacturer; that typically only comes from winning share from your own competitors.

So why is it that most manufacturers fund shopper insights programs for retailers? Well, big manufacturers have more money to invest in insights than retailers do. Additionally, there is a certain amount of goodwill built when a manufacturer invests in helping the retailer uncover an insight that will help to grow the category. No matter what business you are in, building a stronger bond with your customer always makes good business sense and shopper insights is often seen as an avenue for manufacturers to accomplish this.

Takeaway No. 1: Manufacturers have an opportunity to grow share from competitors through shopper insights but most are not taking advantage of shopper insights to grow net brand sales.

Consumers not classified by retailer

Having worked amongst many different classes of trade (e.g., mass, drug, grocery, value and club), I've concluded that all retailers within and between those classes are convinced that their shoppers are unique from the total U.S. population.

When I was on the client side, I can't tell you how many times I heard a retailer push back some research we presented on new or future innovation. The most common objection was, "But how do we know these findings are really reflective of our shoppers?" Most of the time, concept testing was done on a national level and also among core brand targets to evaluate how accepting the brand's

target was of the product under consideration. Ten years ago we never segmented concept reactions by retailer preference. When we started to receive pushback from retailers about how their shoppers reacted to the innovation, we started adding booster cells of various segments to concept testing (e.g., a cell of Walmart customers, Target customers, Walgreens customers, etc.). This was one very early and basic application of shopper insights.

However, having spoken to literally thousands of shoppers over the last eight years, I constantly hear that someone who shops at Walmart also shops at Target, Family Dollar, Walgreens, Costco, etc. These qualitative observations are confirmed by household panel data, which shows that just about everyone shops just about everywhere. Consumers choose retailers based on convenience, sales, coupons, etc. Someone making under $30,000 per year who purchases a national brand of body wash at Dollar General also purchases it at Walgreens when the price is right.

Takeaway No. 2: Retailers cannot lay claim to any one shopper, as consumers do not classify themselves by the stores at which they shop. They choose stores based on what makes the most sense for them at any given time.

Retail vs. marketing

While most large manufacturers are building shopper insights teams, they are often separate from brand teams. The reason is simple: Retail is seen as a separate domain from marketing. Communications development, media strategies and product innovation are on one side of the aisle and anything dealing with sales is on the other.

This is compounded by brands focusing on consumer targets who may or may not be the actual people who purchase the product. For example, a new deodorant product may target college-age males yet the actual user may be middle-school-aged boys while the purchaser is a 45-year-old woman (i.e., mom). Shopper marketing teams, on the other hand, have to target the people who actually purchase the product.

This may lead to some tension between the two groups. Hypothetically, a shopper insight study may uncover an insight that suggests a certain packaging characteristic (structural or graphical) is driving category growth. Since shopper insights, or shopper marketing for that matter, does not drive innovation throughout an organization, this finding may be downplayed (or ignored, in the worst-case scenario) in a company whose culture dictates that innovation be driven through other channels. This results in a lost opportunity to make a greater impact at the shelf and therefore grow brand share from competitors.

Takeaway No. 3: Net brand growth through shopper insights is often encumbered by organizational structures.

A shift in thinking and structure

I do believe that shopper insights

can help grow brands within a manufacturing organization but it takes a shift in organizational thinking and structure to do so.

Retail cannot remain a separate domain from marketing. Understanding the stimuli that impact brand choice at the shelf must be taken into consideration when planning a brand redesign or new product introduction. This means that silos between brand marketing, brand development and shopper marketing must be broken down. I believe this will lead to alignment of messaging across all channels - including retail - and more openness to adding the shopper's voice in product innovation; helping the manufacturer's brands stand out more on the shelf; or fulfilling needs that certain shopper segments have.

Once these various marketing teams align, the internal researchers who support those teams must be restructured. Most shopper insights teams are minute in comparison to their brand development or brand marketing counterparts. While one brand may have multiple brand researchers assigned to it, a shopper insights resource may be spread across multiple categories each with multiple brands in the portfolio.

Aligning differently

This resource imbalance must be addressed in order to get the most out of a shopper insights discipline. One way of addressing this is by aligning the research department differently. Researchers should not be broken out by brand or by class of trade but by product categories. Within each category, there should be researchers focused on development (e.g., those who focus on classic brand development disciplines of communications development, ideation, concept testing, packaging, etc.) and researchers focused on shopper insights who are dedicated to understanding category and shopper dynamics across various retail classes of trade. These researchers, now aligned by category, must sit together and work collaboratively to identify ways in which the category can best be activated in the marketplace as a whole as well as at retail.

The current model of shopper insights that I see in most of my customers is not sustainable. Most are broken out by class of trade and are responsible for way too many brands or categories. By aligning researchers by category and encouraging collaboration between researchers within a category, I believe organizations will get more return on investment from their insight efforts. While retailers will still appreciate the shopper insights manufacturers help them uncover, manufacturers themselves may also be able to apply shopper insights in a way that leads to share growth across all classes of trade. | Q

An alternative to ethnography

Find out why Michael Carlon feels video diaries can one-up standard ethno studies by entering article ID 20080408 at www.quirks.com/articles.

shopper insights

On the path to understanding

How the shopper is changing the retail and research landscape

By Roxanne Salen
and Susan Stickling

For the past several years, the market research industry has been abuzz with two words that have changed the way researchers and manufacturers view their customers: shopper insights (SI).

Shopper insights has moved quickly across the CPG and retailing landscapes in the past decade as marketers seek to understand the shopper's entire path to purchase and increase sales. From their home (including how they use and view products; advertising media that sparks their interest in new products; how and when they decide where to purchase the product) to the store (including aisle and shelf navigation; product attribute trade-offs; and so on), shoppers are constantly making purchase-related decisions. Shopper insights seeks to holistically comprehend the shopper's environment, surroundings and influences to learn from and capitalize on all of the choices they make along the way.

To better understand the role of SI, we spoke with shopper insights practitioners from Clorox, PepsiCo and WhiteWave Foods to glean their thoughts on the origins, present state and future of shopper insights.

Emerged organically

Shopper insights in its current form is a function of the market research department in many companies; yet shopper insights emerged organically from the need sets and relationships between CPG sales forces and retailers. Retailers needing new and actionable insights into their shoppers approached field sales teams and category managers of several different companies with areas of questioning and research opportunities. Some forward-thinking Fortune 500 companies began transforming field functions into a new appendage of market research. "You had a morphing of category management and the merging of market research with that," says Chad Marston, director of platform and insights, WhiteWave Foods, Broomfield, Colo.

Sales and category management brought their needs to researchers and thus shopper insights found its home in market research. Yet it carved out new niches and methodologies and is proving itself as a valuable tool for creating long-term strategies and enhancing manufacturer relations with retailers. "Moving from category management, [shopper insights] is less analytical regarding sales and thinks more about the shopper and shopper decisions and how we can influ-

snapshot

The authors spoke to practitioners from Clorox, PepsiCo and WhiteWave Foods to investigate the current and future state of the shopper insights function.

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ence them," says Stephanie Sandlin, sales strategy and insight manager, WhiteWave Foods.

Blurring the line

While shopper insights has grown into its own specialized genre of research, definitions vary and it often involves blurring the line between viewing the customer in shopper mode versus consumer mode. Below are some definitions and thoughts we collected on the meaning and importance of SI:

"I would say the best definition [of SI] is understanding the how, the why and the why not of shopping emotions and behaviors," says Neeraj Kalani, director, global consumer insights, PepsiCo, Purchase, N.Y.

"Developing better understanding of the shopper's path to purchase from at-home, pre-trip behavior to picking the product ... and not stopping there. It's then about understanding the shopper's path to re-purchase," says Ryan Dickman, shopper insights, The Clorox Company, Oakland, Calif.

"What I historically thought my definition [of SI] was has become more muddled simply because the retailer is really just the final battleground ... but it encompasses everything that consumer research and user research works to understand. And when you then add the layers of online shopping and the digital world, well, it's sort of like, where does the shopper begin and the consumer end? I think it's a very gray area," says Renee Hammond, associate global insights manager, The Clorox Company.

"What is interesting about SI is the left-brain right-brain connection. You have a data set, information and usable points of reference meshed with an interpretation, the gray area of saying, 'How does that info become real and actionable?' And to me, that's what SI brought," says Chad Marston, WhiteWave Foods.

"SI leads insights about shopper behaviors in our categories to influence retailer strategy and execution. This enables actions across the 3Ds: desire [marketing], decide [sales] and delight [innovation]," says Jennifer Nuckles, strategic shopper insights manager, The Clorox Company.

Why the shift?

So why has there been this shift toward looking at the customer in shopper mode versus only as a consumer? Shoppers are now active participants in the decision-making process rather than passive consumers receiving messages. They are more price-conscious and empowered than ever, with multiple resources available to research and read reviews as well as to price-shop both outside and inside the store and make swift judgments in value.

Others say that a person in shopper mode can be quite different from the consumer of the product. Shoppers may have different emotions based on the type of shopping trip and shoppers for the same product can vary dramatically by channel. For these reasons, understanding the shopper and what is motivating him or her is imperative in ultimately driving sales. The idea is that by understanding consumers when they are in active-shopper and active-decision-making mode, the manufacturer and retailer will see increased sales.

Enhance abilities

SI also comes with its own set of applicable methodologies. In the SI realm, qualitative work steps away from seated focus groups and instead leads customers to mock shelves. One-on-one interviews have evolved to anthropological studies in ethnography and now incorporate shop-alongs. Several new technologies have also surfaced to enhance the researchers' abilities to explore shopper behavior via simulated shopper settings. Virtual shopping allows the shopper to navigate aisles and the shelf space in an online environment and hot-spot technology helps optimize the in-store environment by tracking movement throughout areas of the store. "These more emerging technologies such as hot spots and online virtual shopping are very helpful to retailers because they allow us to reach shoppers without disrupting the daily course of business," says Nuckles.

Although most would agree that the true in-store setting is the most ideal space to conduct shopper research, these simulated shopping techniques allow for real-time research that can emulate the experience of the consumer in shopper mode. While retailers have at times preferred the research to be done in-person at their store, the trade-offs between price, value and accuracy remain important considerations.

