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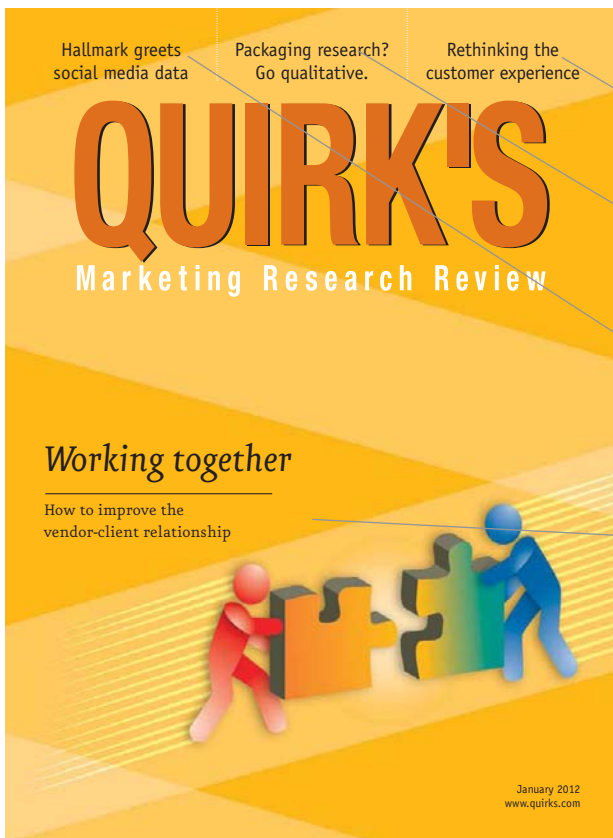
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●●● ad research

The dos and don'ts of designing mobile creative

Mobile display advertising broadly outperforms online display advertising in traditional brand metrics – especially ad awareness – but as the novelty of this new medium wears off, creative quality matters more than ever, according to Dynamic Logic, a New York research company. Poor creative can even have a negative impact on a brand, compared to the past three years when mobile display advertising was just getting started and content was less significant.

According to Dynamic Logic, three important factors that drive a successful mobile campaign are the location of a brand name or logo within a mobile ad (left-side brand placement is generally most effective and has a strong impact on advertising recall); clear and persistent branding; and a strong call-to-action that encourages interactivity and engagement.

Conversely, the three biggest mistakes mobile advertisers make are repurposing online creative by cropping it for a mobile environment; showing the brand only through a product shot; and cluttering ads with too much text and too many logos.

The average mobile campaign significantly outpaces online campaigns in brand metrics for a multitude of reasons. While mobile advertising effectiveness is still driven by novelty, it also benefits from the larger proportion of the mobile screen devoted to the advertisement compared to online. In addition, the copy and content are typically more focused due to size and technology constraints. Finally, as consumers become more acceptant of mobile ads, the medium offers better targeting than most media.

Mobile works well at communicating messages for high-involvement categories like financial services. However, some of the best campaigns are found in low-involvement categories like consumer packaged goods, where ads are more effective in moving persuasion metrics, such as favorability and purchase intent.



●●● consumer psychology Age-progressed images spur retirement saving

For many Americans, retirement feels so far off that they can't imagine a future version of themselves retiring. Thus, they save less than they will really need. Presenting consumers with an actual, retirement-age face helps convince them to save more, according to "Increasing Saving Behavior Through Age-Progressed Renderings of the Future Self," an article published in the November 2011 edition of the *Journal of Marketing Research*.

In a series of experiments, researchers Hal E. Hershfield, Daniel G. Goldstein, William F. Sharpe, Jesse Fox, Leo Yeykelis, Laura L. Carstensen and Jeremy N. Bailenson created age-progressed images of the research participants to show them what they will likely look like when they reach retirement age. Then they were asked to participate in investment scenarios.

When faced with an image of their actual future selves, working-age adults were willing to allocate approximately 33 percent more of their paychecks to their retirement accounts than participants who did not view an age-progressed image of themselves. In another online virtual reality experiment, participants who saw their age-progressed photo were willing to put away about twice as much in a long-term savings account than those who did not.

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Hallmark sends greetings from Social Media Land

If you imagine the various facets of marketing research being plotted on a map, the area featuring social media data would probably be represented as an overgrown swamp, filled with pockets of quicksand, or as an impenetrable thicket of thorny shrubs.

The path into, and way out of, this region is unclear. Nor is it really plain why you would want to venture in in the first place. There's seemingly no rainbow with a pot of gold at the end of it waiting for you. And if the prize is some sort of enlightenment, it feels like there's a good chance you'd finally reach the yogi after your arduous journey, only to have him spout a maddening koan and return to his meditation.

Ever on the lookout for some form guidance through the social media data landscape, I found one beacon of hope at this past fall's Market Research Event in Orlando, Fla., in the person of Tom Brailsford, consumer understanding and insight manager with Hallmark. He gave a talk – aptly titled “Social Media Data and Market Research: How to Get There From Here” – that was a refreshing, honest look at his group's attempt to make sense of social media data.

Many of his comments – and a host of other equally worthwhile and compelling observations – are echoed in a paper he referenced during the talk which he co-authored with Josh Gunkel

and Ben Smithee called “Utilizing Social Media to Understand People.” It's available from slideshare.net or at <http://tinyurl.com/74g2hmc>.

Drawing from numerous existing sources and their own experience, they sketch out a framework for how to think about social media data analysis, addressing topics such as the elements and types of social media data and the differences between listening with social media and using it to engage your customers. The paper also features a great appendix of free social media analysis sources and tools.

The stage we're at

I came away with more questions than answers from both his presentation and the paper but that's no fault of Brailsford and/or his co-authors. Rather, it's a reflection of the stage we're at with this social media data thing. And while tossing out more questions may seem to be adding to the confusion, their work has actually helped frame and give shape to some critical issues.

For example, looking beyond the data itself and what you do with it for research purposes, the rise of social media data brings with it a whole host of issues for organizations to wrestle with internally.

Data transparency. The data is open to everybody – including your competitors. As your shrink might say, how does that make you feel?

Data ownership. Whereas sales data is owned by the retail department, focus group data by the research team and data on e-mail open rates by the marketing group, who lays claim to the social media data? Who gets to control it and



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Joe Rydholm can be reached at je@quirks.com

what gets done with it?

Blurred boundaries. If you, as a marketing researcher, comment on a consumer-facing blog or respond to a tweet, you enter the realm of public affairs or marketing. Who issues the guidelines for what you say and how you say it?

Beyond these types of potentially large questions about internal practices, the authors make an important point: When it comes to engagement, consumers often don't distinguish between who they're interacting with when they talk to someone from a brand or company via social media. Thus, with everybody speaking on behalf of the brand, training may be required for those whose original job description didn't include (or foresee the need for) directly engaging with consumers.

Your new best friend

If your company's told you to make social media data your new best friend in 2012, download the paper. You'll get a clearer idea of where your organization and its customers fit in this milieu and, while I can't guarantee it will lead you to the promised land, you'll certainly be better able to venture off the beaten path and blaze your own trail.



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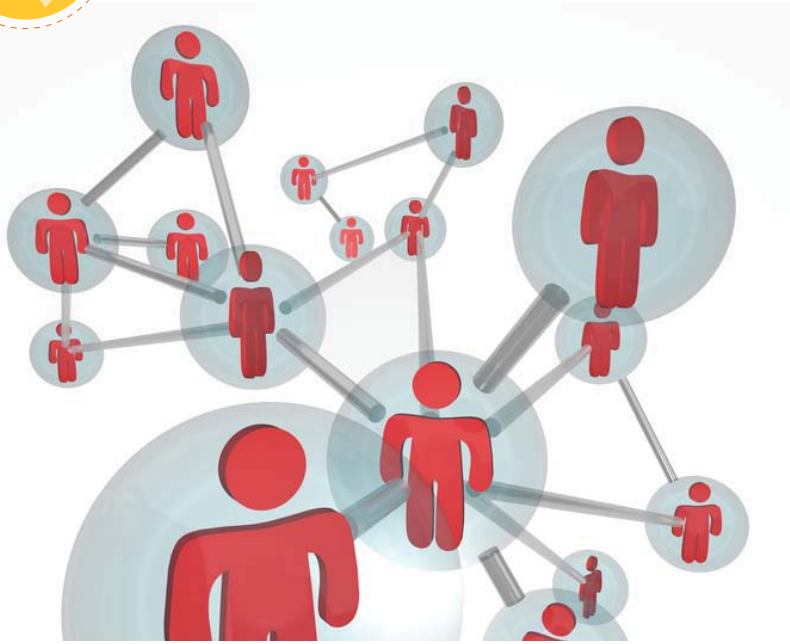
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... social networks

'Community' service in the digital age

Many companies missing out on offering customer support via Facebook

Despite the growing presence of social media for customer conversations, few organizations mine the social media channel to improve customer satisfaction. According to data from San Francisco research company MarketTools Inc., although 34 percent of the executives surveyed stated that they were aware of customers using social media to comment on or complain about their company and its products, less than one-fourth of these executives said that their companies "always" respond to these customers.

Twenty-three percent of companies provide customer service and support on Facebook, with 12 percent providing customer service and support via Twitter.

"Companies are increasingly embracing social media as a way to in-

teract with their customers, though they are missing an opportunity to incorporate this feedback into a voice of the customer program," says Karin Adams, director, enterprise products, at MarketTools.

The study also revealed that 33 percent of executives said that their companies have a greater focus on using social media as a channel to capture customer feedback when compared to last year. When asked what areas of the company are active in social media, 44 percent of those surveyed cited public relations; 42 percent cited corporate marketing; and product marketing and customer service/support were each cited by 34 percent of the respondents.

Of the 68 percent of companies that have an active presence in social media, 48 percent have an active presence

on Facebook; 24 percent on Twitter; and 17 percent on their own company blog. Twenty-two percent stated that their company's CEO regularly participates in social media on behalf of the company. Facebook is the social media channel of choice, used by 68 percent of the CEOs, followed by 44 percent who participate on the company blog and 35 percent who participate on Twitter. www.markettools.com



... retailing

Fashion faves

Women like buying what Kohl's is selling

Kohl's is the nation's favorite fashion retail chain, according to Market Force's annual consumer study. 2011 was the third year in a row that Kohl's earned the top spot. Nordstrom ranked as consumers' second favorite, followed by Macy's, Dillard's and JCPenney.

Market Force, a Boulder, Colo., research firm, surveyed almost 7,000 consumers across North America and asked them to select their favorite fashion retailer from a list of 91 national chains. Results were first tallied based on the number of total votes, where Kohl's took a clear lead with 16 percent of the vote total. Market Force then indexed the findings by store count. The results showed that Kohl's was still consumers' top choice.

Before the votes were indexed,



IN FOCUS // Survey Monitor

Kohl's earned the most total votes, while JCPenney amassed the second most, followed by Macy's, Walmart and T.J.Maxx. Once indexed, brands like Walmart, Target and Dress Barn still made it into the top 16 but landed toward the bottom of the rankings.

"Kohl's has achieved that great balance of broad selection and good prices, particularly in the casual clothing sector. But notice that Nordstrom secured second place and specialty stores like Coldwater Creek and Ann Taylor Loft came in sixth and seventh," says Janet Eden-Harris, chief marketing office for Market Force. "Those results might suggest that consumers are loosening their pocketbooks in favor of quality over a bargain for select fashion items."

Market Force also looked at how the favorite fashion retail chains compared in different categories to determine if certain attributes set apart the leaders from the rest. Kohl's performed consistently well across the board, leading in almost every category, including no-hassle returns, prices, easy parking, dressing rooms, atmosphere and customer service. Marshalls was the only retailer that received high marks for loyalty program benefits. Macy's trumped the others for offering the widest assortment of clothing and accessories from specific designers.

However, while consumers have their favorites they're also willing to branch out and try new fashion retailers. In 2011, consumers tried new brands at a higher rate and bought more when they did. Thirty-two percent of consumers surveyed in October 2011 reported trying a new fashion retailer over the past 90 days, up from 14 percent in 2010.

2011's No. 1 fashion retailer Kohl's received the most new trials by consumers, followed by Abercrombie & Fitch and H&M. But new trial is heavily influenced by the proximity of stores to consumers; so larger brands will tend to dominate. When indexed, H&M convinced the largest number of consumers to visit one of their stores for the first time, followed by Nordstrom,

Anthropologie, White House|Black Market and Coldwater Creek. Of those surveyed who tried a fashion retailer for the first time, 75 percent said they made a purchase during that visit, up from 59 percent in 2010.

A friend's stamp of approval wields significant influence in the decision to walk into a new retailer. The survey found that recommendations from friends are the top impetus for consumers to try a new store, followed by "just an impulse to go shopping." Really great sales, promotions and discounts and the inability to resist an item they love were other factors that weighed heavily in consumers' new store trials. The reasons given for not making purchases at a new retailer were high prices or the inability to find sale items.

The study also showed that consumers use online research extensively be-

fore shopping but manage online relationships with retailers carefully. For example, the majority (73 percent) said they research prices online before they head to the store and one-third turn to social media for information about fashion retailers or clothing brands. However, few follow retailers on Twitter (7 percent, up from 2 percent in 2010) or friend them on Facebook (38 percent). Social media advertising plays a very small role in influencing consumers to try new retailers. So, while consumers acknowledge that social media is highly influential in their shopping choices, it appears that conversations with friends are much more impactful than the social content pushed by the retailer.

However, social media does appear to be playing a larger role in their online research. In Market Force's 2010 retail survey, one in 10 respondents

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said they had read an online post or blog about a specific retailer or brand of clothing. That number jumped to 37 percent in 2011. Additionally, 7 percent of consumers in this year's survey had blogged or created an online post about a specific retailer or brand of clothing.