Though virtual technologies do not exactly replicate the shopper's experience, they can effectively model and predict new shelf arrangement schemes, end-caps and cross-category placement. "[Virtual shopping] is a nice-to-have methodology and should be used as an aid to other foundational research studies," says Kalani.

These alternative technologies are largely found to be credible, though managers still find themselves vetting the best suppliers from a crowded field. "I embrace innovation on the supplier and manufacturer fronts in developing new tools and methodologies but at the same time, I want to be selective in which ones I choose because I know there are a lot out there," says Dickman.

Immediately actionable

Most of the companies we spoke with say that shopper insights is well-embraced within their respective organizations and is often the driver of strategic decision-making. However, the results of SI are often expected to be immediately actionable and beneficial - charging SI with a substantial task. Further, there is sometimes a disconnect between consumer and shopper research, as each have their own separate agendas, objectives and end users.

While some CPG companies have or intend to create a role for someone to link the various components of shopper and consumer research, not all have achieved this to the extent desired. "The marriage between shopper and consumer insights has not fully happened yet. For consumer insights folks, shopper is still an afterthought," says Kalani.

Furthermore, the objectives of shopper versus consumer research remain somewhat out of sync. While consumer research encompasses the more traditional market research disciplines, including brand research, SI seeks to understand why these brands are appealing or not appealing to the shoppers and why sales do or do not result.

Leverage findings

While SI started at the retailer level, research now often originates from manufacturers who are looking to leverage findings to enhance and build cross-channel and cross-category purchases. Savvy manufacturer-side researchers are always looking for ways to project findings across multiple channels and build a base of foundational knowledge to share and continue building upon.

In fact, retailer relations are quickly mentioned as one of the key benefits of conducting shopper research. "I think retailers already get it. They are closest to the shopper so they really seem to hunger for SI and are very open and appreciative of anything that you can bring them," says The Clorox Company's Hammond.

There is a knowledge exchange that results in greater opportunities for both the manufacturer and the retailer. The retailer is able to build bigger baskets while the manufacturer simultaneously increases sales.

"I think there are a few benefits [of having an SI department]," says Kalani. "One, you embrace a capability that helps build better partnerships with the retailers on the basis of understanding what matters to them the most: shoppers. Two, it creates internal awareness among different functions that truth is at the shelf. Three, it pushes Tier 1 companies out of complacency mode and gets them to understand the path-to-purchase phenomenon. Retailers have limited funds and to do a lot of qualitative and quantitative research is unreasonable so they are looking to partner with companies who actually bring these burning issues to the front."

Manufacturers typically know a retailer's outlook on SI and whether it is embraced and accepted within the retailer organization. When the retailer is a proponent of SI, a successful manufacturing SI department will prove itself as a credible partner by establishing trust and a solid track record of usable insights. "Part of having a good partnership with retailers is involving them from the inception of the research to the end," says The Clorox Company's Nuckles.

"I can see retailers opening doors [to in-store research] more down the road because as long as it's done well, it benefits everyone involved - shopper, retailer and manufacturer. Doing it well means holding all involved parties to higher standards of preparedness with respect to having well-articulated business issues and best-in-class accompanying research plans," says Dickman.

Resounding trends and outcomes

When asked about the future of shopper insights, we heard several resounding trends and outcomes, including: a better understanding of the digital shopper (including direct-to-consumer) and new in-store concepts as well as broader adaptations and applications of SI among retailers, manufacturers and suppliers alike.

Most retailers are aware of the value of well-executed shopper research, though we will likely see an expansion of retailers conducting shopper research both on their own and by partnering with manufacturers. After all, a retailer's knowledge of its shoppers ultimately leads to knowledge of how to drive sales.

Brick-and-mortar retailers will need to continuously adapt, innovate and prove their value as the rise of digital and online access for shoppers continues. "Digital is a key focus area for our consumer and shopper promotion group. Digital includes everything from Web sites to downloadable and printable coupons, text-to-win, text alerts, etc. We've seen this rapidly changing and need to address this in order to be true to our shopper behaviors," says Nuckles.

Some examples of innovations include the use of smart carts, informational kiosks, in-store television advertising and an increased presence of scanable QR codes and UPC symbols. "The whole digital space is going to be huge and specifically how people shop with mobile technologies and how that relates to in- and out-of-store shopping behavior. Moving from home to store and everything in between, shoppers will increasingly be always connected," says Dickman.

Shoppers now have mobile phones and devices at their fingertips and can choose which messaging they are interested in as well as price-shop and compare while on the go. This means the retail landscape will change; the look and feel will adapt to the needs of educated, savvy and mobile shoppers. "In-store environments will continue to evolve to cater more to an increasingly sophisticated, increasingly busy shopper. I think mobile technologies will be directly imbedded into this - making shopping more efficient and more intuitive," Dickman says.

Many retailers are choosing to proactively create brick-and-mortar environments that appeal to and tap into the emotional and behavioral connections shoppers have to their in-store experiences. "We've had a relatively stagnant retail paradigm for a while now. I think this will start to change quite rapidly - even in the next five to 10 years - as we see new store concepts emerge, from smaller formats to more targeted concepts around particular shopper groups," Dickman says.

Third-party research suppliers will continue to gain knowledge and resources in the realm of shopper insights. More of these firms will serve as conceptual partners - something some manufacturers find is currently lacking. "There are a lot of suppliers in the shopper space that are just adapting consumer capabilities to a growing function, so this is an area I expect to change," says WhiteWave Foods' Marston.

Suppliers need a deep understanding of the nature of SI so that they can effectively partner in the design and execution of successful research projects. Further, suppliers must continue gathering knowledge and seeking out new methodologies for researching the digital shopper and the on-the-go shopper. "Most supplier shops have focused on more traditional brand insights. Suddenly, suppliers are shopper experts. I do not find this particularly helpful in that it makes the manufacturers' job harder in knowing who to partner with. If suppliers were more up-front about what they are experts in, manufacturers could more effectively partner with suppliers based on their expertise. This strategy may benefit suppliers in the long run because they stand for something rather than standing for nothing," says Dickman.

And of course, there will be greater adoption on the manufacturer side as well. This includes more SI departments, as well as wider integration of SI within various organizations. Many think shopper insights will continue to get more recognition for the value it can bring to the table. Further, while it will remain separate from traditional consumer research, there is the potential for great synergy by linking shopper insights and traditional research.

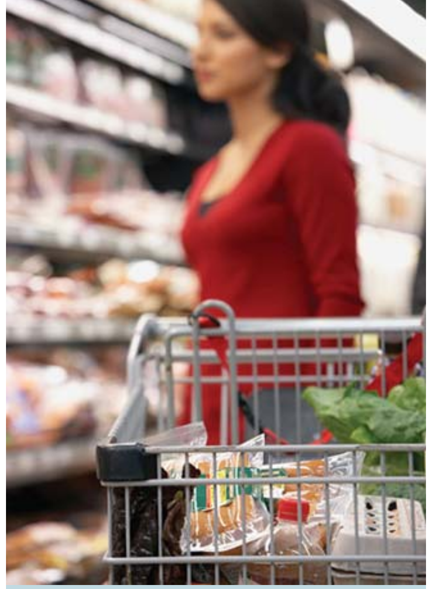
Vital and evolving

The modern-day shopper is empowered; he or she can choose which messaging is personally relevant, can research and compare products before selection and can price-compare at home, on the go and at the shelf. Given the enhanced role of the shopper, shopper insights is and will remain a vital and evolving field of research. Now it's up to the retailers, manufacturers and researchers to continue to learn, understand and act upon the needs of the ever-changing shopper. | Q

shopper insights

Putting the shopper first

How research can connect shopper attitudes and behaviors



By Christopher D. Ratcliff and Andrew L. Zoota

The burst of interest in shopper insights has been a recent phenomenon in marketing research. It's not that researchers haven't been concerned about the shopper but we have begun to realize the importance of the person doing the shopping versus a traditional focus on the consumer.

This shift in focus has been motivated by the need to drive not only sales for the CPG, food or durable goods company, etc., but also by a pressing desire from the retailer to enhance category purchase. This need to drive category purchase has been critical in the adoption of a stronger focus on the shopper. After all, this is the person making the purchase (we refer to a mom throughout, but similar principles apply for the male shopper). Mom may be influenced by others in the household but at the end of the day, she makes the purchase decision - often in mere seconds.

For many, especially in the early stages of shopper insights, the focus was on in-store or near-store experiences and how these experiences affected the purchase decision. The depth and breadth of shopper insights, however, has extended to include experiences that occur far away from the store. Understanding Mom and how her behavior at the shelf is driven by outside factors in her life is crucial to developing the correct marketing plan to increase product velocity.

To begin, let's define shopper insights. Shopper insights focuses on the impact of the personal biases, outside influences and shopping environment and how they motivate the consumer to make a purchase at the shelf.

Personal bias is an important component of the shopper marketing experience. It is anything that the shopper brings to the retail environment that influences the products purchased. She comes with attitudes, behaviors and other individual factors that will impact the decisions made in the store. Within mature categories, these biases may have been formed throughout her life but they could be impacted by the introduction of stimuli both before entering the store and while perusing the aisles. For new products, she may be influenced entirely by what she sees when in the store.

Let's consider the Mom who is buying juice for her children. She may come into the store with the desire to buy 100-percent juice with no additives, colors or preservatives. This may serve as the first lens for purchase that she includes in her

snapshot

This article discusses the impact of personal biases, outside influences and shopping influences on a shopper's purchase decision and how research can minimize the discrepancy between shopper attitudes and shopper behaviors - and improve category purchase.

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consideration. Once at the shelf, a flood of information and other considerations are presented. She begins to consider in more depth who she is shopping for and the fact that they want a "character" juice. Next, the size of the package influences her decision. Finally, the type of packaging comes into focus. Her options are limited very quickly. What compromises must be made to complete the final purchase? How can she locate what she is looking for at the shelf and include all of her shopping criteria? How will her attitudes about the category match (or not match) the final purchase behavior?

Obviously, each of these factors may influence her purchase decision or may derail the purchase completely. As researchers, we must be able to identify each of the drivers and measure its impact to help sell our products. Unfortunately, we often fail to recognize the psychological motivators of purchase and move straight to the tangible attributes of our products.

Outside influences may take the form of others or may be pressure that the shopper is dealing with herself. Influence of others - often from the children or significant other - and the need to fulfill the desires of other household members who are being purchased for serve as strong purchase motivators. Although Mom holds the ultimate veto, humans, in general, have a fundamental goal of being liked. For most, being liked is something we are concerned with; we want others to have a good impression of us. For that reason, the shopper will acquiesce to some extent because of what is important to the person for whom the item is being purchased. However, she is pushing the basket in the store and placing items in it, therefore she has the final say.

Back to the juice example, Mom may only see a handful of sugar-filled juice options that have characters so she excludes that shopping criterion in her selection. She may want to fulfill that desire of her kids (or perhaps her husband), but she cannot locate a product that meets another more important criterion (100-percent juice).

Shopping environment includes all aspects of the shopping experience from how the shelf is set to in-store communications to the actual product offerings. All of these factors weigh heavily in determining what will be purchased, how often the retailer will be shopped and what opportunities exist to create strategic advantage for a retailer.

Decrease the disconnect

Unfortunately, the attitudes of the shopper and the behaviors that are displayed may not always seem to match. This inconsistency is what we seek to understand through shopper research. Specifically, our attempts to create more harmony between the shopper's attitudes and her ultimate shopping behavior give us more success in marketing our products. It also helps make our retail partners more successful in selling not only our products but the category as a whole. Thus, our goal is to decrease the disconnect. To do this, we must understand the shopper (outside and inside the retail environment) and what drives her ultimate purchase.

This insight helps us to create the right products, promotions, pricing and planograms to influence the purchase at the shelf. We must consider what she is looking for when she goes into the store; what she sees when she is at the shelf; what she walks out of the store with; and why she made that decision. The number of life influences that impact this purchase decision is obviously quite large but we can drill down to glean how she arrived at the purchase decision by examining the psychology of the shopper at each stage in the process.

Series of research initiatives

A series of research initiatives aimed at understanding the shopper in all aspects of her life will help us to arrive at the correct marketing decision. The research should include the following components:

Ethnographic research with the consumer to understand how she decides, uses and replenishes the category of interest. This should be an intensive review of her life, with and around the category of interest. How does she think about the category? How does she (and her family) use the category? Who influences the purchase? How do they influence the purchase? What substitutions are made within the category and are these substitutions deemed acceptable?

The insight from this phase of the research drives our product development, marketing and planogram design exploration. It also provides insights into the pleasures and pains that exist with the category and drives an in-depth understanding of how the consumer acts upon them.

Ideation to explore how to enhance the pleasures and minimize (or eliminate) the pains is the natural extension of ethnography findings. This phase of the insight planning process allows the marketing team to drive new ideas that will meet the shopper's needs. The goal is to use the information gathered in the ethnography to drive new (or extended)

product, promotion and planogram offerings that help make the shopper's life easier by lessening the disconnect between consumer attitudes and actual behavior.

We are seeking to help the shopper reduce the dissonance between what she wants to buy and the desires and wants of those for whom she is shopping. When we make our brands meet the needs of her and her family, we have made the brand a more crucial aspect of her life. This leads to increased loyalty to the brand and generally higher velocity.

Validation research to understand if the ideas generated fulfill the needs that were identified in the ethnographic research. This may include both qualitative and quantitative research.

The qualitative research may take the form of a concept refinement exercise. This is an iterative process in which small groups of target consumers review concepts and provide input about how to improve those concepts to meet a specific shopper need. During this process, concepts are rewritten and re-illustrated based on what the shoppers want from the product. At the end of a couple of groups, a breakdown session with the marketing team to further refine concepts is included. The breakdown process uses the consumer input to further enhance the concepts. These enhanced concepts go through this same process again to fine-tune the offerings.

Once the concepts are complete, they are taken back to the consumer again through quantitative concept testing to understand which of the offerings meet the needs of consumers. The most impactful concepts are then taken into simulated shopping environments (either in vivo or online). The specific approach will be driven by the need of this component of the insight planning process.

The in vivo testing of the concepts is an important part of the process to tie learnings back to the initial research - in-store ethnography. Understanding reactions to the new product on the shelf drives minor refinements to the product but more importantly, it drives the quantitative testing through placement options and the type of in-store promotions that may be most impactful on purchase.

Generally, understanding shoppers' reactions to pricing, promotion and planograms is achieved through an online test of the concepts inserted among the existing category. By varying price, point-of-sale and placement combined with good category knowledge, we can understand the volume of the new product.

A more complete picture

Product and category management must be driven by what the shopper expects and her attitudes, blended with how the person who ultimately consumes it uses the product. This shopping experience information provides a more complete picture of how to market products to make them successful at retail. | Q

Better packaging

Enter article ID 20100105 at www.quirks.com/articles to read Scott Young's take on getting shoppers to respond to packaging.

shopper insights

Try before they buy

Winning at retail with virtual shopping research

By Valla Roth

Is your business facing any of these questions?

"Are we ready to pitch the new shelf arrangement to Kroger? Will they accept it?"

"Should the new line extensions be placed with the parent brand at Safeway or in a destination with similar products? How does it affect conversion?"

"Which brand bundle on display generates the most incremental volume at Target?"

"Should we start flowing in the new packaging graphics at Costco and Sam's?"

"Should we pull the trigger to increase pricing in the grocery channel? How will that affect purchasing of our brand? Will we lose volume? To whom?"

"Walmart is about ready to de-list our brand. How can we convince them they should keep it?"

"Is the retailer proposing to place their private brand side by side with our brand? How can we leverage our brand equity and save the category from trade-down?"

If shopper marketing issues such as these sound familiar, you are not alone. Shopper marketing is becoming increasingly important as the media landscape factures and the social influence of Web sites, blogs, Facebook and Twitter explodes. Yet, for many categories the final buying decision is made in the store, at the shelf or at the end-cap. Thus, the in-store shopping experience remains a vital marketing opportunity.

Metrics and insights

One tool for obtaining the necessary metrics and insights to screen and optimize in-store initiatives is virtual shopping. The information gathered measures both shopper behavior and the why behind it, to allow for better decision-making and to make the case for retailer activation.

A virtual shopping study has four steps:

1. Pick the appropriate shoppers. It may be based on category usage, brand usage, the retailer's segmentation model, demographics, regionality, etc., or some combination of them.

2. Recreate the retail environment. Set the appropriate context by putting them in the buying mode in the channel or specific retailer.

3. Measure the sales impact. Allow the shoppers to navigate in the store and interact with the products as if they were actually shopping. Provide the experience of picking

snapshot

The author explains how virtual shopping research works, outlines where it's most effective and provides best practices for its use.

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up a product, looking at all parts of the package and deciding how many of each product, if any, to put in their baskets.

4. Understand the whys behind the shopping behavior. You can do this with quantitative diagnostic tools that evaluate what shoppers saw/noticed in the "store" as well as their perceptions of the shopping experience and key brands. Real-time online chats can provide further qualitative diagnostics.

Develop winning strategies

Below are five applications for which virtual shopping research provides data to develop winning shopper marketing strategies:

Arrangement/Assortment: The right mix of appropriately-arranged SKUs improves category sales and shopper satisfaction. First, determine the right assortment of products for the right target shoppers at each retailer. Then the optimal arrangement and flow can be put in place. A leading manufacturer in the category often partners with the retailer to create several alternative planograms based on how shoppers view the category. Virtual shelf sets are made from the planograms and tested among shoppers in a virtual shopping study.

Arrangement case study - Hall's cough drops: Cadbury used virtual shopping research to determine that a vertical cough drop shelf set (brands and private-label arranged in vertical blocks) was much more effective than the existing checkerboard layout (private-label SKUs adjacent to branded SKUs). The new planogram grew the category as well as Hall's and private-label sales and shoppers found it easier to shop. These results provided the impetus for retailers to reset the section and they aligned very closely with in-market data.

Alternative locations: When a new brand or flanker enters the market, shelf placement is not always apparent. Should a flanker be next to the parent brand to take advantage of the equity umbrella or should it be with other competitive items in a subsection? The answer can vary by category and even by retailer.

Alternative locations case study - Nestlé ice cream cups: By using virtual testing to replicate Safeway and Kroger frozen foods departments, Nestlé found that ice cream cups should be placed together in their own dedicated area rather than adjacent to their parent brands. This learning prompted the vast majority of retailers to create an ice cream cups subsection, resulting in incremental space and strong cup sales growth.

Pricing: Having the right price affects the bottom line and positions the brand to the shopper in the context of competitive brands. Virtual shopping can be used to gauge customer reaction to price increases before they are implemented. What-if scenarios can be created where competitors do or do not follow the price increase, something that can't be a priori tested in the market. Alternatives can be created where both the pack size and price are simultaneously varied in different ways to optimize the size/price relationship. ROI on promoted pricing options can be determined, such as evaluating various discount levels or different multiple purchasing strategies.

Promoted pricing case study - Evaluating many what-if scenarios: A CPG manufacturer wanted to test potential promotional scenarios - over 40 of them - varying the promotions of its brands and those of its competition. Testing the scenarios using virtual shopping, it discovered that discounting the largest size had a more positive revenue impact than discounting the smallest size, which had been its traditional tactic.

Packaging: A package can be thought of as on-shelf advertising that is on-air 24 hours a day. It's important that it works hard for the brand, especially in the context of competitors that are only inches away. Virtual shopping determines whether a packaging change will affect the brand's sales, the most important measure of success. It also provides feedback on whether a new package breaks through the clutter, can be easily found at the shelf and communicates the brand's messages to increase brand equity, all in a real-world competitive context shelf setting.

In-store communications: Circulars, temporary price reductions, bundled displays, shelf talkers and solution selling can have a significant effect on short-term volume. Displays with different combinations of brands and varying unifying messages can lead to a wide range of incremental sales. Virtually testing several alternatives prior to implementation allows for experimenting with more outside-the-box programs that may be home


I drink beer and
love taking apart
car engines
on the weekends

runs in the market but too risky to try without shopper feedback.