Not surprisingly, consumers continue to be conscious of spending this year. Most consumers (74 percent) reported spending an average of less than \$100 per month on clothing, while one-quarter said they spend up to \$250 every month, similar percentages were found in the study a year ago.

www.marketforce.com



●●● mothers Small group, big influence

The social impact Mom Bloggers

Mom Bloggers, defined as women who have at least one child in their household and have read or contributed to a blog in the past 30 days, make up 14 percent of all American moms (defined as women with at least

one child in the household). However, according to Scarborough Research, New York, Mom Bloggers' social and political influence reaches far beyond the confines of the playground. Mom Bloggers are much more politically involved and socially mindful than their non-blogging counterparts.

Over three-quarters of Mom Bloggers assert that they always vote in presidential elections, while 45 percent always vote in state elections. In terms of party identification, 29 percent of Mom Bloggers self-identify as Democrat, 25 percent as Republican and 29 percent as Independent. Seventeen percent choose none of these labels to describe themselves. Mom Bloggers are more than twice as likely as all mothers to have contributed to a political organization in the past 12 months.

While no single political party unifies Mom Bloggers, they find consensus via cultural and environmental issues. They are more than twice as likely as all moms to have contributed to an arts/cultural organization. Additionally, Mom Bloggers are 75 percent more likely to have contributed to a social care/welfare organization and 64 percent more likely to have contributed to an environmental organization. In fact, Mom Bloggers are 85 percent more likely than all mothers to support a politician based on environmental issues and they are 38 percent more likely to have done volunteer work in the past year.

Taking a demographic look, Mom Bloggers are 52 percent more likely than all mothers to have completed a college or post-graduate education. Though they are roughly the same average age (37) as moms overall, the average household income for Mom Bloggers is \$14,000 higher, totaling \$84,000 per year. They are 88 percent more likely to pay more for eco-friendly products and services and 89 percent of Mom Bloggers have children between the ages of two and 11.

Buying behavior for Mom Bloggers is consistently motivated by envi-

ronmental concerns and awareness. Mom Bloggers are 69 percent more likely than all moms to buy organic food on a regular basis. They are also 46 percent more likely to purchase locally-grown food. Additionally, Mom Bloggers are 49 percent more likely than all mothers to buy eco-friendly cleaning products.

In terms of media consumption, Mom Bloggers were 38 percent more likely to have visited a broadcast TV Web site in the past 30 days and 51 percent more likely to have visited a newspaper Web site in that time. Mom Bloggers are 20 percent more likely to listen to news radio and 58 percent of Mom Bloggers watch the local news on television. Mom Bloggers' online habits are also illustrative. In the past 30 days, nearly all (90 percent) Mom Bloggers have visited a social networking site; 77 percent checked the weather; more 70 percent paid bills online; and nearly half browsed the Web for coupons.

www.scarboroughresearch.com



●●● social networks More harm than good

Despite social networks' ubiquity, adults think they're bad for kids

Social media use is becoming more prolific among all age groups but not all Americans agree it's appropriate for all ages. While social networking

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sites offer the promise of connectivity, friendship and information constantly streaming in, the majority of American adults (53 percent) believe that social media is harmful to the development of today's youth, according to a national telephone survey of registered voters by Poll Position, an Atlanta research company. Twenty percent said it is helpful in the social development of youth, 17 percent said it is not making a difference either way and 11 percent did not offer an opinion.

Among men, 22 percent said it is helpful, 17 percent said it is not making a difference and 9 percent had no opinion. Among women, 18 percent found social media helpful in the social development of young people, 17 percent said it is not making a difference and 13 percent did not have an opinion.

Republican respondents rated social media the most harmful at 65 percent, compared to 40 percent of Democrats and 54 percent of Independents.

www.pollposition.com



••• brand research

Top trusted brands of 2011

Retailers and investment firms shine; Internet and TV service providers suffer

USAA, Amazon.com, Costco, Edward Jones, Hyatt, Sam's Club, TriCare,

Kohl's, Walgreens and Lowe's earned the top 10 spots in the 2011 Temkin Trust Ratings, a report from Waban, Mass., research company Temkin Group that examines the level of trust that consumers have in 143 large U.S. companies. The research is based on a survey of 6,000 U.S. consumers, who rated their recent customer service interactions with companies across 12 industries. Only eight companies earned "very strong" ratings while 26 earned "very weak" ratings.

The study uses the Temkin Trust Ratings to gauge consumer feedback for airlines, banks, credit card issuers, health plans, hotels, insurance companies, insurance carriers, investment firms, Internet service providers, retailers, TV service providers and wireless carriers. Three companies showed up twice in the bottom of the ratings: Comcast, Charter Communications and HSBC. The other companies in the bottom 10 of the 2011 Temkin Trust Ratings are CIGNA, Time Warner, U.S. Bank and Anthem.

In the overall results for the 12 industries, retailers and investment firms received the top scores, with an average rating of "strong." The bottom two industries, Internet service providers and TV service providers, earned an average rating of "very weak."

www.temkingroup.com

••• auto research

Does Gen X/Y care about cars?

Auto industry faces future of lukewarm loyalty

During the past decade, automobile manufacturers have experienced a steady decline in customer loyalty for specific brands. The faltering economy, bankruptcies and product safety issues have taken a toll on automotive brand loyalty, as 48 percent of respondents in 2011 plan to buy the

same brand of car as they currently own, down 7 percent over the past decade, according to the GfK Automotive Intentions and Purchases Study from New York research company GfK Custom Research North America.



But recession and recalls aren't the only things at play. In fact, these may not be the reason consumers do not replace one brand with the same brand. Generation X (born 1965–1980) and Generation Y (1981–1994) have yet to demonstrate anywhere near the loyalty of their older counterparts. Gen X and Gen Y have the lowest loyalty factor of all age groups. Consequently, Gen X and Gen Y's ever-increasing presence in the automotive marketplace will continue to pull overall brand loyalty downward, assuming current allegiance levels remain the same.

Gen X and Gen Y are more concerned with their home entertainment systems, smartphones and the Internet than the car they drive. Automobile marketers must develop a method to reach these consumers and offer them automobiles that may incorporate some of the connectivity technology they consider most important to them.

"Automotive brands need to be aware of the effect of disenfranchisement among both Generation X and Generation Y and ensure appropriate product and marketing efforts," says Doug Scott, senior vice president of GfK Automotive. "Younger purchasers, Generations X and Y, are least brand loyal, while Boomers and Pre-Boomers remain brand loyal."

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TRUST IN RESEARCH



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IN FOCUS

Product and Service Update

●●● online communities Adding MROCs to quant

MarketTools expands offerings with quick-hit communities

San Francisco research company MarketTools Inc. has added a market research online community (MROC) service to its portfolio. MarketTools Pop-up Communities is a full-service MROC designed for short-term engagements (two to six weeks) to allow clients to add qualitative insights to quantitative research studies.

MarketTools Pop-up Communities aims to provide the benefits of MROCs with fast, useful insights and a low total cost. MarketTools Pop-up Communities can be used to probe the results of quantitative research and to provide additional insights to existing research.

www.markettools.com

●●● social media research How's your word-of-network?

Harris Interactive's WON for measuring digital WOM

Rochester, N.Y., research company Harris Interactive has launched WON (word-of-network), a panel-based approach to social media measurement

and influence designed to monitor the nuanced sentiment of a target market. WON offers quantitative categorization of comments about brands based on their positive, negative or neutral sentiments. WON also controls for volume of conversation around a brand and provides clients with a means to predict brand performance.

The WON metric is based on an opted-in panel of over 50,000 people. Harris Interactive monitors the panel to determine the extent of online conversation about a brand or topic, as well as key demographics, such as sex, age, income and any other key variables, of those who are contributing to the online conversation.

WON is a segment of Harris Interactive's BrandLife Tracking program. www.harrisinteractive.com

●●● consumer research Demystifying purchasing habits

DecisionVue 360 helps brands assess where they're going wrong

Maritz Research, St. Louis, has launched DecisionVue 360, a research analysis product designed to minimize the guesswork involved in how customers purchase a product or service – or move on to a competitor. DecisionVue 360 aims to provide a customer-centric view at key decision points in a buyer's acquisition journey and deliver feedback on how to adjust marketing strategy and tactics while there's still time to intercede and capture sales.

DecisionVue 360 uses brand rejection analysis – providing insights into what factors cause a brand to be eliminated from consideration as well as when and why it is eliminated in different parts of the decision lifecycle process. DecisionVue 360 uses a proprietary cohort analysis to measure user engage-

ment over time. This is intended to help marketers understand how the purchase cycle is working for their product category, their brand and how a customer's consideration set changes over time.

<http://maritzresearch.com/dv360>

●●● hispanic research Acculturation 2.0

New model takes attitude and behavior into consideration for Hispanic acculturation

Marketing Research Services Inc., Cincinnati, has introduced a new Hispanic acculturation model to help marketers and advertisers segment the Hispanic market. Acculturation is the process where cultural traits are adopted, lost, combined and created. In turn, these traits have an impact on ideas, values, conventions and behaviors.

This model goes beyond relying primarily on language preference and demographics and incorporates attitudinal and behavioral dimensions. By incorporating these dimensions, the model aims to provide better insights on the Hispanic consumer, their perceptions and their shopping behavior.

www.mrsi.com/hispanicacculturation

●●● mobile research Mobile Posse offering grows by two

Three companies partner to launch mobile survey and panel solutions

Research companies SurveySwipe, Seattle, and iPinion, Columbus, Ohio, have partnered with McLean, Va., mobile solutions company Mobile Posse to launch MobiSurvey and MobiPanels.



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MobiSurvey is intended to allow marketers and consumer-research analysts to survey owners of all phone types, including smartphone and feature phone users that do not have data plans. MobiSurvey provides full account management support.

MobiPanels is designed to use the MobiSurvey tool to reach a large audience at either a local or national level. It offers a nationwide panel of more than 10 million mobile consumers and a growing list of panels based on various customer segments, including Hispanics; African-Americans; superstore shoppers; new mobile handset owners; pet owners; e-book readers; coupon users; and back-to-school shoppers. Custom panels can be developed within 48 hours and be targeted to a specific demographic or audience type. www.mobileposse.com

●●● consumer research Profiling the shopper

Segmentation tool helps retailers make sense of consumer behavior

Chicago research company SymphonyIRI Group Inc. has released EconoLink, a segmentation solution intended to group shoppers into a series of unique profiles to enable consumer packaged goods retailers and retailer marketers to better understand how their categories, brands and stores are performing. The profiles include Downtrodden; Cautious and Worried; Start-ups; Optimistic; Carefree; and Savvy Shoppers.

The segmentation solution aims to assist marketers as they develop new product, promotion, merchandising, pricing and store layout strategies to cater to each audience profile. EconoLink also offers details

about shopper strategies ranging from pricing preferences; use of in-store technology; level of home research through both traditional and online activities; couponing strategies; and retailer preferences and provides a look at shoppers' financial attitudes, demographics and the impact of the recession on each group's shopping decisions. www.symphonyiri.com

●●● customer experience Comparing with competitors

CEBenchmarks allows clients to see how they measure up

Maritz Research, St. Louis, has debuted CEBenchmarks, a customer experience measurement benchmarking tool designed to enable companies to understand how they stack up to competitors on key customer experience measures, both within and outside their industry sector.

CEBenchmarks collects data on a continuous basis and delivers quarterly benchmarks on 31 categories of customer experience activity across several industries, including automotive; retail and restaurants; hospitality; insurance and investments; wireless; cable and Internet; and banking and finance.

With the benchmarking tool, clients can determine how they fare versus competitors on key metrics and selected attributes; examine differences within important contexts, such as transaction type; discover which elements of their customer experience need improvement; and look at best-in-class comparisons to leading brands in other industries. www.maritzresearch.com/cebenchmarks

●●● mobile research MarketTools goes native

Mobile research solutions enhance Survey Manager offering

San Francisco research company MarketTools Inc. has included mobile market research solutions as native components of its MarketTools Survey Manager market research platform. MarketTools mobile research solutions aim to give clients more ways of reaching and engaging with their audiences on smartphones and tablets, namely for in-the-moment shopper research, mobile advertising testing, event evaluation and path-to-purchase research.

Studies can be initiated using e-mail invitations, text invitations, QR codes and more and can implement a variety of question types. www.markettools.com

●●● diy research Set-it-and-forget-it solution

Peanut Labs debuts SurveyTool.com for simplified DIY

San Francisco research company Peanut Labs has released SurveyTool.com, a DIY survey software designed to offers access to Peanut Labs' sample pool of respondents, sourced from a network of social media and gaming sites worldwide such as Facebook, EA, Pogo and IMVU.com. Users can launch their surveys directly to over 50 million consumers across hundreds of Web sites and target the demographic segment of their choice.

With 24-hour access, SurveyTool.com also allows users to conduct tracking or periodic surveys automatically. Once the survey is created, users can control the frequency.

Sample is available in the U.S., U.K, Australia and Canada, with plans to expand into additional markets in 2012. Users can register for a complimentary personal account with limited access to survey capabilities.

www.surveymtool.com

●●● customer experience

Pinpoint opportunity for improvement

Tool designed to help companies act on customer feedback

Boston research company Chadwick Martin Bailey has debuted Pinpoint Suite, a customizable collection of Web-based tools to improve the usefulness of customer feedback. Pinpoint Suite is designed to integrate with existing customer feedback measurement programs to let managers build and strengthen customer relationships and lead performance improvement.