Maximize the effectiveness

With the growth of shopper marketing programs in store, virtual shopping research is an excellent way to gather shopper insights to maximize the effectiveness of these initiatives. Virtual shopping studies can be used to screen and optimize alternatives prior to an in-store test and in some cases can be used in place of an in-store test. It depends on the magnitude of the business issue. In recent years, we have found that retailers have become more confident in virtual shopping research findings and are resetting their shelves and activating marketing programs based on that information.

Virtual shopping studies have advantages over traditional concept tests. First, virtual shopping simulates behavior, going beyond attitude questions such as liking or price value. Second, the real-world competitive context of virtual shopping replicates actual shopper buying decisions. And third, virtual shopping measures category growth not just estimates of brand shares or merely intent to purchase for a brand. This provides key insights for both retailers and manufacturers.

And, compared to in-store tests, virtual tests are more controlled. There is no need to worry that the shelves weren't restocked or that a competitor bought all of the product off the shelf. In addition, physical products aren't necessary, avoiding the production-related problems that can accompany pre-launch tests.

Virtual shopping studies can be more effective than relying on historical data or informed judgment as to which program will work best. Even sophisticated approaches such as marketing-mix modeling rely on the past, which may not be a good indicator of shoppers' future behavior. Using history to generate alternative approaches (such as alternative planograms, pricing scenarios, display alternatives) is a good start. Testing them within a competitive context, with an eye to the future, is the appropriate next step.

Critical components

Whether you have yet to conduct your first virtual shopping study or you are very experienced with them, there are critical components to consider as you design a study.

Represent the channel or retailer. Shoppers' mind-sets and purchasing behavior can widely differ by channel or retailer, so with virtual shopping, one size doesn't fit all. Choice sets, aisle layouts and price points vary by venue and can have a large effect, especially in categories with strong private-label and regional brand presence. For example, a well-known analgesics manufacturer wanted to assess the viability of introducing a flanker brand. To make an informed decision, it conducted the online virtual testing in Walmart, Target, CVS, Walgreens and Kroger virtual stores.

Create the right competitive context. Large categories such as ready-to-eat cereal, ice cream or carbonated soft drinks have hundreds of SKUs. While they can be accommodated in many virtual shopping platforms, are they all necessary? It depends on the objective of the study. If the issue is at the category level, such as assortment and arrangement, having the shopper interact with the entire category is imperative. Measuring category growth is a key deliverable. If the objective is at the brand level, such as a packaging change, then showing the entire category may not always be necessary.

Target the appropriate shopper segments. Who you test among is just as important as what you show them or what information you collect. Respondents must reflect the population you intend to reach. In the case of online virtual shopping studies, Internet usage is now so widespread that attaining representative samples is no longer a concern for most business issues. In most cases you want to screen for category users because most shopper efforts are designed to grow share. In some cases a broader sample is appropriate, such as for a breakthrough product in an emerging category. It's also important to test among shoppers who shop the channel or retailer portrayed in the study.

Take advantage of every strategy

Against a backdrop of a changing media landscape and increasing competition, product makers and marketers must take advantage of every strategy to inform their decision-making when it comes to in-store marketing and research. Virtual shopping research is an important tool in the shopper marketing arsenal. It measures consumer behavior in a realistic environment and can lead to insights that translate into winning programs in the marketplace. | Q

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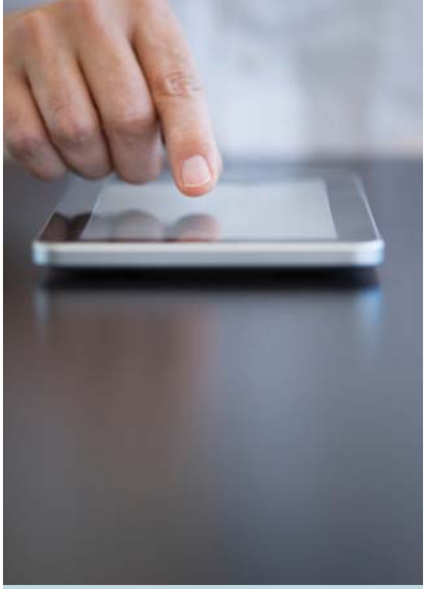

By Kristin Luck

As a planet, we've become people on the move - with millions connecting on-the-fly through mobile devices ranging from smartphones to tablets. In fact, 2011 is widely being hailed as "The Year of the Tablet" and Forrester Research predicts that this year, tablet sales in the U.S. will double and that by 2015, nearly a quarter of all personal computing devices will be a tablet.

This rapidly changing section of the consumer market has impacted market researchers as mobile research technologies and methods must be developed at nearly the same speed as new mobile devices. This presents several challenges to us as market researchers:

- How can we use technology to our advantage to connect, engage and deliver actionable results in the mobile universe?
- How do we develop best practices for mobile research design and implementation?
- What issues do we need to be aware of as we embrace new mobile platforms and dive into technology development?

Addressing these issues from a research perspective means we have to first understand what mobile marketing is and how it's changing the way marketers communicate with consumers.

Met on their own turf

Mobile devices create an expectation for nomadic access to everything and anything we may want or need. The increased demand to be met on the move has changed the face of communication and is swiftly changing the face of market research. Respondents expect to be met on their own turf - through their mobile phone or device.

With the advent of more robust mobile devices such as the iPad, which sold more than three million units in its first 80 days on market, reaching people wherever they are has become even more possible and more important.

IPad aside, the International Telecommunication Union recently reported there were five billion mobile subscribers worldwide at the end of 2010. The ubiquity of mobile phones, their presence in the daily lives of users, advances in the wireless networks and improved handset technology all are reasons that marketers are

snapshot

Kristin Luck offers some best practices for mobile research to help practitioners keep the respondents in mind and avoid letting technology distract us from meeting their needs.

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becoming hooked on the idea of mobile marketing. In fact, mobile marketing is one of the fastest growth areas in media adoption.

Mobile marketing and advertising will grow almost tenfold over the next five years, from $1.5 billion to $11.5 billion, according to eMarketer. In addition, many of the top social networking sites have demonstrated consistent rapid growth in their global user bases. Facebook.com, the global leader among social networking sites, now has more than 600 million active users, and 30 percent of those users are accessing the site through their mobile devices. Those who access the site from a mobile device are twice as active as those who do not. This is a key indicator in the power of mobile in capturing an active audience.

Here to stay

Mobile marketing refers to marketing campaigns delivered via text messaging (SMS), multimedia messaging (MMS) or wireless application protocol (WAP or what most of us think of as mobile Web browsing). Mobile marketing can also be delivered via keywords or shortcodes. (For example, "Text DEC [keyword] to 6622 [shortcode]." If you've ever been to a professional sports game you've likely seen an example of this on the JumboTron).

Even if you're not receiving marketing communications on your cell phone (yet!), you can be assured that mobile marketing is here to stay. More than 40 percent of U.S. mobile subscribers say they have been exposed to one or more forms of advertising/marketing on their cell phone in the past 30 days. Not convinced? Ninety percent of Americans over the age of 13 own a mobile phone. There are 66 million smartphone users in the United States. Sixty percent of U.S. marketers are engaged in mobile marketing. Forty-five percent of major U.S. brands are experimenting with mobile campaigns and 40 percent of the 400 billion annual global text messages are commercial. (Source: eMarketer)

Continue to struggle

What does this all mean for us as researchers? As an industry we continue to struggle with decreases in respondent cooperation rates. Quality concerns plague us and although sample suppliers have taken the brunt of the blame, there's no question that survey design and length present major barriers to respondent retention and participation.

In addition, respondents are using smartphones more frequently than ever to access online content. In a recent look at the tens of thousands of respondents that flow through our surveys at Decipher in a given month, close to 30 percent of respondents were attempting to access through a mobile device. As survey-takers become more active on their mobile devices, providing long, involved surveys in a strictly online environment may quickly begin to impact respondent engagement

Thus, research technologies must evolve. Our challenge is to not only keep respondents engaged but to connect with them using relevant communication modes!

Ultimate relationship tool

Mobile devices and social networking sites (society's current word-of-mouth marketing) have the potential of being the ultimate relationship tool: these modes are personal, deliver a one-to-one communication with mass-market efficiencies and are capable of distributing timely messages.

With the explosion of online and mobile media and entertainment options, static online surveys struggle to be effective at engaging respondents. New tools and data collection techniques are evolving to more effectively connect with respondents via interactive surveys, mobile surveys and social networking sites.

Mobile is without a doubt the fastest-growing area of media adoption. Mobile offers us a direct connection (one-to-one!) with respondents and gives us exposure to the growing number of individuals who no longer have a landline. More than 90 percent of mobile devices are now mobile Internet-ready and 60 percent of smartphone users access the Web at least one time a day. Despite the perception that mobile phones can only be used for one- or two-question surveys, marketers today are conducting research via mobile devices for all types of research: event research, ethnography/diary studies, on-site customer satisfaction surveys, screenings and exits – the list grows daily.

While mobile research is still in its infancy, surveys conducted via text-messaging are already scarce, as the industry focus shifts to surveys conducted via WAP or via a survey application designed for a specific phone operating system like an iPhone or Android device.

Both WAP (or Web-based mobile surveys) and app-based surveys have their own benefits and challenges. WAP surveys allow for cross-platform text and multimedia surveys (meaning they're compatible with mobile browsers on multiple operating systems). Device compatibility is over 70 percent. The downside is that mobile browser speed can vary considerably based on the wireless connection. App-based surveys are device-specific (meaning an iPhone app won't work on an Android phone, thus multiple versions of the app are necessary to allow for cross-platform research) but generally bring faster delivery and upload times. This may ultimately work to increase respondent satisfaction with the survey-taking process. In addition, survey apps can be developed on and integrated into preexisting apps, which may present marketers with opportunities to add in survey functionality to apps that have served other functions to date.

Interesting innovations

Although we're lumping iPads in with mobile devices, any tablet PC is really a hybrid of a laptop and a cell phone. Tablet PCs present researchers with interesting innovations in on-site and qualitative research methods. On-site interviewers are actively using tablet PCs to quickly collect (and report on!) data via surveys that may include touch-screen components, interactive questions, video or other multimedia components.

Gone are the days when surveys had to be programmed and loaded on an actual PC. Today tablets can easily access surveys and instantly feed data into online reporting toolsets via a basic wireless connection. Researchers are even using tablet PCs to evolve qualitative research into hybrid quant/qual techniques. For example, respondents are given a short quant survey to quantify individual preferences, after which survey results can be instantly aggregated and summarized via real-time online reporting tools. Afterward, a focus group discussion of preference or other drivers can take place, incorporating the initial quantitative survey data into the qualitative group discussion.

Dangerous tipping point

As with any new research platform,

the cons often outweigh the pros and we're at an almost dangerous tipping point with mobile. Industry acceptance and adoption is at an all-time high while standards and best practices are still in development.

As market research firms race to be first to market with mobile research services and applications, there appears to be a greater focus on technology than on research quality. In a recent posting to a research-related LinkedIn group, a firm eagerly advertised its ability to handle "long and complex surveys" on mobile devices - a practice we've been battling against in online surveys, let alone mobile surveys, as an industry. Respondent engagement on mobile devices is even more challenging than in online surveys which means we need to be highly sensitive to the mobile survey experience.

Being first to market also presents other challenges. Firms like Thumbspeak and Gongos have touted their iPhone survey apps and many more firms are in aggressive development on cross-platform applications that will be supported by iPhones, Droids and BlackBerrys. Although many of these firms have their own panels to support these apps, the question of how many survey apps will one person download looms. What happens when respondents are inundated with survey apps and a multitude of survey options? As an industry we need to be cognizant of respondents threshold for downloading these apps.

Need to be sensitive

Mobile market research presents a challenge to standard online research practices. Studies have shown that in order to get the most out of research efforts on a mobile platform, we need to be sensitive to the unique challenges respondents face when completing surveys on mobile devices.

Small screens; inflexible, device-specific user input methods and potentially slow data transfer speeds all combine to make taking a survey more difficult than on a typical computer. Couple those hindrances with reduced attention spans and a lower frustration threshold and it's clear that we must be proactive in the design of both the questionnaire and user-interface in order to give mobile respondents an excellent survey experience.

Although best practices are still evolving, there are a few that seem to be universally embraced even at this early stage:

Keep the survey short. As in 10 questions or fewer! It takes longer to navigate on mobile devices due limitations of the user interfaces and data transfer speeds.

Minimize the number of pages. Each time the page refreshes, the respondent has to wait. This wait time can range from a short to exceptionally long period of time depending on the network connection (with Wi-Fi at the fast end and regular cell data on a poor connection at the slow end). Take care not to put too many questions on a

page as mobile devices also have less memory to work with, so a page with too many elements may cause the device to become slow or non-responsive.

Keep the question types simple. Single-dimension radio, checkbox or "select" questions are better than multidimension grid questions, which could be difficult to complete due to mobile devices' small screens. Also, limit the use of open-ended questions, as they require typing.

Limit scrolling to a single dimension. Rows are preferable to columns to minimize the need to scroll on both horizontal and vertical axes. Keep answer lists short to minimize scrolling. Consider putting long answer lists into select (drop-down) questions but also be aware that these require more clicks to complete than radio questions. "Select" questions only allow a single response, so for multi-select questions, use the checkbox question-type.

Keep question and answer text short. The small screen and space make it harder to read long options.

Minimize all non-essential content. It takes extra load time and visual space for every element that appears on the screen. Repetitious elements, innocuous for a typical Web-based survey, add an undue burden on respondents completing surveys on the mobile Web, in addition to distracting from the purpose at hand: completing the survey.

Logos - limit logos to the first (and/or last, if absolutely necessary) page of the survey.

Privacy policies, rules pages, etc. - if possible, also limit these to the first/last survey page.

Progress bar - the progress bar can be very helpful for indicating a respondent's position in the survey, however it also increases the load time and the need for vertical scrolling.

Keep the look of the survey simple. Minimize distraction. Javascript support varies radically for mobile devices, so keep interactivity to a minimum. Flash is out for iPhone/iPad/iPod Touch devices. Some mobile devices also have limited color palettes. High-contrast color schemes will work best.

Changing weekly

Mobile capabilities are changing weekly. Firms that have already embraced mobile are moving past WAP or app-based surveys and experimenting with DIY software integration, multi-language surveys, geo-tracking and image-based survey triggers.

Don't be left behind! Even if you're not ready to get into the mobile game, learn about it. Many of the research-related LinkedIn groups, such as Next Gen Market Research and Innovation and New Tools in MR, have members who are posting and discussing mobile technologies almost daily. Industry organizations are including mobile as education tracks in their conferences.

In short, embrace cross-platform best practices and stay curious. If you can't be first in market, be best in market and meet your respondents on the move! | Q

Matt Gershner, PRC on Building Relationships

As an MRA member, I've been able to build relationships through networking events held by my chapter and at national conferences. I pick up insights and knowledge through peer-to-peer collaborations, which have helped me cultivate business in our industry and, of course, grow my client base. For me, seeing old friends and making new ones is vital to the success of our company.

Build Your Relationships
Join MRA at
www.mra-net.org or
call 860-682-1000.

Matt Gershner, PRC
Director of Client Development
Research Now
MRA Member Since 2004

Opportunity calling

What smartphones mean to researchers

By Vivek Bhaskaran

The mobile phone is now far more than a phone. It's our e-mail client, camera, diary, music player and game console. It knows where we are and can tell everyone where we are – sometimes when we don't want or expect it to.

The mobile phone has replaced many devices and seamlessly merged all these functions into a singular device. We are not just talking about the iPhone. Pick up a Windows Phone 7 or an Android phone. They all have full-motion cameras, bright and large high-density screens, GPS chips, Wi-Fi, 3G/4G cellular connectivity and of course thousands of apps to choose from.

A Nielsen report says that one in four households have a smartphone. That number will only continue to rise as smartphones become the new personal computers – with the advantage that we carry them with us all the time.

This is an incredible opportunity for any company that wants to contact consumers. Smartphones have four critical constructs that make them valuable as a research tool: access, location, identity and deployment. Let's examine each of them.

Access

Smartphones require consumers to carry a data plan of some kind. From the carrier's point of view, this represents an additional revenue stream. It also, in today's "always connected" climate, represents permanent tethering of the smartphone user to the Web. The fact that users do not have to pay extra for data allows apps to leverage that access to the cloud with impunity. Unlike SMS, there are no per-byte or per-text message charges that the carriers usually impose. This allows for unlimited communication and innovation in the research process. Because of this always-connected property, the concept of mobile ethnography becomes a reality, where respondents can upload pictures from their smartphones constantly, showing exactly what they are doing at that moment.

In addition, all large mobile platforms allow for push-notification, the ability for the service provider to push data and notify the end user of an event. This allows information to constantly travel back and forth between the smartphone and the network. Thus,

snapshot

As smartphones proliferate, we must seize the opportunities they provide us to research and interact with consumers. The author outlines four critical constructs that make them valuable as a research tool: access, location, identity and deployment.

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for a qualitative/ethnographic study where 20 participants are asked to take a picture of what they are doing every day at a particular time, they can submit photos from anywhere they are, in the soccer field , taking a break at work or at home.

Location

The GPS chip and cell phone location triangulation models that phones provide today are accurate to within 10-15 feet. This, combined with public (or semi-public) application programming interfaces like foursquare or SimpleGeo, makes it feasible to identify a consumer's location, giving research applications contextual location data about a respondent. This type of location feedback has never been possible before and smartphones now have this as a standard feature.

For example, a global chain can use location to collect point-of-sale feedback. Instead of asking users which store they went to, the location data can be used to infer the store ID. It is also potentially feasible to perform intercept studies where the geo-locational data is used to identify potential respondents based on where they have been.

Identity

Knowing the identity of a respondent in online surveys has always been a challenge. The closest researchers have come to reliable identity is a combination of properties culled from a machine in conjunction with the e-mail address. The smartphone all but eliminates this problem. All smartphones have a unique identifier that users cannot change, at least not without a tremendous amount of effort and some significant technical knowledge. All major smartphone platforms provide access to a unique device identifier or UUID. The UUID, although unique to the device, does not relate to the end-user's phone number or other personally-identifiable information like billing address, etc. However apps do have access to the UUID and can use that to identify the device and, by extension, the user. Thus the UUID can be easily used to prevent and track multiple submissions or registrations on studies. Another benefit: Users don't have to identify themselves every time they want to participate or be respondents in a research study, which should increase usability and participation.

Deployment

All four major smartphone platforms - Apple, Android, BlackBerry and Windows Phone 7 - have a integrated app stores. While each one is a little different, the fundamental concept is the same on all of the platforms: Software developers create apps for each of the phone ecosystems and submit them to the respective app store for deployment. Users can then search and download the app and automatically download updates when needed. Since apps can be deployed and updated on-the-fly, instant distribution of surveys to respondents across the globe is possible.

A matter of innovating

The mobile ecosystem provides tremendous advantages for researchers. It's a matter of innovating within this new communication mode to come up with research models and applications that have not been possible before due to either technological or economic constraints. Let's look at a few projects that would have been impossible to complete without mobile research:

Dial-testing the State of the Union address: The project involved polling an audience in real time using a mobile app as users watched the 2011 State of the Union. SurveySwipe, my firm's community-based mobile research platform, partnered with UMass Political Science Professor Stu Shulman to use his text analytics research tool DiscoverText to analyze the data from social networks as well as data provided by participants in real-time.

Mobile ethnographic study of the 2011 Super Bowl 2011: Three days before this year's Super Bowl game, four research firms (Survey Analytics, BrandScan 360, Beacon Research and Hemispheres Research) joined forces to create a large-scale mobile ethnographic study of this major social event. Immediately following the halftime break, the 1,200 iPhone owners in the SurveySwipe consumer mobile panel received a notification with a link to participate in our Super Bowl study and 20 percent accepted. The short survey included both closed- and open-ended questions as well as two questions that asked participants to take and submit pictures.

Inevitable question of sampling

As we think about the smartphone and the mobile ecosystem, the inevitable question of sampling comes up. This is an important issue, especially in public-opinion polling in the political spectrum. This issue alone is the reasoning behind the use of random-digit dialing (RDD) in telephone sampling. Most large public-opinion polling in the United States is still done using some variant of RDD and landline phones. The argument to use landline-telephone based research for public opinion polling goes back to basic sampling theory: "Every member of the population must have an equal probability [chance] of getting selected in a sample." The genesis of RDD-phone sampling is rooted in the idea that all citizens, in general, have access to a landline and that RDD samples can therefore be seen to be a "random sample" of the population. This is an oversimplification of course, but is the core idea behind RDD.