Pinpoint Suite aims to engage managers at each level of the organization and is customized to support specific roles within the company. At the executive level, Pinpoint Suite's insights and tools help executives prioritize decisions, set plans and allocate resources. For managers, Pinpoint Suite lets them close the loop on systemic issues by providing tools that identify problems to fix, list potential solutions, enable a planning mechanism and track the results of the actions taken. Real-time insights let frontline staff identify, understand and resolve individual service failures as they occur.

www.cmbinfo.com/pinpointsuite

www.quirks.com

●●● b2b research

Partnership brings D-U-N-S to panels

Independent business info aims to add further segmentation attributes

Research Now, Plano, Texas, has launched a screening tool designed to provide users with additional insight on B2B respondents. The tool is intended to work in conjunction with the pre-screening process to provide clients Dun & Bradstreet's D-U-N-S Numbers and SIC codes on B2B respondents from Research Now's global panels. Clients can then use the D-U-N-S Number to link back to their own data and uncover further segmentation attributes for more in-depth analysis. If a client does not currently have the D-U-N-S Number integrated into their data, they can work with Dun & Bradstreet to cleanse and match their data to D-U-N-S Numbers.

www.researchnow.com

●●● online research

Could Sunrise give you perspective?

Companies collaborate to launch online listening tool

Research companies StrategyOne, Washington, D.C., and Crimson Hexagon, Boston, have partnered to develop Sunrise, a daily multilingual digital media measurement and analytics tool. Sunrise aims to provide clients with a perspective on the conversations and underlying trends that impact the attitudes of key stakeholders.

Sunrise offers narrative-driven analytics comprised of observations,

insights and curated online conversations and media; tracking, trending and analysis of messages, topics and industry concepts; sentiment and mention volume tracking across competitors; brand and corporate reputation descriptors tracking; and comprehensive analysis of relevant conversation from online news, blogs, Twitter, Facebook, message boards and other sources.

www.strategyone.com

●●● ad research

Crowd Science bolsters ad targeting offering

CITRUS sees social media and brand awareness updates

San Jose, Calif., research company Crowd Science has added two features to its CITRUS platform for online publishers. Make it Social and Brand Target are designed to allow users to segment their audiences and target advertising to them based on social media engagement and brand awareness.

Make It Social allows publishers to segment and target audience based on social media engagement (Influencers, Engagers and Non-users) for social platforms like Facebook and Twitter. These new audience-targeting options aim to allow publishers to differentiate their audience and advertisers to better tailor their creative and messaging.

Brand Target enables publishers to gather detailed audience data about awareness or ownership of specific brands. Publishers can then offer brand advertisers a way to better pinpoint the audience most likely to respond to branded campaigns or upsell and cross-sell opportunities.

www.crowdscience.com

●●● mobile research Ipsos panels go mobile

Survey Analytics tapped to support Ipsos Loyalty Mobile Network

Research companies Ipsos Loyalty, New York, and Survey Analytics, Seattle, have partnered to offer clients mobile research panel capabilities through the Ipsos Loyalty Mobile Network. The Ipsos Loyalty Mobile Network provides clients the ability to recruit mobile research panels using a controlled, by-invitation-only method. Panelists are sourced from the customer databases of partner companies and panelists can talk to each other, come up with their own ideas and have other panel members vote on them. Customers can also be recruited on-location using QR codes. The Network will use Survey Analytics' Survey Swipe and Survey Pocket mobile applications for mobile panels and in-person data collection.

www.surveyanalytics.com

●●● e-tailing Relevantor launches e-marketing tool

A new content optimization service on the scene

New York marketing company Relevantor LLC has launched its Web marketing service designed to address bounces and abandonments using relevant content optimization. Dubbed Relevantor, the service aims to give site administrators a variety of ways to regulate how their content is presented to each site visitor and minimize the risk and cost of targeting a diverse

audience with a generic landing page. A site equipped with Relevantor can display the content each visitor is likely to find most engaging based on factors including geographical location; time of day; organic search terms; referring Web sites; and previous visits.

www.relevantor.com

●●● research incentives Pay it Fund Forward

App aims to simplify payment process for researchers and participants

Ixaris, a London electronic payments company, has launched Fund Forward, a payment application designed to allow businesses to send funds using virtual and plastic cards to anyone in more than 200 countries. Fund Forward is a cross-industry application providing a simple, customizable solution for payment in the market research, travel and e-commerce industries.

Fund Forward is intended to provide open access to the Visa, MasterCard and global money transfer networks. With Fund Forward, a business's customers will be able to instantly send money through a fully-branded Web application that supports multiple languages and currencies.

www.ixaris.com

●●● Briefly

■ State College, Pa., research company VideoMining Corporation has launched the fourth wave of its C-Store Shopper Insights (CSI-4) study. The program will use VideoMining's in-store measurement and analytics in a national panel of 120 stores with cooperation from 12 convenience retailers.

www.videomining.com

■ Mobile Posse, a McLean, Va., mobile solutions company, has announced an

owner insights research program for mobile carriers and device makers. The New Handset Owner Research Program aims to give handset manufacturers and carriers behavioral insight into new handset owners by surveying over 100,000 new handset users that have had their phone less than 48 hours. Executed monthly, the program covers more than 100 different devices by 10 different OEMs across four carriers.

www.mobileposse.com

■ Chicago research company Synovate has released the findings from Media Atlas China, its syndicated cross-media study conducted in China, surveying 66,000 consumers across 88 tier-one-to-tier-five cities and rural areas across mainland China.

www.synovate.com

■ Kinesis Survey Technologies LLC, Austin, Texas, has added a quick-poll feature to its Kinesis Community market research online community solution. The community quick polls are intended to support use from both computer and mobile devices. The addition of multimode quick polls aim to enable researchers to insert short research questions with single or multiple choice answers into a community Web page that displays appropriately according to the utilized device and browser.

www.kinesissurvey.com

■ Denver research company Qualvu has launched the Qualvu Affiliate Program to give firms a mobile app for in-the-moment video consumer feedback collection and an online platform for online video-based qualitative research analysis. The program offers firms an opportunity to sell their own custom, digital qualitative research solutions without a large up-front investment or a long development cycle.

www.qualvu.com

■ Stockholm, Sweden, research company Tobii Technology has launched a free Tobii plugin for Okemos,

Mich., research software company TechSmith's Morae usability software. The plugin is designed to augment eye-gaze data with metrics measured by Morae to provide psychological analysis that reveals insight into innate, unspoken user behavior during usability testing.
www.techsmith.com

■ Salt Lake City research company Mindshare Technologies has added a QR code feature to its enterprise feedback management platform.
www.mshare.net

■ San Francisco research company Userlytics has released a white-label version of its flagship platform. The white-label offering aims to enable users to integrate Userlytics' proprietary testing and analysis solution into existing research tools or to offer it as a stand-alone, private-label product. Firms have the flexibility to run the solution in house or to outsource some capabilities such as participant recruitment and QA testing of video results to Userlytics.
www.userlytics.com

■ Chicago research company SymphonyIRI Group Inc. and New York audience marketplace developer Legolas Media have partnered to launch a platform designed to allow consumer packaged goods marketers to create customized audience segments;

use them immediately in advertising buys of premium inventory on chosen Web sites; and optimize marketing campaigns on the fly.
www.symphonymyri.com

■ Palo Alto, Calif., research company SurveyMonkey has built its own panel, recruited from its pool of survey takers.
www.surveymonkey.com

■ San Leandro, Calif., research company Opinionmeter International has expanded its network of exclusive licensees with the addition of Leading Minds, a Lebanon business consulting firm. Leading Minds will introduce Opinionmeter's customer experience management tools to the Lebanese market research sector.
www.opinionmeter.com

■ Stream Research, Hertfordshire, U.K., has launched My H(appy) Life, a qualitative syndicated study designed to examine what consumers need from their apps. The research will cover the U.S., U.K., Italy and France, with 12 one-on-one ethnographic interviews and three focus groups to be conducted in each market.
www.stream-research.com

■ New York research company Affinity LLC's American Magazine Study (AMS) will begin reporting total brand audience estimates for

magazines on a quarterly basis in 2012, beginning with the spring report. AMS surveys over 60,000 consumers annually to report the total unduplicated reach of magazine brands cross-platform.
www.affinityresearch.net

■ Research companies Vision Critical, Vancouver, B.C., and CreaMetric, Moscow, have partnered to create a Russian community panel.
www.visioncritical.com

■ Miami research company eCGlobal-Panel Corporation has been renamed eCGlobal Solutions. Along with the new name, the company has also debuted a new logo, Web site (www.ecglobalsolutions.com) and tagline: Enabling Smart Connections.

■ The Association of Minority Market Research Professionals, Chicago, has launched a new Web site at www.ammrp.org.

■ Forte Research Group, New York, has designed a company Facebook page at www.facebook.com/pages/Forte-Research-Group/136657396417619.

■ NIPO Software, an Amsterdam, Netherlands, research software company, has added a second Silver competency to its Microsoft Partnership for Web development.
www.niposoftware.com

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Going social with qualitative research

| By Kelly Hancock

snapshot

Social media data offers qualitative researchers and their clients a potentially rich lode of insights.

It's no secret that our world is changing every day: The way we talk to people, the way we seek information, the way we do business. Many of these changes can be attributed to a phenomenon we all know as social media.

While many companies are embracing social media as a marketing or public relations tool to interact with consumers or measure how many people are engaging with the brand, a growing number of qualitative researchers are latching onto the social sphere as a place to dig into consumer behaviors and opinions. "Most people are focusing on the marketing and PR side of social media," says Kendall Nash, senior qualitative consultant at Burke, Inc. and a member of the Qualitative Research Consultants Association (QRCA). "But that's not what we do. As qualitative researchers, we dig for insights."

"Social media is underutilized in qualitative research. I spend a fair amount of time educating clients about why that data shouldn't only be used in the PR department," says Kathy Doyle, president of Doyle Research and a QRCA member. "There is a lot of misunderstanding about how it can be used and the insights it can deliver."

Qualitative researchers use a trained eye to look beyond the obvious and pinpoint trends and translate statements into insights. That knowledge is harvested from online forums, such as social media posts and comments, and key pieces of actionable information are identified from the millions of conversations that occur publicly every day.

"A lot of companies are using it in a quantitative fashion. It's really qualitative information that they're trying to quantify," says Dorrie Paynter, president and founder of Leapfrog Marketing Research and a QRCA member. "As qualitative research consultants, our role is to help our clients figure out what the data says and how to act upon it."

One piece of a larger approach

Many qualitative researchers who use social media agree that it provides unparalleled opportunities for insight. At the same time, it is commonly viewed as one piece of a larger approach. There are numerous ways that social media analysis can accompany, supplement or guide traditional research efforts. "It's really helpful to use data and analytics to get some context before you talk to consumers," says Ben Smithee, chief executive officer at Spych Market Analytics and a member of QRCA. "It helps determine what topics need further engagement."

Social media analysis can often be used as the first phase of a mixed methodology. When starting with a broad category, mining posts and comments on social media channels can help pinpoint areas that consumers care about the most. "When a client said, 'Tell me what people think about electronics' the research objective was so broad that we needed to set research parameters before we could get to the real insights. Social media expedited that process," Doyle says. "In this situation, the use of social media analysis as a first step actually saved our client money by allowing us to define the target and identify the issues to



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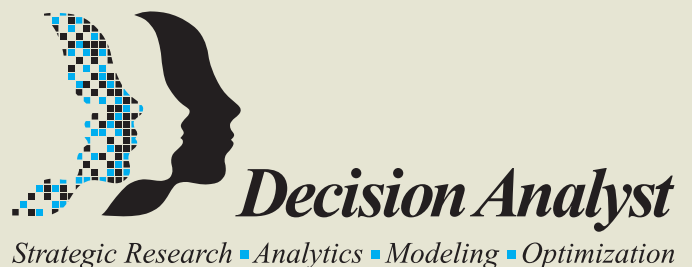
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explore further with more traditional qualitative methods.”

Nash agrees that using social media analysis as a precursor to traditional research tactics helps prioritize areas and narrow topics that warrant the most time. “It helps eliminate surprises. I look for hot topics that could come up in a focus group or interview so I can be prepared to guide the conversation and get the information we really want to know,” she says. “Social media is a piece of the story, but it’s not a replacement for traditional research.”

Chat candidly

One benefit of social media research is observing consumers in their natural environment. People who are familiar with the product/service chat candidly about what they like, what they don’t like and what they expect from a brand.

Renee Murphy, digital and social media research consultant at Seek, explained one situation where social media revealed a negative connotation around the form name (think liquid vs. gel) the brand was using to describe a product. “We found the form name highlighted some of the inherent issues consumers were having with the product, detracting from its proposition. With further analysis, we were able to find a dif-

ferent name that consumers already associated with the product and that didn’t highlight the negative aspects. That gave my client an opportunity to rebrand and emphasize the benefits instead of simply describing the product,” she says.

Taking it further, understanding how consumers talk about a product or understanding what they expect delivers invaluable direction on how to market a product. “If we can discover the language consumers are using, it makes it easier for marketers to relate to consumers and sound like a consumer in their advertising and communications efforts,” Doyle says.

Nash adds, “It makes me a better researcher when I have a general grounding in the category to make sure I understand the terminology and nuances surrounding a brand, product or industry.”

Another benefit

That firsthand glimpse of how consumers talk about a product reveals another distinct benefit: alternative product uses. “We know that people are using coffee filters to make their coffee, for example, but what else are they using them for?” Murphy says.

“We’re looking for fun, new or interesting ways people are using the

product. We’ve helped clients discover key product benefits they didn’t even know existed,” Doyle adds.

Or, in some situations, it’s less about usage and more about audience. Social media research can reveal groups of people outside the target audience who are using the product. “I had a client who was targeting athletes trying to lose weight. Through social media research, we found a whole subculture of people using the product who weren’t dieting at all,” Murphy says. “It may have ended up as one small part of their audience segmentation, but knowing there were more people using the product than originally thought – and for a very different purpose – changed the way they shaped their key messages and marketing efforts.”

In addition, social media research can supplement traditional new-product development research. It can be used to discover what people are saying about competitive products or unmet needs in the marketplace. “Social media is a great way to find pain points and compare unmet needs,” says Murphy. “It shows what’s working for you or your competitors and what isn’t working.”

“One of my clients wanted to enter a product category that was new to them, yet a logical extension of their brand,” Doyle says. “We did a social media search to see what people were saying about the existing players in that category. We were able to discover what consumers liked and didn’t like, which played a role in the actual design of the product. It helps you find the white space in a product category and capitalize on it to differentiate yourself.”

Avenue to recruit

With the vast array of lifestyle choices and demographic information consumers post publicly online and their growing willingness to connect with a brand, social media becomes an avenue to recruit respondents for in-person or online qualitative research. As more companies develop a social media presence, consumers – notably, brand advocates – are

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proactively connecting with brands, sharing and receiving information. Some researchers see these existing connections as a pool of potential respondents for traditional online or in-person research.

“In terms of recruiting, you can’t ignore social media venues as a possibility,” says Nash. “For some research projects, companies want to hear from brand advocates. We don’t actively engage directly with people in this space but if the company already has an audience online, we can provide an opportunity for consumers to link into our screening process, knowing we’ll likely hear from a group of people who are already dedicated to the brand.”


Just as social media is changing the way brands market to consumers, it’s also changing the way consumers expect to interact with a brand. More and more people are welcoming brands into their lives via social media platforms. Some consumers expect to experience

a brand online and expect that brand to hear their opinions via online channels. “Social media has equalized the opportunity to share a voice,” says Smithee. “I can be a consumer, have a good idea and have a valuable opinion. Social media makes it easier to find consumers who are influencing the brand and hear what they think.”

Develop digital strategy

Social media research can also help companies develop their digital strategy. Just like any other business function, brands need to carefully allocate resources for online touchpoints, including Web sites, social media engagement, online advertising, etc. “Social media can’t escape the metrics and analytics. Executives will always want to see the ROI,” Smithee says. “Where are marketing dollars being spent? How can we effectively manage all of our touchpoints? There’s a huge opportunity for qualitative researchers if we

understand those pieces.”

Murphy expands the idea by saying that companies can be overwhelmed by the increasing amount of data and increasing levels of interaction happening online. Compiling all the pieces and managing each channel presents an opportunity for qualitative researchers. “We need to watch digital trends and understand the brand’s objectives well enough so that research is specifically catered to each digital channel,” she says. “There are numerous points of data – Google, Facebook, SEO, QR codes, etc. With all this different data coming in, my job is going to go beyond just understanding social media data. Now you can put together the bigger story without even asking the questions, then dig even deeper by directly engaging with consumers.” 

Kelly Hancock handles communications for the Qualitative Research Consultants Association. She can be reached at khancock@hartinc.com.



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The numbers behind the number

| By Chris Szczepanski



snapshot

When clients fixate on a single score or measure as an indication of viability, or lack thereof, researchers must step in and help them see the bigger picture.

As researchers we sometimes encounter clients who focus on the score on a single measure within a study as if it represents the gestalt of respondent reactions to a concept, product or advertisement and its potential. This single score, be it purchase interest, recall or an attitude, is forced to carry an unjustified weight of responsibility as a critical determinant of a go/no-go decision. Achieve a score that satisfies the critical need and continue; fall short and a promising innovation might be cancelled.

Focusing on a single score, in most circumstances, overlooks and undervalues the supporting measures of a study. Even worse, such simplistic distillation is myopic, especially when a few points are the difference between crossing and not crossing the threshold.

When clients focus on the score to a single measure (“measure of focus”) within a study, there are often two types of reactions: take the number and run or stop everything. Such reactions are often akin to Type II (failure to reject) and Type I (incorrectly rejecting) errors, respectively.

Take the number and run

The score on the measure of focus crosses the threshold. The client, satisfied, especially if it is high, becomes unconcerned about the supporting numbers (i.e., all of the other diagnostic questions that were asked). There is no problem if both the score on the measure of focus and the data for the supporting questions are in sync. However, if the supporting numbers suggest

that real-world reactions may not be as promising as the measure of focus suggests, there may be a problem.

For example, a concept, product or advertising test could yield a high purchase interest score yet comparative measures, especially among non-loyal and competitive users, may suggest low motivation to switch. Product X is a wonderful product that category users would have no problem buying/using but it is not perceived to be an upgrade/replacement for what they currently buy/use. In other words, it is an acceptable product but, lacking consumer need or switching motivation, real-world purchasing of this product is likely to be much less enthusiastic.

Another problem is ignoring potentially critical shortcomings, such as a surface cleaner that works great but leaves behind residue or damages surrounding areas. These kinds of issues make consumers think twice about purchasing a product. The more likely they are to think twice, the less likely they are to buy the product.

Stop everything

The measure of focus yields a near-miss, a poor score, or, in some instances, a score that crossed the desired threshold but not convincingly. The client, engrossed by the score, decides it is time to pull the plug. Unfortunately, tunnel vision in situations like this prevents the client from seeing that the project may have suffered a false start.

The only way to know if it has is by exploring the supporting measures, such as



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reasons why/why not, perceived/actual performance ratings, etc. For example, a concept, advertisement or product can be undermined by muddled communication

Price is another, usually obvious, factor, but more important than the fact that it undermines purchase interest is why it undermines purchase interest.

or benefits unstated which are as important as those that are stated. Such communication can leave a consumer confused, uncertain and not knowing what to think or expect.

Price is another, usually obvious, factor, but more important than

the fact that it undermines purchase interest is why it undermines purchase interest. Is it too expensive relative to the competition, available alternatives or for what the consumer gets (if they understand what they are getting)?

By closely examining the supporting numbers, you can uncover reasons why the concept, product or advertisement underperformed and why it may still hold promise. More importantly, how the promise may be realized can be discovered, too.

That's not to say the promise is achievable (e.g., cost-of-goods may indicate otherwise) but at least the path can be uncovered.

Look at all the numbers

These examples represent potentially costly mistakes that can be guarded against by helping a client

to look at all of the numbers within a study. Deciding to move forward with a potentially crippling issue can lead to lost sales, lost usage occasions, slow consumption, disadoption and/or, worse, damage to the brand. Likewise, prematurely abandoning concepts, products or advertisements with promise could cause a client to miss out on a winning idea that just needs more development/fine-tuning.

Our clients are generally prudent guardians of their brand/product but some occasionally become consumed by a single measure of focus. It is our job to keep them from staring at the bark and, instead, to help them see the whole tree and, perhaps, how it may look in the forest. 🌳

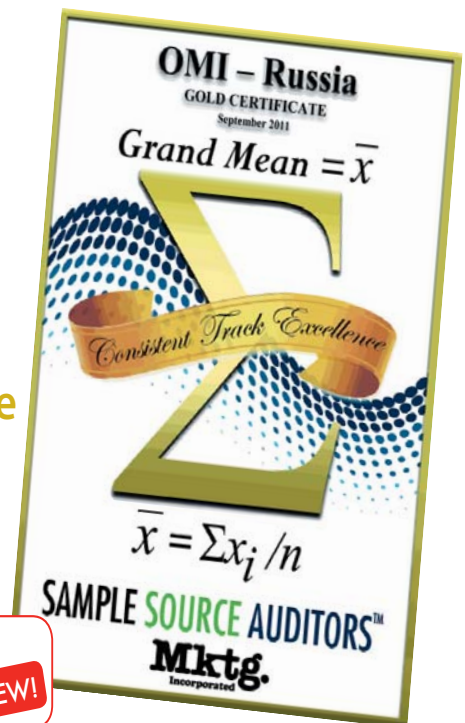
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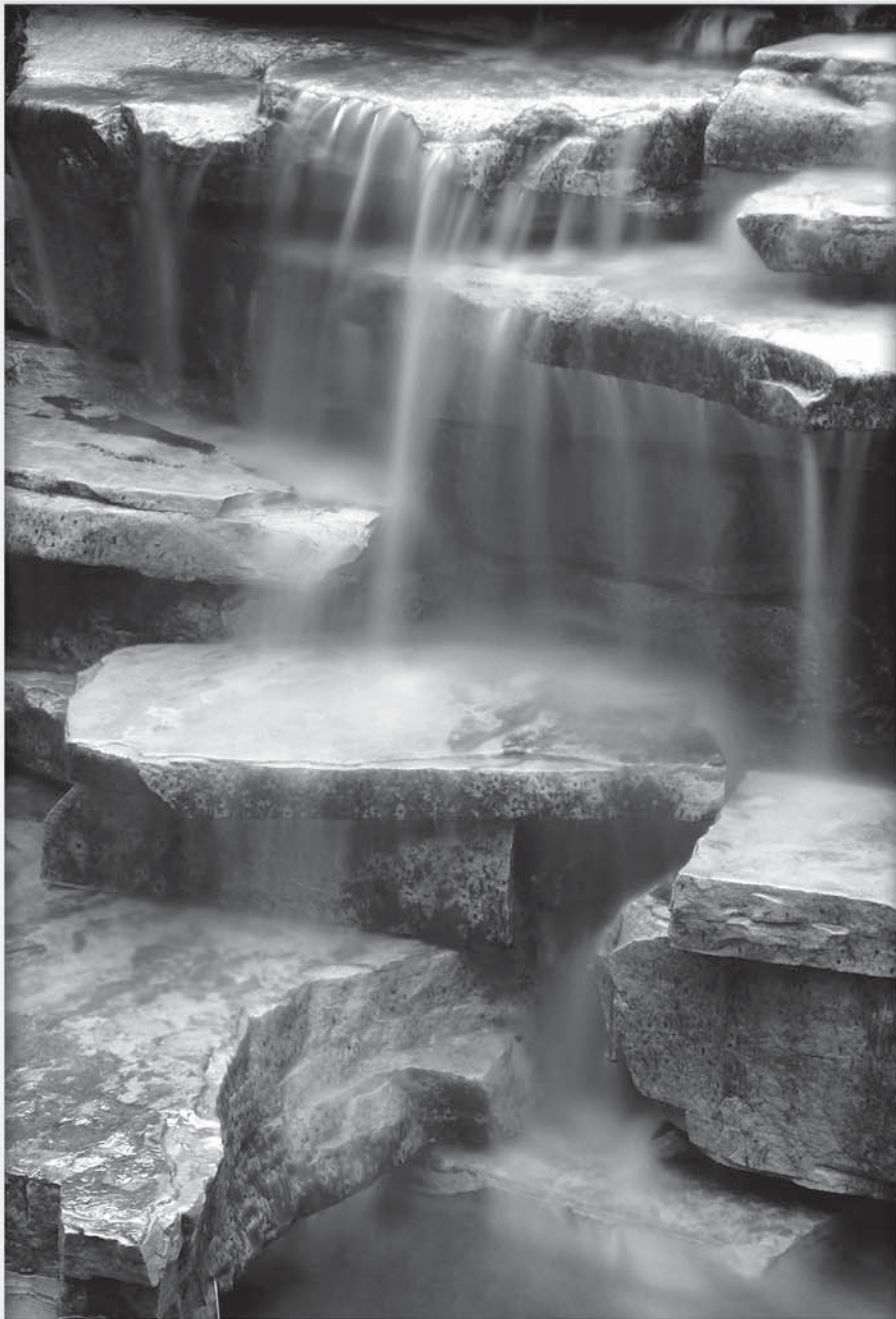
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The Fine Art of Marketing Research

Significant differences

| By Doug Berdie

snapshot

The author examines the reliance on tests of statistical significance in applied marketing research.

Since R.A. Fisher's *The Design of Experiments* (1935), statisticians have debated the legitimacy and usefulness of tests of statistical significance. Early writers discussed whether these tests should be limited to informing decisions (Neyman, Wald) or are legitimately used for theory-generated hypothesis testing (Pearson, Edgeworth, Yule and other Fisher disciples). Accelerated debate in the 1950s focused on the broader question of whether the tests are relevant at all and in which circumstances they are legitimate. *The Significance Test Controversy* (Morrison and Henkel, 1970) presents a good synthesis of this mid-20th century debate.

Within applied marketing research, tests of statistical significance have been routinely used over at least the past 40 years, with the results reported in many (if not most) quantitative research reports. Statistical software programs make it easy to conduct such analyses.

Earlier in *Quirk's Marketing Research Review*, Baldasare and Mittel (November 1994) and Grapentine (April 2011) discussed some problems related to using tests of statistical significance in marketing research. These include confusion between "statistical significance" and "practical significance" when interpreting test results; selection problems that interfere with sample randomness; and non-response bias that affects data representativeness. These authors point out that survey measurement effects (question order bias, unreliable/invalid question wording, bias from using mixed data collection modes, etc.) cause unknown bias that may outweigh the sampling error that tests of statistical significance are designed to assess.



Three aspects are relevant

Three aspects of testing statistical significance within marketing research are relevant: overall legitimacy of these tests; mathematical legitimacy of these tests; and relative usefulness of these tests.

Some have challenged whether tests of statistical significance are legitimate by arguing that the underlying frequency theory of probability requires assumptions of "infinite hypothetical universes" and other unreasonable assumptions. They conclude that without a sound underlying theory of probability, these tests should not be used. Others have argued the tests are a valid way of assessing theory-generated hypotheses unless strict experimental designs have been used. Although these debates are intriguing, they are beyond the scope of what follows and will not be discussed further here.

The mathematics underlying tests of statistical significance are less controversial. Hence, we will assume the mathematics are sound.

Today within marketing research, tests of statistical significance are conducted routinely when data from more than one sample or subsample have been obtained. When differences between two or more samples or subsamples are denoted, the question that usually arises is, are those differences statistically significant?

Sophisticated data analysts use tests of statistical significance as one tool for analyzing data. Rarely do they rely on such tests to the exclusion of other analytical techniques when they boil down data to find insights that will facilitate marketing decisions. However, some who analyze marketing research data rely too much on tests of statistical significance. The



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discussion below hopes to dissuade them from doing so.

Make sound decisions

The objective of applied marketing research is to describe market characteristics so business decisions can be facilitated. The more detailed and precise the information, the easier it is to make sound decisions.

When one places major emphasis on tests of statistical significance, one's focus becomes yes-no questions such as: Does Sample A differ from Sample B? The answers to such questions are minimally insightful, as they say nothing about the size of a difference that may exist and, without providing that information, decision-making insight is limited.