That being said, recent Centers for Disease Control/Pew reports pointed out the obvious: Nearly 25 percent of U.S. households do not have landlines and even in households that have landlines, over 15 percent of them use the wireless phone as their primary phone. This introduces a significant sampling bias – one that needs to be addressed.

What this means is that, in effect, there is no single medium (landline, mobile phone, Internet or smartphone) that truly covers the entire population. This poses an interesting challenge in doing multimodal surveys to account for the entire population. A mobile research model can fill in the gap of the group of users who use cell phones as their primary phones.

The obvious argument for mobile research is the coverage and penetration of smartphones within the general population. ComScore reported that 65.8 million people in the U.S. owned smartphones during the three months ending in January 2011, up 8 percent from the preceding three-month period. By 2013 the current prediction is that smartphone usage in the U.S. will be at 80 percent of the mobile population.

Another wave

Smartphones represent another wave of personalization of computing. The first came with the desktop computer, followed by the more portable laptop and now the smartphone. As these powerful machines increase their influence on our lives, they are rapidly becoming the primary communication device for social media, messaging, etc. Sometimes they are even used to make phone calls! Their ubiquity has made them a new and critical vehicle for contacting respondents for research purposes. With the unique access and information-gathering opportunities they provide us, we as researchers must get smart and fully embrace their use. | Q

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or not at all concerned.

The availability and affordability of energy is the only issue about which Americans have grown significantly more worried since 2010, from 38 percent to 46 percent. The current level of concern about this is similar to what it was from 2006 to 2008.

The economy and unemployment are top-ranking concerns for Republicans, Independents and Democrats. Additionally, majorities of Republicans and Democrats are highly worried about Social Security. Beyond these areas of common concern, however, the parties diverge. Large majorities of Republicans say they worry a great deal about federal spending (79 percent) and the size and power of government (62 percent) and 55 percent worry a great deal about immigration. All of these issues are absent from Democrats' top concerns. In contrast, Democrats' top-ranking issue - health care - is not a great concern to most Republicans.

Among the four issues of concern to a majority of Independents, the economy and unemployment are issues they have in common with both major parties, while federal spending is primarily a Republican concern and health care, a Democratic one.

Also of note, women are significantly more likely than men to be worried about health care, hunger/homelessness, Social Security, crime, unemployment, the environment and drug use.

Young adults ages 18-to-34 are significantly less likely than older Americans to be concerned about Social Security and the size and power of the federal government. Young adults are significantly more likely to be concerned about the quality of the environment. For more information visit www.gallup.com.

No pleasure cruise: Gas prices driving consumers off the roads

As the national average for a gallon of gas edges over $4 per gallon consumers have cut back on their driving. Gallons of gas purchased are down 1.2 percent from a year ago, indicating that consumers are driving less, according to data from Port Washington, N.Y., research company The NPD Group. An NPD survey from January 2011 to gauge what price level would be required to cause consumers to drive less suggests that at today's gas prices approximately 60 percent of consumers are cutting back on driving.

"If the current uptick in gas price is sustained, we can expect consumers to begin implementing some key changes like reducing or consolidating shopping trips, taking more mass transit and carpooling," says David Portalatin, industry analyst, automotive aftermarket, at NPD. "In the case of a prolonged spike above $4, we'd expect even more significant changes like working from home, relocating or changing jobs or driving a more fuel-efficient vehicle."

Based on recent history in 2008 when gas reached a high of $4.16 per gallon, research shows that drivers made significant changes in driving behavior including 49 percent who reduced or consolidated shopping trips, 29 percent cancelled or modified vacations and 25 percent found alternate means of transportation including mass transit, carpooling and riding a bike. For more information visit www.npd.com.

Losing customers? Look at what's happening on the ground

Companies spend billions each year on advertising but recent research indicates that ad dollars may be better used to improve customers' personal experience. Only 4 percent of Americans trust advertising the most as an information source when choosing products or services and factors that have an immediate impact on the customer's personal experience with a company were the primary reasons consumers gave for defecting, according to a survey from San Mateo, Calif., research company Satmetrix. Bad customer experience forced 22 percent of consumers to stop doing business with a provider during the second half of 2010.

Interacting with a rude or disinterested employee was cited most frequently (34 percent) as a reason for switching brands, while 20 percent said they switched because of unexpected charges or fees and the same number listed poor product or service quality as the main reason. Factors with a less-immediate impact caused fewer defections, such as having an unfavorable return or refund policy (3 percent of consumers).

The data also revealed that consumers most trust recommendations from independent sources (83 percent), especially those with whom they have personal relationships. Half of consumers (50 percent) cited personal recommendations from friends, family or colleagues as the most trustworthy source of information. Approximately four times as many people trusted product test reviews (18 percent) or consumer opinions posted online (15 percent) as compared to advertising. Additionally, 49 percent of all consumers referred friends or colleagues to a company they had a positive experience with in the past 12 months, while 10 percent advised against doing business with a company. For more information visit www.satmetrix.com.

Affluent consumers welcome discounts on prestige brands

Discounts by prestige brands during the past two or three years of a weak economy have apparently been accepted by affluent and luxury consumers without diluting the stature of the brands. About 60 percent of the affluent say the discounts did not affect their opinion of the brands, while a quarter said the discounts motivated them to make purchases they may not have otherwise made, according to the American Affluence Research Center, Alpharetta, Ga. Only 5 percent said the discounts lowered the image/prestige of the brand.

This data suggests that the affluent recognize there are certain situations where discounting by prestige brands is reasonable and understandable, if not part of an ongoing practice. About half said discounts seemed to be a reasonable way to maintain sales during the past few years.

Less than 20 percent said the discounts raised potentially negative issues. These were questions about whether quality had been lowered to offset the discounts and whether prior prices and profit margins were fair. Similar responses were elicited when asked about discounts that prestige brands communicate via the Internet or mobile devices only to past customers or to members of special flash sale sites. For more information visit www.affluenceresearch.org.

Consumers are foggy about the cloud

While nearly half of consumers are aware of the cloud, only 9 percent acknowledge that they fully understand it, according to data from GfK Business and Technology, a division of GfK Custom Research North America, New York. A lack of understanding has also raised concerns among the befuddled masses, with data security topping the list of worries.

The term cloud computing is used to describe applications and services hosted and run on servers connected to the Internet that end users do not have to maintain or support. Consumers are increasingly in need of cloud-based services with data spread across multiple devices, including laptops, cell phones and tablet computers.

Interest in storing data within the cloud is significantly higher in younger consumers, with approximately 60 percent of users ages 18-to-35 interested in moving their data to the cloud. In older age groups, that number drops significantly, with only an average of 25 percent of users over the age of 50 interested in moving their data to the cloud.

There are also concerns among consumers about moving their data to the cloud. Nearly two-thirds of consumers said that they are concerned about the security of their content if they were to store it in the cloud. Additionally, 47 percent of consumers surveyed said they would never use the cloud unless they have a simple and easy way to store their content, while 39 percent are concerned about the ability to play content on different devices from the cloud. For more information visit www.gfkamerica.com.

Ladies look to financial advisors for guidance

Women are becoming a force to be reckoned with in the financial world. The number of women who say they have a self-directed investment account is not significantly different from the number of men who say the same (30 percent of women and 36 percent of men) yet women are much more likely than men to look to a trusted advisor to give them investment ideas, according to Chicago research company Mintel.

Thirty-nine percent of female investors' primary source of investment ideas are their investment advisors, compared to only 27 percent of males. Women are also slightly more likely to solicit ideas from friends and family members (29 percent of females vs. 22 percent of males).

Men, on the other hand, are most likely to look to financial Web sites and blogs (38 percent) or the investment company's Web site (31 percent). They are also much more likely than women to look to newspapers or magazines for inspiration. For instance, 27 percent of males like to read financial newspapers such as *The Wall Street Journal* (either print or online), while only 17 percent of females claim the same. For more information visit www.mintel.com.

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consumers regarding the economy, personal finance, retail behaviors and motivators, future purchase plans, media consumption for domestic and world markets and insights on the China market. BIGinsight.com pulls data from consumer data sources including BIGresearch Consumer Intentions & Actions; Simultaneous Media Usage Surveys; the Federal Reserve Economic Database; and others. For more information visit www.biginsight.com.

20|20 launches QuickQual Turbo; releases e-book on online qual

20|20 Technology, a division of 20|20 Research Inc., Nashville, Tenn., has debuted QuickQual Turbo, a bundled solution designed to deliver fast-turnaround, in-depth qualitative research. Built around 20|20's QualBoard bulletin board focus group platform, QuickQual Turbo includes up-front planning; screener writing; help developing the discussion guide; all recruiting and incentives; participant management; assistance with probing and the delivery of a complete; and customized reporting package at the close of the project. The solution uses the company's processes and technology and a dedicated Qualitative Assistant to deliver seven-day-or-less turnaround on consumer studies in the U.S.

Separately, 20|20 Technology has released its first e-book about online qualitative research, titled *How to Save Time and Money on Your Qualitative Research Projects: Using Online Research Software for 5 Popular Methodologies*. The five articles in the e-book detail how researchers are taking traditional qualitative research projects online. The e-book is available as a free download from the 20|20 Web site. For more information visit www.2020research.com.

ComScore completes European launch of its audience measurement tool

Reston, Va., research company comScore Inc. has completed the European launch of comScore AdEffx Campaign Essentials, an audience measurement tool with an online dashboard that features daily measurement of campaign demographics and the availability of traditional post-buy metrics. ComScore AdEffx Campaign Essentials was originally introduced in the U.S. in 2009 and has been beta-tested with a select group of clients in Europe over the past several months and is now available to the entire European market.

Additional product features include its ability to demonstrate the actual audience composition reached for specific media buys; to optimize publishers, placements and creatives based on performance; to compare the performance of online and offline media plans by using the same post-buy measures that are used in TV, such as reach, frequency and GRPs; to create custom segmentation to allow reporting for specific audience target groups; and to use the interactive online interface for daily in-flight campaign optimization. For more information visit www.comscore.com.