The following questions exemplify questions that 1) compare one group of people to another group and 2) compare a given group of people over time: How does the preference for Product A differ between women and men? Has the quality of our customer service changed over time?

Many marketing researchers would incorporate tests of statistical significance into their analysis of these questions. Doing so would provide answers such as, "Yes, women and men do differ" (or, "No, we cannot conclude that women and men differ"); and "Yes, our service level has changed" (or, "No, we cannot conclude that our service level has changed"). These conclusions say nothing about the level of preference for Product A or about the size of the customer service improvement/decline. As such, they provide limited insight.

A more useful conclusion to the first question would be, "Women like Product A better than men do." An even more useful conclusion would be, "About 5 percent of women like Product A compared to about 49 percent of men." And a much more useful conclusion would be, "Between 52 percent and 60 percent of women like Product A compared to 47 percent to 51 percent of men."

For the second question, a more useful conclusion would be, "Our service has declined." An even more useful conclusion would be, "Our service has declined by about 6 percentage points." And a much more useful conclusion would be, "Our service has declined by

4-8 percentage points."

The above conclusions facilitate decision-making more than do the simple yes-no conclusions from tests of statistical significance because they tell in which direction the difference is and they provide information as to the actual size of the difference. These more insightful conclusions result from standard statistics used to estimate populations from samples – confidence intervals and confidence levels – which allow us to state the percentage of the time we could expect the results we obtained to fall within a stated data interval.

We see that the above "even more useful" statement ("About 56 percent of women like Product A compared to about 49 percent of men") contains point estimates of the true values for women and men. To make this statement "much more useful," we can select a confidence level (any with which we are comfortable) that allows us to statistically derive two confidence intervals (one for women and one for men) showing the percentage of the time the true population values for women and men can be expected to be within those derived confidence intervals. By deciding to use a 90 percent confidence level, we might reach the above, much more useful, conclusion, "Between 52 percent and 60 percent of women like Product A compared to 47 percent to 51 percent of men."

Nothing magical is required to conclude that more women than men like Product A. (Nor is it necessary, as it is with tests of statistical significance, to create a fictitious null hypothesis and use convoluted logic trying to reject it to reach such a conclusion.) We merely examine the confidence intervals for women and men to see that they contain no points in common. Then we conclude at a 90 percent confidence level that not only do women like Product A more than men do, we can see the actual values associated with both women and men. The answer to the question of whether women and men differ is seen to be of far less interest in itself than is knowing the actual values for women and men.

Applied statistics provides formulas to calculate confidence intervals and their associated confidence levels. These formulas take into account sample size,

market size (or, equivalently, population/universe size) being estimated and variation existing within the samples.

Confidence levels and confidence intervals are joined at the hip. As one changes, the other is inversely affected – unless sample size is increased. For example, each of the following two statements could be correct based on a given sample size:

"Between 34 percent and 42 percent of customers (90 percent confidence level) would like our retail stores to be open later."

"Between 32 percent and 44 percent of customers (95 percent confidence level) would like our retail stores to be open later."

One can choose any confidence level. By choosing a more stringent level (e.g., 95 percent compared to 90 percent) the confidence interval width will be wider. This is a useful and important because it allows marketing decision makers to decide the relative trade-off between confidence level and confidence interval width.

Statistical literature is replete with formulas for making these calculations. Not always recognized is that selecting the right formula requires considering a host of things including whether one is measuring at the categorical, ordinal or interval level and whether categorical variables being measured are to be reported as binomial or multinomial. In the latter case, one cannot use a simplified formula designed to determine the confidence intervals for yes-no questions if one wishes to determine simultaneously confidence intervals for each of five points in a five-point rating scale.

Two negative consequences

Many analysts, when confronted with piles of computer-generated tables, quickly scan them, earmark "statistically significant" results and ignore other data – based on a dubious assumption that only statistically significant differences between/among groups are important. This approach has two negative consequences. First, it assumes a result shown as statistically significant is worth further consideration – which is not always so. Second, some results that are not statistically significant may well justify further consideration.

These two consequences result from

Study 1: Small Sample		
Years as a Customer	Loyal to Retailer (s = 18)	Not Loyal to Retailer (s = 22)
<10 years (s = 20)	35%	65%
10+ years (s = 20)	55%	45%

Study 2: Large Sample		
Years as a Customer	Loyal to Retailer (s = 21,600)	Not Loyal to Retailer (s = 38,400)
<10 years (s = 30,000)	35%	65%
10+ years (s = 30,000)	37%	63%

the heavy influence of sample size on tests of statistical significance. Large enough samples almost always lead to statistically significant results and very small samples rarely do, as shown by the accompanying examples, where the proportionate difference in Study 1 between samples is very large (20 percentage points) yet does not reach a level of statistical significance (at the .05 or even at the .20 probability value), whereas the proportionate difference in Study 2 between samples is very small (only 2 percentage points) – much smaller than the difference between samples in Study 1 – yet does reach a level of statistical significance (at the .05 and even the .01 probability value).

Only designating “significant results” for further attention would ignore the results from Study 1. Yet seasoned research professionals would conclude from Study 1, “That’s a large, 20-point difference. Admittedly, the samples are small (and that’s a factor in why the results are not showing a statistically significant difference) but this is certainly worth investigating further given the marketing implications it may have.”

Similarly, a seasoned researcher would look at the results from Study 2, do a quick marketing cost-to-benefit calculation related to marketing to these the groups differently and, in most cases, ignore this “statistically significant” difference because it is meaningless in a marketing sense.

The best approach is to first scan the data tables to identify differences that are large enough to have a marketing implication and then to consider the confidence intervals around the numbers to see if they are tight enough to justify acting upon them.

The above negative effect is exacerbated

by the typical practice of specifying very low probability values (.05, .01) for the test. People do this to reduce Type I error (minimizing the odds of declaring a difference when there is not one). However, the trade-off for minimizing Type I error is maximizing Type

II error (increasing the odds of missing a difference that does exist). A focus on minimizing Type I error ensures that even fewer “statistically significant” differences will be found – limiting marketing options brought forward from the research. Surely, this is not helpful to business leaders who seek marketplace to identify opportunities.

Spurious results

By setting a probability value (i.e., a “level of significance”), one accepts that Type I errors will be made. A probability value of .05 dictates that about 5 “significant” results will occur for every 100 tests conducted – even if there are no “real” differences between/among compared samples. Many statistical analysis software packages will compare each table cell to all other cells in that row or, even, all other cells in the table.

Table 1

Q4: How would you rate the OVERALL QUALITY of [Name of Brand]							
	BRAND						
	TOTAL	1 (A)	2 (B)	3 (C)	4 (D)	5 (E)	6 (F)
Total Answers	720	211	38	118	159	86	108
0 Very Poor	2 0.3	0 0.0	0 0.0	1 0.8	0 0.0	0 0.0	1 0.9
1	2 0.3	0 0.0	0 0.0	1 0.8	1 0.6	1 1.2	1 0.9
2	8 1.0	0 0.0	0 0.0	1 0.8	2 1.3	1 1.2	3 2.8
3	20 2.7	C*10 4.7	0 0.0	1 0.8	3 1.9	3 3.5	3 2.8
4	45 6.3	9 4.3	5 13.2	5 4.3	10 6.3	9 10.5	6 5.6
5	150 20.8	46 21.8	6 15.8	29 24.6	35 22.0	17 19.7	18 16.6
6	92 12.7	24 11.4	8 21.1	11 9.3	20 12.6	12 14.0	14 12.9
7	148 20.6	41 19.4	10 26.3	26 22.0	26 16.4	16 18.6	D*30 28.8
8	154 21.4	45 21.3	7 18.4	25 21.2	41 25.8	15 17.4	21 19.4
9	66 9.2	B*F*27 12.8	1 2.6	10 8.5	14 8.8	8 9.3	6 5.6
10	33 4.6	9 4.3	1 2.6	8 6.8	7 4.4	4 4.6	5 4.6
Mean	6.6	6.7	6.4	6.7	6.6	6.4	6.4

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In a case where responses to a 11-point rating scale are displayed (with each rating point in its own cell) and these responses are shown for each of six subsamples ("brands" in Table 1), if each brand within a row is compared to each other brand in that row, there will be 165 statistical comparisons per table. Because of the probabilities involved, one should expect seven-to-eight spurious (i.e., meaningless) "significant" results to appear in the table.

The fact that Table 1 only shows four "significant" differences (highlighted with a red letter and *) suggests all these may be artifacts of Type I error – making it difficult to know which "significant" findings one should pay attention to and which should be ignored.

In the above disguised project, there were 68 ratings questions asked, which means the software made a total of $68 \times 165 = 11,220$ statistical comparisons. This number of comparisons could be expected to yield about 561 "significant results" even if no real differences exist among any of the six brands being compared. Savvy analysts minimize this problem by limiting the number of analyses to those of real interest. Doing so minimizes the spurious results associated with Type I error and increases the likelihood that revealed statistical differences reflect true underlying themes within the data.

Another problem with conducting tests of statistical significance on each table cell is trying to make sense of seemingly inane results. In Table 1, a "significant" difference exists between the percentage of "7" responses for Brand 6 and Brand 4 – as evidenced in the table by the D* under Brand 6 showing the comparison to Column E that contains Brand 4. Given the 11-point scale, making sense of that "difference" is challenging. And, one wonders, what possible marketing implication it might have. Brand 6 garners a higher percentage of "7" responses (28.8 percent vs. 16.4 percent for Brand 4) but this is offset by lower percentages of both "5" responses and "8" responses for Brand 6. What can that convey of real-world interest? Furthermore, the table shows no "statistically significant" difference between the means of those brands so, if one were to play the significance game, on the one hand one would see a "significant difference," while on the other

hand one would not. Over-application of tests of statistical significance does not lead to greater insight – it leads to interpretative chaos.

Indicates a misunderstanding

Test-of-statistical-significance advocates assert that lower probability levels indicate more meaningful differences between/among groups. Yet to claim a test result of .001 is more significant than a result of .05 indicates a misunderstanding of how probability values apply to tests of statistical significance and leads to confusion over practical versus statistical significance. A lower probability value attests to the confidence one can have that there is a difference between/among groups. It says nothing about whether the difference itself is meaningful in an applied marketing situation. However, due to linguistic confusion, when users assert they have found a "highly significant" finding (e.g., $p < .001$), this assertion tends to convey that the difference is a "really important" one. However, only if the magnitude of the difference has marketing implications should one be concerned about its statistical characteristics.

Why are they still used extensively?

If tests of statistical significance yield less insightful interpretations than techniques for estimation, how did their use become prevalent and why are they still used extensively? One might speculate as to reasons.

First, professors who teach tests of statistical significance (in business and social sciences statistics courses) typically are not engaged in applied marketing/social research themselves and conduct more theoretical research. Tests of statistical significance may be more relevant to academics because their interest is in testing hypotheses to see if the theories from which they derive find support from the tests.

Second, the results from tests of statistical significance provide an easy tool that allows researchers to make quick decisions without having to spend time digging into the data and working with decision makers to understand all the ramifications of the results on impending decisions. It is easier to conclude that the test shows

no significant difference, and therefore you should not market deodorant to women differently than you do to men than it is to say that the small sample size we used may be masking an important difference regarding how women and men react to deodorant marketing and, given the size of this market and dollar implications of the decision we must make, it may be wise to do some follow-up research before finalizing a segmentation go-no go decision.

Third, marketing research has its own set of esoteric terms and practices that can be used to enhance the credibility of its work. Tests of statistical significance fall into this category.

Fourth, marketing researchers who rely extensively on test-of-statistical-significance results are, in a sense, able to evade responsibility for making tough decisions. It is difficult to argue with someone who staunchly cites criteria that many colleagues share and support.

Fifth, most statistical analysis software packages contain programming that facilitates calculating tests of statistical significance. This makes it easy for applied marketing researchers to either program these tests themselves or request that others, "Run some crosstab tables and specify t-tests [or chi-square tests or some other type of statistical test] at the .05 level." However, merely having the capability to run a test is no guarantee it is legitimate or insightful to do so.


Little help

Tests of statistical significance used to compare two or more groups yield yes-or-no answers. They tell us that, yes, these groups likely differ from each other or no, we cannot conclude these groups differ from each other. When testing theory-generated hypotheses for the purpose of seeing if a theory is valid, these yes-or-no answers may be useful. However, when practical business decisions need to be made, merely knowing that one group differs from another is of little help without some estimate as to the size of the difference. Hence, placing primary focus on tests of statistical significance in applied marketing research is not advisable.

Clearly, tests of statistical significance are overused and often abused within applied marketing research. However, before marketing researchers

will adopt more insightful alternatives such as increased use of confidence intervals and confidence levels, these alternatives need to be emphasized in business and social sciences statistics courses. And, software packages for analyzing research data need to include options that allow users to easily and accurately run these analyses. One can hope these educational and accessibility changes occur quickly.

The additional insight provided by using statistics of estimation instead of

tests of statistical significance, and the more straightforward means of interpreting results from these tools, will enhance the use of marketing research data and help overcome a persistent criticism by business decision makers that marketing research data do not result in the level of insight desired to make sound business decisions. 

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How to be a good research client

| By Gerry Katz



snapshot

A veteran research vendor offers his advice to clients on working with research firms, including the RFP process, pricing and what each party should expect from the other.

A few years ago, I was approached by Ralph Oliva, the executive director of the Institute for the Study of Business Markets (ISBM) at Penn State University. The ISBM is a consortium of nearly 100 business-to-business (B2B) companies that meet several times a year to address some of the unique problems of B2B companies. He wanted me and Professor Abbie Griffin to put together a two-day general-overview market research course specifically for non-researchers at these types of companies.

This sounded like fun! But what particularly caught my fancy was his request that we include a unit on how to be a good client (i.e., how to be a smart purchaser of market research services). Most consumer products companies already have a formal market research function staffed by experienced market research professionals. But many B2B firms do not. And when it comes to the development of new products and services, where extensive market research is usually required, that decision will often be made by a project team leader who may have little if any experience in dealing with market research vendors.

While Oliva's request was certainly sensible, for me this was almost cathartic! I've spent just about my entire near-40-year career on the vendor side. And for anyone who has ever worked on this side, we all know the things that our clients do that make us crazy and too often detract from the quality of the final product. Much has been written about how to be a good vendor and what pleases clients. But here was my chance to tell a group of potential clients how I wish they would behave, something I've almost never had the nerve to tell them to their face!

So, as requested, Professor Griffin and I put together a unit in our course that addressed all of these issues. Some members of that first class felt that we were being entirely too self-serving – to which I plead guilty! Since then, we've refined the unit and delivered it several more



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times and I am more convinced than ever that we are doing these potential clients a helpful service. In essence, we are trying to teach them how to get the most out of their market research initiatives. But really, isn't it just as relevant for experienced purchasers of market research services to brush up on their research-buying skills?

So here goes. Here are some of the things I've always wanted to say to my clients but rarely had the opportunity – or the guts! (I'll bet that there are some fellow vendors reading this who are already salivating!)

When to outsource

First, it needs to be said that it is not always necessary to engage an outside market research supplier. With a little training and experience, there are certain things that you can do yourselves, saving thousands of dollars and hearing things firsthand. For instance, you can learn to conduct your own one-on-one qualitative interviews and, with some of the new authoring tools such as Zoomerang or Survey Monkey, you can even do simple quantitative surveys on your own.

But there are plenty of good reasons or circumstances to outsource to a professional:

Resource constraints. Conducting even as few as 10 to 15 qualitative interviews requires quite a bit of people time. If you and your staff don't have that kind of time, you can always hire it.

The need for confidentiality. In most cases, if you are conducting research yourselves, you'll need to identify your company as the sponsor of the research. In some cases, however, you might want to maintain confidentiality so as not to risk revealing to your competitors the things you are working on. An independent market research vendor does not need to reveal the name of the study sponsor.

The need for expertise that goes beyond your own capability. While you may be able to do the simple things yourselves, many types

of market research require a level of expertise that simply goes beyond what you already have or could easily obtain. For instance, focus group moderating requires a good bit of experience and any kind of quantitative technique beyond simple cross-tabulation usually requires some knowledge of database management, statistics and multivariate techniques.

The need for speed. In almost every case, an outside market research vendor can get the job done faster than you can do it yourself. Why? Because it's what they do – full time, every day – not just one of a dozen or more projects you need to juggle just to keep your head above water.

High-visibility projects. When a particular project takes on high visibility within the company, an outside vendor may simply have more credibility. Even though they might draw the same conclusion as you would had you done the study yourselves, there is certainly something to be said for an outsider's objectivity.

What to outsource

Even if you do decide to conduct market research on your own, there are certain activities that may still make sense to outsource. For instance:

Respondent recruiting. Whether you are using an online database or recruiting people by telephone, this is often a difficult and thankless task. It is very similar to prospecting for a sales organization and it's not for everyone. It requires a certain level of telephone skill and organizational understanding to daisy-chain your way through a company to find just the right type of person.

Off-site market research facilities. Even if you're going to moderate the interviews yourselves, it often makes sense to use a professional market research facility. These are well-equipped for viewing, recording and managing the respondents. They can easily greet them, feed them and handle the honoraria, even if you're doing the interviewing.

Transcription. If you want to have a verbatim transcript of a qualitative interview, be forewarned: do not give this task to one of your own secretaries or administrative assistants. Transcription is a specialized skill that requires specialized equipment. Every city has dozens of transcription services that you can locate either online or in the Yellow Pages. They are typically not all that expensive and can provide a fast turnaround when needed.

Sophisticated quantitative studies. As alluded to earlier, unless you have someone with

just the right skill set and experience, you'll want to outsource these types of studies in almost every situation. Some examples here might be studies having to do with pricing, demand forecasting or causal modeling.

How to work with market research vendors

One of the precepts of market research that I learned very early in my career was not to bother doing a study if you are already sure you know the answer. Human beings have a way of hearing what they want to hear, and if you already think you know, it requires a great deal of intellectual honesty with oneself to hear something different.

First, you'll need to put together a project plan that answers three simple questions: What is it we want to learn? Why do we need to learn it? What will we do with the information if we get?

This sounds elementary, but I am amazed at how often clients don't bother to make these things explicit. This usually results in tremendous scope-creep (i.e., a highly unfocused study that attempts to answer a million different questions but fails to answer any of them particularly well). A smart vendor will help you to crystallize your thinking here, but if you keep changing your mind (which happens far too often), it is maddening for us and hurts the quality of the finished product.

Another thing you'll want to give your vendor is an unambiguous and available point of contact. Sometimes, it is unclear to the vendor who they should be talking to on the client side. This puts us in the uncomfortable position of having to guess about your organizational hierarchy and politics. It is the client's job to work these things out behind the scenes and to clarify them at the start of the engagement. You need to tell your vendor who should be talking to whom and about what kinds of issues.

Often, there are multiple levels on both sides, each with different points of contact. For instance, the vendor's account executive may deal primarily with the project team leader, while the vendor's field director might need to deal primarily with someone in IT who is responsible for generating

a list of customers from which to recruit prospective respondents. Just be clear about how you want it to work.

One other consideration: Choose people who are likely to be available and reachable on short notice. If your primary point of contact is always traveling to Asia or is frequently tied up in all-day meetings, maybe you should assign someone else, or at the very least, have a backup person who can speak for the organization. During the course of a project, things come up that require a quick decision – should we adjust the quotas for the sample design; should we reword a question; should we increase the incentive, etc.? We can't wait until next week to decide some of these things without losing momentum and impacting the schedule!

One other comment is in order here. It is strongly recommended that your primary point of contact avoid defining their role as that of a gatekeeper (i.e., the person who tries to control all of the communication during the project). Early in my career when most of my clients were consumer packaged goods manufacturers, there was a protocol that I detested. Outside market research vendors were told that they could only speak with people in the client's market research organization and that they were never to speak directly to a brand manager without the permission and presence of that market researcher. The logic was that, too often, the brand managers (who had a reputation for being highly aggressive) would try to manipulate the study in order to influence the results.

While I understand the logic of this protocol, it always seemed pretty silly to me. Most outside vendors are smart enough and strong enough to be able to push back and to make sure that nothing is agreed to without the knowledge, participation and agreement of the client's market researcher. And whenever I was called by a brand manager, it was standard practice to call the market researcher the minute that call ended to make sure that they knew what had been discussed.

With today's reliance on e-mail, it's become a lot easier to keep everyone in the loop, so there is less

of a need to control communication. We usually like to err on the side of overcommunicating; that is, we ask our clients to copy our entire project team on virtually every e-mail or other kind of communication and vice versa.

The RFP process

Even companies who are not very experienced with market research usually require a formal request for proposals (RFP) process or some other process for obtaining multiple bids. There are at least three good reasons to do this: to make sure you are getting a fair price; to verify that you are hiring a quality vendor; to obtain assistance with project design.

We vendors hate the RFP process but certainly understand its necessity. Why do we hate it? It goes well beyond the need to "sharpen our pencils" on the price. We all know that even when a client is obligated to obtain competitive bids, they often have a preferred vendor who, deep in their hearts, they would like to hire. Salespeople refer to these as "wired" RFPs. Of course, we never know whether this is the case or not. So, we often put in days of effort preparing a detailed bid and proposal, when there is really almost no chance that we will win the project regardless of our price or the creativity of our design. What often happens is that the client develops a checklist of criteria with the preferred vendor in mind such that they will get a check mark on each and every one of these criteria while almost no one else will. The rest of us all become "column fodder"!

The thing we hate even more, however, is when an RFP is over-specified, with the client specifying the types of questions they want answered and the exact methodology with which they want to do it. In these cases, our role becomes that of a commodity provider, where everyone is required to bid exactly to the specifications. (This is often a clue that the RFP is already wired to a particular vendor.) When you hire a professional outside market research firm, a big part of what you are paying for is the creativity that they bring to the process in how best to go about answering your questions.

Most RFPs will tell you that it is fine to depart from the given specifications but in my experience, if you do, you will usually lose.

Another question that clients need to think about has to do with the sequence of the bidding process. In most cases, the RFP will be sent out to five to 10 possible vendors and perhaps half of them will respond with a proposal. The client then reads through these and selects two or three finalists. The finalists are then invited to come in and present their capabilities and their proposal and then a final decision is made. But I've found that the smartest companies often reverse the process – they invite the five to 10 vendors in to discuss their project before they even write the RFP. Certainly this requires more time on the part of the client. But the advantage is that they get to meet the people, listen to the most creative methodological ideas from all of the vendors and to refine their thinking as they go along. Then, when they do put together the RFP, it is usually a more informed document that allows

for several different approaches to attacking the problem.

What you should expect from a vendor

When you do choose to outsource a project to a professional market research firm, there are a number of things that you should expect and insist upon:

Integrity. Many research industry societies publish standards that their members must agree to. Among these are the Council of American Survey Research Organizations, the Marketing Research Association and ESOMAR. Of course, membership in these organizations doesn't guarantee perfect ethical behavior but it's usually a good sign that they take these things seriously. These standards cover things like avoiding professional respondents, ensuring data integrity and not engaging in shady practices like sugging or "selling under the guise" of market research.

Timeliness. Good market research firms emphasize project management. While there are many legitimate

reasons why a project schedule might slip, good firms deliver when promised most of the time.

Intelligence. If you do hire an outside vendor, there will probably be one or more occasions when you need them to present results to your peers and your upper management. You should expect them to be well-prepared, to have good presentation skills, to handle questions effectively and to speak intelligently during these meetings.

Insight. Almost any market researcher can stand at the front of the room and show you tables or graphs. But that's not enough. In our company, we make it a practice to always ask ourselves "So what?" for every table and every graph. The market researcher's job is to tell you about the numbers and what they mean

What a vendor should expect from you

Of course, this relationship should never be viewed as a one-way street. There are things that a vendor has a right to ask of you, things that make

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the project go smoother and better. These include:

Timeliness. This one goes both ways. While you have a right to expect timeliness from your vendor, there are certain things during the course of a project that require sign-offs from you. For instance, you may need to review materials such as screening questionnaires and discussion guides, not to mention early drafts of the various reports. To keep to an agreed-upon schedule, the client needs to move these things along efficiently.

Flexibility, fairness and realism. During the course of a project, things sometimes don't happen the way that either the client or the vendor expects. For instance, it is pretty standard to overrecruit for qualitative research to allow for the fact that some people don't show up. As an example, if our sampling plan calls for 30 one-on-one interviews, we'll usually recruit about 36. Sometimes more than 30 actually show up, in which case our client gets a little bonus. But sometimes the no-show rate is higher than expected and we're only able to complete, say, 28 interviews. Technically, you have a right to insist on 30 completes. But will the study be lower in quality without those last two people? And conversely, will it be appreciably better with three or four extra respondents? Probably not. And is it worth delaying the schedule in order to get those two extra interviews? Maybe – and maybe not. But it is extremely frustrating to vendors to have to deal with this kind of inflexibility when we know we've given it our best effort.

Clarity. You're the customer and so we try to be responsive to your needs and your requests. But sometimes, in trying to do this, we find that we've misinterpreted what you've asked for. Yes, it's our job to ask questions in order to avoid such ambiguity. But we need the client to be clear and straightforward in voicing their requests.

Asking good questions. Seriously, we like it when you ask hard questions! Not nitpicky questions or gotcha questions but the kind that make us dig deeper and help to improve the quality of the end product. It doesn't

matter whether the question will require five minutes or five hours of additional analysis time, just that it helped all of us stretch our thinking and expand our insights.

How vendors price market research

One thing clients think they do not have a right to ask is how we go about pricing a given study. While it's unfair to ask us to reveal our entire cost structure to you, there's no particular mystery to it and it isn't like we pull it out of thin air. Let me try to explain.

Of course, any professional services company has two primary methods available for how it prices its services. Law firms and consulting firms generally bill on a time-and-expenses basis. They'll give you an estimate but in the end, they keep track of the number of hours spent, multiply them by each individual's billing rate and add in any out-of-pocket expenses (sometimes with a markup). The other option is to quote a fixed price for a given project. Most purchasers of market research insist on the latter.

Some vendors use a hybrid approach, where most of the project is done on a fixed-price basis but with a few types of less predictable expenses billed on a pass-through basis. Examples of this might be travel expenses or respondent incentives. Often, these things are hard to predict in the proposal stage and so they are treated differently. It is also common for research firms to include a "plus or minus 10 percent" clause in their proposals, although many clients refuse to accept them, in which case we ask them to include a cushion in their budget in the unlikely event that we need to invoke this contingency.

How does the research firm go about determining a fixed-price quote? In the same way that they would if they had used the time-and-expenses method. We estimate all of our out-of-pocket expenses for things like rental of a market research facility, respondent recruiting, the use of an online panel, etc. Then we estimate the amount of professional time needed to execute the project, multiply those by our hourly or per diem rates and then quote the total. Billing rates are

a function of salary and level within our organization (e.g., principals, project directors, analysts, etc.). If we execute the job more efficiently than projected, we win. If we execute it less efficiently, we lose. (Truth be told, the latter happens a lot more often than the former!)

There are a few other approaches to project pricing, although they are rare. Fifty years ago, it was standard to simply look at the estimated out-of-pocket expenses and multiply by three. The thought was one-third for out-of-pocket expenses, one-third for labor and one-third for profit. This always seemed pretty naïve to me, since the out-of-pocket expenses were often quite unrelated to the amount of professional time needed. For instance, it's more expensive to do research in New York and Los Angeles than it is in Oklahoma City, even though it takes the same amount of time. And it costs a lot more to recruit doctors than it does people who eat breakfast cereal, even though it takes the same amount of time to analyze the quantitative data you might get from them.