Briefly

Dooblo Ltd., an Israel research company, has released the Android version of its SurveyToGo survey software solution for Android phones and tablets and features branching and logic; GPS location tracking of surveyors; multi-language surveys and data-capture support. SurveyToGo is provided on a pay-per-use basis with no software or IT costs. For more information visit www.dooblo.net.

Vibetrak, a Des Moines, Iowa, research company, has released a case study demonstrating the use of its Vibetrak National Advertising Omnibus, an online national omnibus survey for video testing. The study uses commercials from the 2011 Super Bowl to analyze ad likeability and ad performance. For more information visit www.vibetrak.com.

Nebu, a Netherlands research software company, has relaunched its client-exclusive online community area. Dub Community aims to enable Nebu users to access resources and information for all Nebu software. For more information visit www.nebu.com.

London research company E-Tabs has released Verify, an automated tabulations checker. The software solution is designed to allow users to check frequencies, percentages, hole counts, bases, means, standard deviations and other stats, nets and banners by applying the out-of-the-box checks included with the standard version of Verify or by creating more complex checks with Verify Designer. For more information visit www.e-tabs.com/verify.

Johnson City, Tenn., research company SmartyPants has redesigned its Web site www.asksmartypants.com.

Columbus, Ohio, research company iPinion LLC has announced the beta release of the mobile Web app version of its iPinion native smartphone survey application. IPinion will be available as a Web app that runs on smartphones as well as desktop browsers without the need to download an app. The mobile Web platform is ideally suited for random sampling and panels. For more information visit www.ipinion.us.

Dallas research company Parks Associates has redesigned its Web site (www.parksassociates.com) and its hosted events.

San Francisco research company MarketTools Inc. has added adaptive role-based reporting to its MarketTools CustomerSat enterprise feedback management solution. The addition is designed to deliver a customized, interactive view of customer feedback data, tailored to an employee's specific role. For more information visit www.markettools.com.

London research company BrainJuicer Group PLC has launched a new Web site on its www.brainjuicer.com domain. The site was developed by London digital marketing agency Fuse.

Palo Alto, Calif., research software company SurveyMonkey has partnered with ePrize, a Detroit digital marketing agency, to offer incentive options for survey creators. Adding an incentive is available to all U.S. free or paid SurveyMonkey customers. For $15 per incentive, users can offer sweepstakes (custom prizes or gift cards valued from $25-$500); an instant-win game (a weekly offering for one respondent to win a $100 gift card); or a customizable coupon. For more information visit www.surveymonkey.com.

Fort Washington, Pa., research company ListenLogic has debuted its Social Listening Intelligence Centers, which use ListenLogic's Integrated Social Intelligence Platform to help organizations manage their reputation and drive social outreach. The Centers are a fully-managed social media listening and intelligence solution intended to identify, analyze and escalate critical issues to stakeholders using ListenLogic's data-mining technology and analysis. For more information visit www.listenlogic.com/slic.

Berkshire, U.K., research company mobileSQUARED has introduced Mobile Consumer Trends, a study of mobile consumer data over a two-year forecast period, including behavior and usage trends toward the mobile Internet, mobile apps, mobile advertising and mobile commerce. For more information visit www.mobilesquared.co.uk.

San Francisco research company BuzzLogic has upgraded BuzzPlanner, the media planner and buying component of its online advertising platform. Updates include the ability to input specific brand goals which generate hundreds of URLs that can be targeted with ads; optimize the placements according to conversation change metrics; and scale the media plan to maximize return. For more information visit www.buzzlogic.com.

KN Dimestore, a New York division of Menlo Park, Calif., research company Knowledge Networks, has begun optimizing digital campaign creative in real time using brand key performance indicators as the leading performance indicator. For more information visit www.knowledgenetworks.com/dimestore.

Dallas research company Toluna has launched its iPhone app, designed to allow Toluna panel members to create polls in seconds and receive responses direct to their iPhone. The app is free and can be downloaded at the App Store. For more information visit www.toluna.com.

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InsightsNow has partnered with **Rubinson Partners Inc.**, a New York research consultancy, to create innovation methods for the consumer packaged goods industry.

GfK Custom Research North America, New York, has formed an alliance with Mountain View, Calif., research company **NetBase** use NetBase's platform, social intelligence warehouse, analytic tools and scorecards.

Research companies **Quick Test/Heakin**, Jupiter, Fla., and **ActiveGroup Ventures Inc.**, Atlanta, have formed a strategic partnership to offer ActiveGroup's services to Quick Test/Heakin clients under one contract.

Awards/rankings

Short Hills, N.J., open ratings company **Dun & Bradstreet** has certified **QSA Integrated Research Solutions**, Alexandria, Va., as a top-quintile performer for demonstrating outstanding overall customer satisfaction relative to similar companies.

Adelphi Research by Design, Doylestown, Pa., has been named 2010 Global Supplier of the Year by **Eli Lilly and Company**, Indianapolis. The award is presented to recognize exceptional efforts.

The Qualitative Research Consultants Association (QRCA), St. Paul, Minn., presented Seattle advertising agency **Cole & Weber United's** Project See-Store: Getting Behind the Counter project as the winner of the Qually Award for excellence in qualitative research. The award was presented at the QRCA Symposium on Excellence in Qualitative Research in May in Chicago.

Cologne, Germany, research company **Globalpark** awarded London research companies **Ipsos MORI** and **Lumi Mobile** the Mobile Research Conference award for their project, titled "Appcast: Live mobile engagement & insights – I'm having fun, can this really be research?"

The Advertising Research Foundation (ARF), New York, presented the ARF Great Mind Awards at the ARF Re:think 2011 Convention in March. New York research company **Ipsos ASI's** Next*Connect development team received the 2011 ARF Great Mind Quality in Research Award. Additionally, Ipsos ASI researchers **Dave Walker** and **Jim Leonick** were presented with Great Mind certificates. Leonick also received a Rising Star Award certificate and Walker was presented with an Innovation Award certificate. Additionally, Encino, Calif., research company uSamp's **Chuck Miller** and **Melanie Courtright** were named winners of the ARF Innovation Award certificate.

Separately, Bellevue, Wash., research company **Global Market Insite Inc.** (GMI) and Chicago research company **Mintel** were presented with the award for Quality in Research by the ARF. GMI's GMI Pinnacle and **GMI Interactive** solutions were each awarded a Certificate of Distinction.

Kim Harrison, president and CEO of **Focus Forward LLC**, a Fort Washington, Pa., research company, has been named to the *Philadelphia Business Journal*'s 2011 40 Under 40, which recognizes individuals under the age of 40 for professional accomplishments and community involvement.

New accounts/projects

Portland, Ore., research company **Rentrak Corporation's** TV Essentials reporting system has been selected by **MPG**, the U.S. division of Havas Media, Surenes, France.

Separately, **National Geographic Channel**, Washington, D.C., has expanded its contract Rentrak to provide TV Essentials for Nat Geo WILD and Nat Geo Mundo.

London research agency **Opinion Leader** has been chosen to manage Newark, N.J., financial service company **Prudential's** Brand Tracking Survey.

Market Publishers Ltd., London, has signed agreements with **AFS Research**, Uzbekistan, and the **Assessment Group**, Birmingham, Ala., authorizing MarketPublishers.com to distribute and sell the companies' research reports.

Austin, Texas, research company **Kinesis Survey Technologies** has been chosen by London research company **Mobilocity** to build and manage a U.K. consumer panel for real-time feedback via mobile devices.

Nuremberg, Germany, research company **The GfK Group** has been awarded a TV research contract to establish a TV panel in Portugal.

Additionally, **GfK Ukraine** has extended its contract with the **Television Industry Committee** and in Belgium, **GfK Audimetrie** has been chosen to measure radio audiences.

Bosch Power Tools, Prospect, Ill., has adopted Social Insight Connect from Cologne, Germany, research company **Globalpark** to add a private community to Bosch's Facebook page focused on professional-grade power tools.

New companies/new divisions/relocations/expansions

New York research company **Converseon** has launched Converseon Nordics in Copenhagen, Denmark, to expand its offerings in Denmark, Sweden, Norway, Finland and Iceland.

Horsham, Pa., research company **TNS** has opened an office in Miami.

U.K. research company

DCActiv has launched a new division in Dubai, United Arab Emirates.

Symphony Technology Group, Palo Alto, Calif., has launched Symphony Advanced Media to provide crossmedia advertising performance analytics and consumer insights. The company is online at www.symphonyam.com.

Research companies **Infogroup**, Omaha, Neb., and **ORC International**, Princeton, N.J., have launched an FDA and regulatory practice, led by Morris S. Whitcup, chief research officer. The practice will be part of ORC International's health care and pharmaceutical research division.

Majestic MRSS, a Mumbai, India, research company, has expanded its presence in Greater China with offices in Taiwan, Beijing, Guangzhou and Hong Kong, in addition to its existing office in Shanghai.

Psyma International Inc., a King of Prussia, Pa., research company, has restructured to prepare for a change in leadership by the end of 2011.

Austin, Texas, patient management platform **MyMedLeads.com** has launched MysteryShopperMD, a mystery shopping service.

Research company earnings/ financial news

Nunwood, Leeds, U.K., reported an 18 percent rise in sales in first-quarter 2011, including a 116 percent increase in Nunwood's North American operation.

BrainJuicer Group PLC, London, announced financial results for the 12 months ended December 31, 2010. Highlights include 38 percent revenue growth to £16.4 million; 35 percent growth in operating profit to £2.2 million; and 26 percent growth in fully-diluted earnings per share to 11.3 pence.

The GfK Group, Nuremberg, Germany, reported record revenues for 2010, including a 14.3 percent margin and a sales increase of 11.1 percent.

Synovate, Chicago, announced financial earnings for 2010. Operating profit at constant currencies increased 19.4 percent to £45.6 million and net revenue increased 9 percent to £350.7 million.

Arbitron Inc., Columbia, Md., announced results for the first quarter ended March 31, 2011. Net income increased 18.2 percent to $16.2 million. Revenue was $100.9 million, an increase of 5.2 percent. Operating income increased 15.5 percent, to $29.1 million.