A more sophisticated option is what people call value pricing – basing the price on what you think it will be worth to the client. While in theory this makes a lot of economic sense, it's hard to do for market research projects. Estimating the value of information is a more esoteric exercise than estimating the value of a new piece of manufacturing equipment. Value pricing is one of those things that vendors like to think about in their fantasy world but reality usually dictates that you go with one of the more common methods described above.

Catharsis complete!

There, that feels better! Catharsis complete! In all seriousness, I hope that my insights here will prove helpful to both experienced and inexperienced purchasers of market research services alike. If followed, I'll live longer and you'll get a better end product. 🙏

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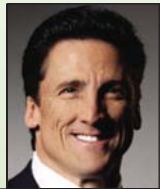
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Leaning on the softer side

Incorporating qualitative into package design research

| By Jerry W. Thomas

snapshot

The author shares some basic ideas and best practices for the use of qualitative research as a component in the package design research plan.

While many quantitative methods are utilized in package design research, sometimes we overlook the importance of the softer side of research – the qualitative techniques. When a new package is to be designed, or an old one redesigned, the process should begin with qualitative research so that the package design work is informed by a better understanding of consumer motivations, knowledge levels and perceptions. Insights into the shopping experience and brand-choice decision process can also influence design decisions. Perhaps we can call this "intelligent design."

Let's take breakfast cereals as our product category and assume that the marketing group for Wheaty Flakes, a fictitious cereal, is interested in a new package design. How could qualitative research be used in the creation and evolution of a new Wheaty Flakes package?

Definitions and explanations

But first, some definitions and explanations to set the stage. While the term "moderator" is most closely associated with focus groups, in this article the term will be used as a generic descriptor for the person conducting a qualitative research project, whether it be focus groups, depth interviews or ethnography. Depth interviews or in-depth interviews (IDIs) are one-on-one interviews lasting 60 to 90 minutes, conducted by a professional moderator. Focus groups are small group discussions of eight to 10 respondents, lead by a professional moderator. Ethnography refers to observational research.

The line between qualitative research and quantitative research is blurry. The two methods share many commonalities and some important differences. We define qualitative research as small-scale (generally fewer than 50 respondents); nondirective and open-ended; limited in structure; exponentially interactive (the questions and probes can vary a million ways, depending on answers to prior questions); ethnographic (observation is



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almost always a part of good qualitative research); non-democratic (better respondents carry more weight than poor respondents, a stark contrast to quantitative surveys where everyone is equal); non-statistical (no percentages or counts); and interpretative (generally searching for deeper motivations, cultural influences, unconscious forces and symbolic meanings). Qualitative is especially useful in revealing the why of consumer behavior.

Dig into the minutiae

While focus groups are the most popular qualitative technique, they are not recommended for packaging research. Much of package research revolves about what the respondent knows, perceives and understands. When one respondent in a focus group blurts out some fact or opinion

about a brand or its package design, the remaining respondents' awareness, knowledge and perceptions are instantly changed. Group dynamics, group pressures and group biases undermine the value of focus groups for most package design research. Also, group discussions do not allow enough time for the moderator to dig into the minutiae of package design.

For packaging research, depth interviews and ethnography are recommended. Both methods avoid most of the bias and contamination inherent in focus groups. Depth interviews provide granularity and great detail (up to 10 times as much information per respondent, compared to a focus group). During the depth interview, a respondent cannot hide behind a mask of silence. A respondent cannot learn from or be influenced by other partici-

pants during the depth interview.

Ethnography is likewise free of bias and contamination. Consumers can be observed shopping, reading labels and interacting with the package – with minimal bias and distortion. During a depth interview, the moderator is also employing ethnographic techniques. That is, the moderator is carefully watching the body language, facial expressions and movements of the respondent.

In-person depth interviews are typically recommended over online depth interviews, but not always. In an in-person depth interview, the moderator can observe how the respondent reacts to, manipulates and interacts with the proposed package and/or package designs. The moderator can observe body language and facial expressions, as well as listen for

nuances of voice, tone and inflection. In touching and handling packages, respondents can sense texture, rigidity and weight – elements missing in online depths. The actual size of the package and design elements is precisely understood in a face-to-face interview, whereas size perceptions can be misjudged online. If respondents are widely dispersed, or time is very limited, online depths can be substituted for in-person.

A tricky issue

Sampling is a tricky issue. If you err in whom you interview, your project may be doomed to fail. Generally, if it's an existing brand, it's best to talk to your core users (you don't want to lose them) and to competitive users that you hope to attract. In general, if you have a high-share brand, it's more important to talk to your core users; if you have a low-share brand, it may be more important to talk to prospective users. If you are developing a totally new package design for a whole new product category, then you will want to talk to concept acceptors primarily, with perhaps a few concept rejecters – just to be safe.

The alignment meeting

Now we're ready to go to work on Wheaty Flakes' package design. The first step is the alignment meeting with the Wheaty Flakes marketing group. What is the marketing strategy for Wheaty Flakes? What role does media advertising play? Will the new package design be supported with media advertising? Who are the primary retail chains that carry the brand? Which brands compete most directly with Wheaty Flakes? Why does the brand group want to change the Wheaty Flakes package? What are the marketing and business objectives of the proposed change? Why does the brand group think a new package design is needed? What core elements of the current design, if any, should be retained? What are the risks? Naturally, the moderator will ask many questions and probe to make sure that s/he understands the goals and constraints of the project and has the information needed to design and execute the project.

Store visits

A good place to start is inside typical retail stores. The moderator should visit 10 to 15 different stores that carry the Wheaty Flakes brand to study the cereal section of the store. What are the characteristics of the retail displays? How much space is devoted to the category? How many facings for each brand? How are brands and types of cereals organized? How are prices displayed?

As the moderator spends time in the cereals aisle, s/he can observe patterns of shopping behavior. How long do shoppers take to examine the cereal display and make a choice? How many different packages do consumers look at? How many do they pick up? Do consumers look at the side panels, back panel, nutritional information and pricing information? How much time elapses before a choice is made? Do consumers buy one box or multiple cereal boxes of one brand or multiple brands? What are the characteristics of the shoppers themselves?

The information gleaned from retail observation will stimulate questions and probes later on in the depth interviews and will aid in interpreting the answers.

The depth interview

Assuming an in-person interview, the moderator begins with some small talk to help relax the respondent. The moderator then explains the interview process and reveals the presence of observers behind the mirror, reassuring the participant that they are harmless. So long as the moderator is nonchalant about the observers, respondents tend to accept their presence and soon forget about them.

The first set of questions typically focuses on the participant's background, where s/he grew up, education, family situation, employment and hobbies. People generally like to talk about themselves so these background questions help relax the respondent and help create a bond of trust between moderator and participant.

The next set of questions revolves around usage of the product category. How often and in what ways

are breakfast cereals used and at what times of day or night? Then the moderator begins asking about specific brands and how often each was consumed. When and for what purpose is each brand used? How are the brands used similar? How are these brands different? The questions and probes are designed to uncover category motives and, more importantly, the specific brand perceptions and brand-choice motivations.

The moderator asks the respondent to think back to recent shopping trips and to recall everything s/he can remember about how s/he shops the category and how s/he buys. These answers are cross-checked against the observational data in the moderator's mind and probed accordingly. The respondent is asked about the packages and packaging elements of the brands s/he used. The moderator notes the colors, patterns, designs, illustrations, claims or images that were recalled for each package with some emphasis on the Wheaty Flakes brand – but not so much as to reveal the research's sponsor. Depending on time available, the respondent might be asked to quickly draw or paint these package designs from memory, using colored markers. The goal of these questions and exercises is to identify any iconic package elements that consumers rely on for brand identification.

The new package design is then



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shown via a prototype, along with three or four competitive packages. This line of questioning revolves around which package designs are most eye-catching; which do the best job projecting desired product attributes; which arouse the greatest purchase interest and so forth. The moderator asks many follow-up questions and probes, striving to understand the package design elements that drive consumers' preferences and perceptions so that prescriptions for design improvement can be offered.

The last questions involve a panel-by-panel review of the text and design elements for the new Wheaty Flakes package design with the moderator searching for places in the package copy and art elements where respondent comprehension breaks down; some type of miscommunication occurs; or vital information is missing. The moderator explores with the respondent how to rephrase or rewrite any confusing copy or omissions so that communication is absolutely clear. The moderator's objective is to ensure that the new

package design achieves the brand's communication and design goals.

Multiple package designs


Very often, multiple new package designs are taken into qualitative exploration. The greater the number of new designs, the less time the moderator can spend on each. Some of the questioning topics must be eliminated as the number of designs increases. When the number of designs reaches five or more, the questions about shopping habits, buying motivations and design-element recall might have to be abbreviated or eliminated. It's best to restrict the number of designs to five or fewer.

Only the beginning

Qualitative research is only the beginning. Two or three sets of depth interviews may be required, especially if the number of new designs is large. Regardless of the number of depth interviews, the final testing should be quantitative, based on 200 to 300 completed interviews per new design, with major competitive brands' packages as the control in some type of simulated

retail display. Where the risks of a new package design are great (i.e., an established high-share brand), it is always wise to distribute the new package in a limited geographic area until the new design proves its mettle. It is also wise to explore the possibility of using media advertising to introduce the new package and reduce downside risks.

A tall order

Package design research is much more important now than it was 30 years ago, since the great majority of brands now receive relatively little media advertising support. In many instances, the retail package is the advertising campaign. The retail package must attract attention, tell the brand's story and evoke positive purchase interest in a few seconds – at the point of purchase. It's a tall order. And it's the reason companies need to seriously consider qualitative research in the early stages of package design or redesign. 

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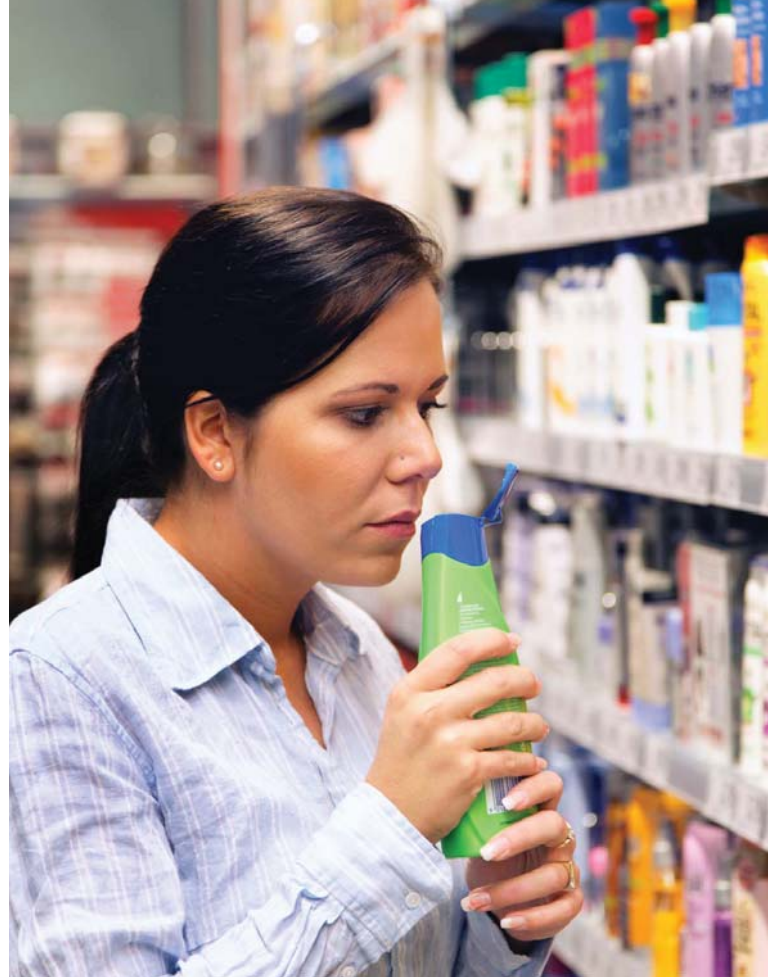
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Transcending brand and loyalty

Rethinking the customer experience

| By Danica R. Allen

snapshot

In part one of a two-part article, Danica Allen presents a new approach to viewing the consumer experience and its relationship to customer satisfaction.

Over the past two decades there have been few paradigmatic changes in the world of customer satisfaction research. We seek to remedy this situation through the introduction of a new, broader construct that subsumes many elements of both customer satisfaction and brand measurement research. Historically, customer satisfaction research has focused on measuring service and product quality and relating these to attitudinal outcomes such as overall satisfaction and loyalty or more recently, economic outcomes such as market share and profitability. Similarly, brand research has generally been oriented toward capturing consumer perceptions of brand imagery or performance and relating these to psychometric or econometric measures of brand equity and, ultimately, purchase behavior.

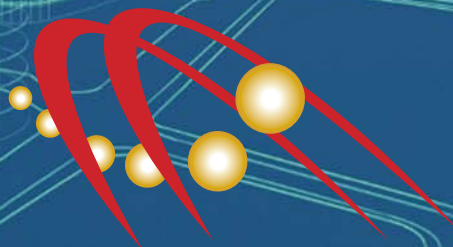
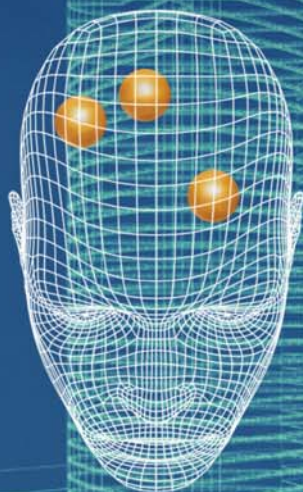
Efforts to innovate around these two constructs have generally focused on new psychometric outcome measures. In particular, the last major advancement in the customer satisfaction arena involved the introduction of loyalty. This was initially formulated as a three-item index but later was afforded greater complexity as a consensus grew around the notion that loyalty subsumed both rational and emotional components. Underlying the shift toward loyalty measurement was the intuitively palatable notion that even satisfied customers depart. Similarly, in the brand research arena much effort has been expended on refining or enhancing dependent measures under the guise of brand equity, brand attachment or brand vitality. A robust economic measure of brand equity remains elusive.