IPerceptions, Montreal, reported financial results for the fourth quarter and fiscal year ended December 31, 2010 (amounts in Canadian dollars). Fourth-quarter revenue rose 7 percent over the prior-year period. For the 2010 fiscal year, revenue was $5.1 million, an increase of 5 percent over 2009. Net loss and comprehensive loss for the 2010 fiscal year was $2.1 million, compared to $3.3 million in 2009.

MarketShare, Los Angeles, announced a $32 million follow-on investment by Elevation Partners, New York.

Vision Critical, Vancouver, B.C., CEO Angus Reid made a $125,000 contribution to the R. James Travers Foreign Corresponding Fellowship at Carleton University, Ottawa, Ontario. The fund has been established to make an annual award of $25,000 to cover travel, reporting and research expenses and a stipend for a journalist. It will be administered by Carleton University through its School of Journalism and Communication in the Faculty of Public Affairs. The award reflects the importance that Jim Travers attached to his six years reporting from Africa and the Middle East.

Names of Note

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Research Group, New York.

Phoenix Marketing International, a Rhinebeck, N.Y., research company, has named **Maxine Harrington** research executive. She will be based in Surrey, U.K.

Oslo, Norway, research software company *Confirmit* has hired **Michael Wooh** as CMO.

Horsham, Pa., research company *TNS* has hired **Ivan Browne** as head of its retail and shopper sector. Browne will be based in London. Additionally, TNS has hired **Gustavo Alvarez** as regional accounts director for its Miami office.

New York research company *Millward Brown* has named **Daren Poole** global brand director for Link, its ad optimization solution. He will be based in Sydney, Australia.

Clear Channel Radio, San Antonio, has appointed **Gary Marince** as senior vice president, research and development.

David Teague has been named a director in the U.K. for *The Futures Company*, a Chapel Hill, N.C., research firm.

London research company *Populus Limited* has appointed **Jo Gibbons** as director, business development; and **Alexia Latham** as associate director.

Espoo, Finland, research company *Zokem* has hired **Andreas Piani** as general manager, Europe.

Portland, Ore., research company *Rentrak* has promoted **Ron Giambra** to president, theatrical worldwide. Additionally, **Cathy Hetzel**, president of Rentrak's advanced media and information division, has taken on the role of corporate president.

New York research company *Ipsos Health* has made the following hires: **Pauline Minch**, **Amy Moses** and **Sandra Weber**, senior research manager; **Elisabeth Higgins**, **Jessica Stuart**, **Pooja Dagli, Ravi Makhiha**, **Qasim Jawaid** and **Asfia Azam,** research associate.

calendar of events

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.

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.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile World," on **July 19-20** at Coles College of Business, Kennesaw State University in Atlanta. For more information visit http://www.merlien.org/upcoming-events/mobileresearch.html.

RFL Communications will hold a conference, themed "ROI on MR" on **July 27-28** in Chicago. For more information visit www.rflonline.com.

The Australian Market and Social Research Society will hold its annual national conference, themed "Curiouser & Curiouser," on **September 8-9** at the Hilton Hotel Sydney. For more information visit www.mrsa.com.au.

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.

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.

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.

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.

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.

The Pharmaceutical Marketing Research Group 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.pmrg.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.

The Life Insurance and Market Research Association will hold its annual conference on **October 23-25** at the Hilton New York. For more information visit www.limra.com.

IIR will hold its Future Trends conference on **November 7-9** at the Eden Roc Hotel in Miami Beach, Fla. For more information visit www.iirusa.com/futuretrends/venue.xml.

IIR will hold its annual conference, "The Market Research Event 2011," on **November 7-9** at The Peabody Orlando in Orlando, Fla. Register with the code QUIRKSNEWS to save 20 percent. For more information visit www.iirusa.com/research/event-home.xml.

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

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trade talk

By Joseph Rydholm
Quirk's editor

A handful of tech-driven market research nuggets

Though it fell during the press-time crunch for this issue, I couldn't resist the lure of spending a few days in Chicago in early May for the IIR's Technology Driven Market Research Event. Apparently many others were similarly drawn, as organizers said that the event had to be moved to a larger venue after attendance figures passed 200.

As with any conference, there were highs and lows. A few of the presentations had that Trojan Horse feel, where what were ostensibly case studies with vendor and client participation were instead largely sales presentations (tastefully delivered though they were). And some speakers went off course or lost track of time and had to rush through their slide decks.

But in the main, the conference served as a worthwhile and necessary incubator of ideas and discussions on the ways that technology is impacting our industry.

Following is a quick rundown of some of the takeaways I scribbled down in my notes.

Technology helped compensate

Nestlé's Olga Patel spoke at length about the company's successful use of eye-tracking, commenting that the technology helped compensate for consumers' inability to always know precisely what captures their attention or what motivates them. Not that consumers willfully dissemble - they just don't have the power to recall their second-by-second reactions. And thus, being able to track their gaze path helps Nestlé understand what parts of an ad or package caught their eye. She cited one example where eye-tracking showed that moving a model's gaze from the viewer to the packaging worked better at directing attention to the product in an ad.

Adding a qualitative element by interviewing consumers following an eye-tracking session has also helped add some depth and color to the findings as this gives consumers a way to talk about why they did what they did, Patel said.

One of her best pieces of advice to her fellow researchers was to be open to using many methods for a project and to tailor your methodology choices to each project's needs, rather than being tied to one approach.

An audience member asked her if Nestlé had researched if/how kids learn shopping behaviors from their parents and she said that that topic is something the company is currently looking at. She did pass along that Nestlé has found that when parents say things like "I'm looking for healthy ingredients" when in the grocery aisles, kids tend to play that language back when they're describing shopping. Though, not unexpectedly, kids' perceptions of what connotes healthfulness (if a frozen treat is red like an apple it must be healthy) won't always jibe with those of their parents.

Get instant feedback

Vivek Bhaskaran of Survey Analytics and Kevin Keeker of Zynga co-presented on Zynga's use of research within its many game products. One of the most interesting topics they touched on was that, in lieu of cash or points, Zynga game players who complete short in-game research requests often get instant feedback on how they compare to other respondents - which has not only been well-received by the players but has also saved Zynga money by freeing it from having to always pay some sort of incentive. It begs the question, what else can marketing researchers give to respondents in terms of instant feedback or instant rewards that might not only better engage them and improve their view of the research process but also be more cost-effective for research vendor and client?

Mobile app was critical

Chris Hobson of txteagle moderated a panel of researchers who have conducted app-based mobile research. CareerBuilder's Sanja Licina said the ability to use a mobile app for research was critical, given the on-the-go nature of the job seekers who use CareerBuilder. She said she likes to be able to put surveys in front of users at a place and time that is convenient for them.

Panelist Lisa Kim of Samsung Electronics said that mobile research has been a helpful complement to the company's ethnographic-based new product research. In looking to develop products that are one to three years out, Samsung conducts in-home interviews that focus on one type of product, such as laptops. Having respondents perform tasks using a mobile app has worked well as a screening tool, she said, and has also informed the ethnographies by bringing the researchers up to speed on issues relevant to the consumer. It has also made the in-home visits much more focused and effective, as the mobile research essentially takes the place of about 20 minutes of in-depth interviewing and allows that time to be used for other purposes.

Tune out the hype

I was heartened by the fact that once again, as evidenced by the various usage examples I heard in Chicago, researchers seem innately able to tune out the hype surrounding these technologies and see them for what they are: valuable additions to their array of research tools. Apps and other new toys are not replacements for existing research methods but rather ingenious and effective vehicles for adding depth, nuance and new angles to data gathered from other sources.

Further, as our culture becomes more and more mobile and more and more comfortable (perhaps obsessed?) with the social and sharing aspects of technology, it's imperative that we use that same technology to evolve the research process to give respondents a convenient and engaging survey experience. | Q

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Coming in the July issue...

P&G takes on data quality
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Read the results of our latest research industry salary survey to see how you compare.

Health care research
How to use primary market research to mitigate the risk of a potential negative regulatory affairs response to a new health care product.

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online and offline

News about Quirk's and quirks.com

Quirk's app for Android

Earlier this year we launched an interactive digital edition of Quirk's as an iPad and iPhone app. This month, we are debuting the research industry's first media app for the Android operating system. The free app includes fully-interactive editions of our most recent issues with new issues automatically pushed to the app. Features include interactive page flipping, zooming, bookmarking, searching and sharing your favorite articles. The app also accepts Flash and video enhancements. Download Quirk's Magazine from the Android Market for free!

Third-annual research salary survey results coming soon!

In our July 2011 issue we will release the full results of our third-annual marketing research salary survey. The results are based on responses from 2,000 researchers on both the client and provider side. Judging by feedback we've already received, it looks like everyone deserves a raise!

Quirk's RFP system makes vendor selection a breeze

Quirk's online directory search has made it easy to get price quotes from multiple research companies in a few simple steps. Best of all, our request for proposal (RFP) system is completely free of charge. When perusing a Quirk's directory, check the boxes of up to 20 companies you're interested in to see more details. Then, choose the firms you want to receive your proposal request by checking the RFP box at the bottom of each listing. Finally, complete and submit the RFP form. The details you include in your RFP will automatically be sent via e-mail to the firms you selected. Suppliers will respond directly to you. It's that simple!

cover-to-cover

Facts, figures and insights from this month's issue

> Mobile video devices such as handheld cameras, Flip cams and mobile phones allow you to be that fly on the wall. They allow spontaneity to trump contrivance, depth to replace brevity, speed to eclipse delay and non-verbal communication to triumph over words on paper. *(page 20)*

> Retailers cannot lay claim to any one shopper, as consumers do not classify themselves by the stores at which they shop. They choose stores based on what makes the most sense for them at any given time. *(page 30)*

> The objectives of shopper versus consumer research remain somewhat out of sync. While consumer research encompasses the more traditional market research disciplines, including brand research, SI seeks to understand why these brands are appealing or not appealing to the shoppers and why sales do or do not result. *(page 35)*

> As with any new research platform, the cons often outweigh the pros and we're at an almost dangerous tipping point with mobile. *(page 55)*

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Congratulations to April's winner, Jeffrey C. Adler of Centrac DC Marketing Research, Washington, D.C. April's prize was a free day of research from FocusVision.