We turned to consumer experience as a construct to bridge the chasm between brand and loyalty research. It was preceded, however, by an industry-wide obsession with differentiating loyalty from customer satisfaction. Reichheld and Sasser (1990) and later Reichheld (1996) produced compelling work that essentially set the stage for a paradigmatic shift toward consumer experience. Interest in this field became especially keen in the late 1990s with the publication of Pine and Gilmore's 1998 article "Welcome to the Experience Economy."



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Pine and Gilmore (1998) argued that from a macroeconomic perspective, the economic offering of firms has progressed from commodities to goods and from goods to services. They argued that from this progression has emerged the experience economy wherein the economic function is not to extract fungibles, make tangibles or deliver service but instead to stage experiences. The nature of the offering is memorable. The seller is the stager and the buyer, the guest. The demand factor in the experience economy is the memorable sensation.

Despite the compelling nature of this framework and more recent epiphanies such as that reflected in the *Adweek* excerpt below, there were no substantive efforts to produce a commercially viable, comprehensive system for measuring, tracking and ultimately manipulating the characteristics of a consumer experience. The modal treatment of consumer experience during the last 10 years focused on its sensorial aspects (see for example Lindstrom [2005] and Michelli [2007]).

"Whatever the methodology, it's increasingly clear that customers desperately want goods and services, communications and marketing campaigns that dazzle their senses, touch their hearts and stimulate their minds – delivering a positive experience they will remember. Businesses will live or die not by the attributes they promise but by the brand experiences and value they offer customers at every touchpoint."

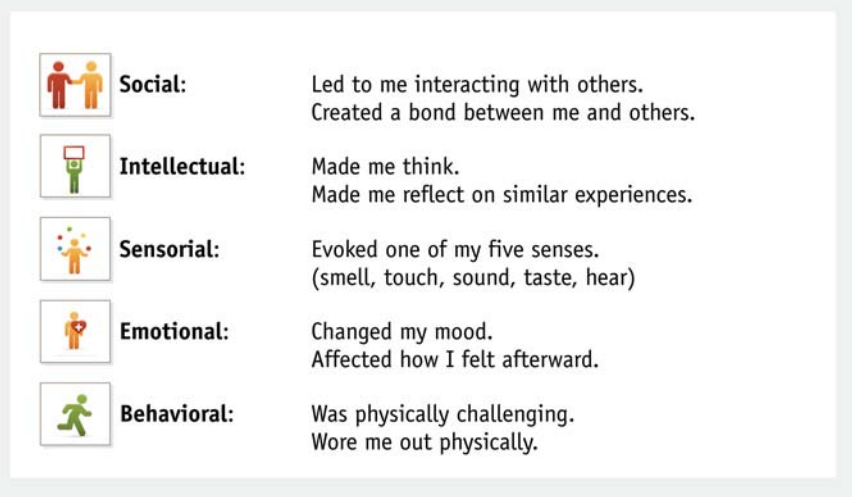
Adweek, September 29, 2008

Mind modularity

A unique aspect of GfK's ConEx system is its integration of a concept developed by evolutionary psychologists: mind modularity. Although controversial in the early 1920s when suggested by Dewey (1922, 1925) and even more so in 1997 when championed by Harvard University's Steven Pinker in *How the Mind Works*, the notion that the human mind has evolved in a Darwinian fashion, yielding five distinct modules to facilitate humans' interactions with their environment, has gained wide acceptance.

Our interest in the application of mind modularity and brands was piqued by treatments of the subject

Figure 1: Five Experience Dimension Icons



spanning about 10 years: Brakus (2001); Schmitt (2008, 2003); and Brakus, Schmitt and Zarantonello (2009). The five experiential dimensions that represent the foundation upon which these authors developed a brand-oriented architecture were based largely upon Pinker's (1997) work. Their programmatic efforts, which spanned essentially the first decade of this century, continually confirmed Pinker's five dimensions: sensorial, social, behavioral, cognitive and emotional.

Each dimension clearly measures a different nuance and each is also presumed to be important depending on the idiosyncratic appeal of a given experience. For example, brands such as Starbucks would certainly find the sensorial dimension critical to the experience it offers. The extent to which an experience should emphasize behavioral characteristics may also differ. Harley-Davidson's core experiential value proposition is clearly more oriented to the behavioral, sensorial and emotional dimensions.

A more in-depth treatment of the Brakus et al research is beyond the scope of this article. Suffice it to say that in addition to Pinker's five-dimension architecture, these authors' programmatic research represents the theoretical and empirical foundation upon which we have built a highly flexible, modular system for measuring and tracking consumer experience.

Transcend the boundaries

This study is based on a series of R&D projects spanning two years. The

objective was to develop a system that could transcend the somewhat artificial boundaries that delineate the domains of brand and loyalty research. The common currency involves the five experiential dimensions described above. If the five dimensions are the common currency for transcending brand and loyalty, then experience touchpoints (XPs) represent a common language. In this research, we differentiate between vicarious and direct XPs. The former include television ads, billboards, magazines, Web sites and so on. In contrast, direct XPs involve substantive involvement with a product or service. These XPs tend to be the domain of loyalty research. The distinction between vicarious and direct XPs can be leveraged to change the focus of the measurement system described in this article. It is important to note that distinguishing between them is unnecessary and is done so here to illustrate the ability of this research to transcend both brand and loyalty research.

Our research was driven by the notion that any experience can be characterized in terms of the five dimensions introduced by Pinker and later adopted by Brakus et al. In order to make the dimensions more consumer-friendly, we translated the original labels into talk, think, sense, feel and act and paired them with graphic icons as represented in Figure 1.

Large sample sizes

This study spanned five business sectors. Within each sector we measured five brands and within each brand,

Table 1: Five Sectors, Each with Eight XPs

Sector	Direct XPs	Vicarious XPs
Banking	Visit the Web site Visit branch office Visit ATM Interact with loan advisor	TV advertising Print advertising Internet advertising Friends' recommendation
Automotive	Visit showroom/dealer Test drive Driven before Seen on street	TV advertising Print advertising Internet advertising Friends' recommendation
Laptop	Tried at store Used at friend's house Use at job Interacted with salesperson	TV advertising Print advertising Internet advertising Friends' recommendation
QSR Restaurant	Visit the Web site Eat in the restaurant Placed an order at counter Used rest room	TV advertising Print advertising Internet advertising Friends' recommendation
Shampoo	Use it at home Handling the package Receive free sample Purchase at store	TV advertising Print advertising Internet advertising Friends' recommendation

eight XPs. This structure demands large sample sizes. Indeed, in total the design subsumes 200 unique sector/brand/XP cells. In order to achieve n = 200 within each cell, a total of 40,000 observations would be necessary. Time and economic limitations precluded such a large-scale effort and instead, we opted to select the top five brands within each sector based on market share.

Experience touchpoints play an important part in this architecture; they represent a common language for both loyalty and brand research. As noted earlier, we selected eight XPs for each sector. Vicarious XPs are the same for each sector. The four direct XPs differed based on the idiosyncratic nature of each sector. The XPs for each sector are presented in Table 1. The system described in this research is highly flexible; the XP set may be focused on more direct XPs and therefore be of greater utility to managers interested in enhancing the consumer experience. In contrast, if more emphasis is placed on vicarious XPs, the results will likely have more utility to brand managers and advertising researchers.

Data relating to each of the five experiential dimensions were collected using an innovative technique. We were hesitant to utilize Likert

scales for each of the five experiential dimensions since a memorability and impression (valence) rating was needed. Lengthy batteries of Likert scale items become tedious very quickly and our fear was that straightlining and disengagement would ameliorate the relationships we sought to reveal.

In order to capture impression and memorability ratings for each of the five experiential dimensions (Talk, Think, Feel, Sense, Act) we embraced a novel approach. This involved a quadrant similar to that depicted in Figure 2. Clearly, in order to complete this task, respondents needed substantive briefing with respect to the five exper-

ience icons and the two axes. The five icons were illustrated with a series of photographs and descriptions. The two quadrant axes were described using a series of examples that illustrated how an experience could be highly memorable due to its positive or negative nature. They were also shown how, regardless of quality, experiences could be highly forgettable.

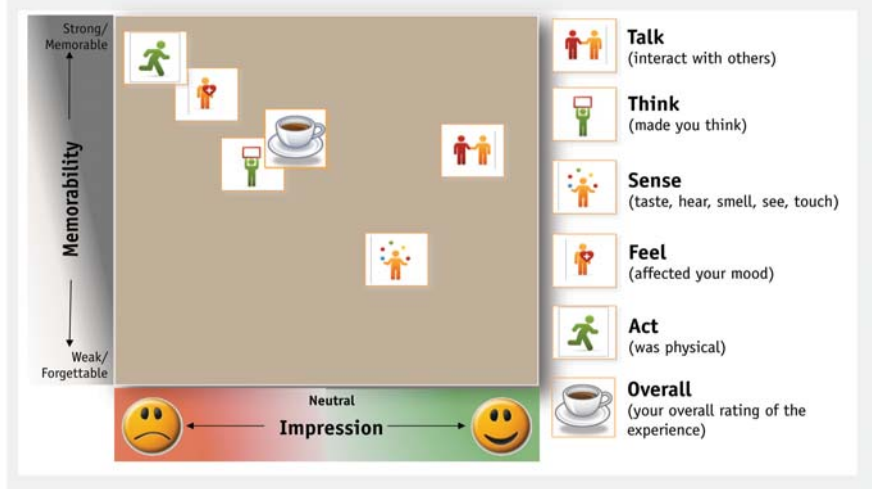
Following the introductions to the icons and quadrant dimensions, respondents were shown an illustration of how a person might place the five experience icons and an overall touchpoint icon with respect to waiting in line to place an order in an upscale coffee shop. In this exercise, respondents were shown how to drag each icon into the quadrant space and place it based on both impression and memorability. After all six icons were placed in this training exercise, a respondent's efforts would yield the final illustrative result presented in Figure 3. By placing the six icons into the quadrant space a respondent creates 12 scores since each icon has a unique x/y position.

As described earlier, this research project subsumed five sectors. Within each sector five brands and eight XPs were of interest. Respondents were routed into two sectors depending upon screening and within each, asked to rate two XPs in terms of the five experiential dimensions described earlier. Thus, any respondent could complete at most four quadrant exercises in which the five experience icons and a single dependent touchpoint metric were dragged and

Figure 2: Quadrant Data Collection Illustration



Figure 3: Quadrant Data Collection Coffee Shop Illustration with Icons Placed



dropped into the impression–memorability quadrant.

In total, we collected 3,000 completed interviews using GfK’s online consumer panel. On average, respondents completed 2.7 quadrant exercises each. This yielded a total of 8,145 completed quadrants. The resultant dataset provided rich depth and breadth for analysis both within and across sectors.

The two 85-point quadrant axes yielded distributions with more desirable characteristics than similarly administered seven-point Likert scales¹. Figures 4 and 5 present the x-axis and y-axis distributions for the five sectors aggregated over all brands and touchpoints. Clearly, the data presented in the figures cannot reveal the nuanced differences that more granular brand or XP-level treatment would have allowed. Unfortunately, space constraints precluded treatment of the brands within each sector and this will be described in part two of this article, which will appear in next month’s *Quirk’s Marketing Research Review*.

Very appealing distributions

The quadrant data collection mechanism yielded very appealing distributions. Clearly, the x-axis distributions differed substantively from the y-axis distributions. Recall that the former reflected impression and the y-axis represented memorability (ranging from weak/forgettable to strong/memorable). One aspect of the quadrant data collection mechanism that remains untested

is the possibility that respondents utilize vertical and horizontal spaces differentially. Thus, we concede at this point that had the axes been reversed, it is possible the distributions would reflect this.

Figure 4 presents the x-axis (impression) distributions for the five sectors. Within each distribution, the data are aggregated across five brands and eight XPs. A comprehensive treatment of the data would necessitate 40 distributions for each of the five sectors. Part one of this article is aimed at familiarizing the reader with the common currency and language of consumer experience research.

The data presented in Figure 4 exhibit some interesting patterns despite the aggregation by brand and XP. If we examine the data in a row-wise fashion and begin with the top tier (Talk) there are some noteworthy differences. The automotive data, for example, yielded many more positive icon placements. To a certain extent, the computer data distribution appears to resemble the automotive data. In the next row are the x-axis distributions of the Think icon. As shown, the automotive and banking sectors resulted in the most positive icon placements and the shampoo category the fewest. The shampoo category emerged as essentially the inverse of these with a high proportion of respondents placing the Think icon on the far left of the quadrant.

The third row of Figure 4 presents the x-axis placements of the Sense icon. In this case we see the automotive, food and shampoo

category distributions yielding the most positive placements. The Feel icon distributions are presented in the fourth row of Figure 4 and suggest a stronger emotional component associated with the automotive and especially computer sectors. Finally, the Act icon distributions suggest that the automotive and computer categories left the most positive (valence) impressions.

Figure 5 presents the y-axis (Memorability) experience distributions. Recall that the anchors of this axis were strong/memorable and weak/forgettable. Again, a row-wise approach to examining the table will help us understand cross-sector differences. With respect to the Talk icon distributions we see that only the automotive sector data were associated with a significant number of positive (i.e., positioned high on the y-axis) icon placements.

The second row of Figure 5 shows the Think icon distributions. As shown, the automotive and computer sectors had the most memorable icon placements and as expected, the shampoo category Think icon was typically placed at the bottom of the y-axis, indicating its rather forgettable nature. The placement of the Sense icon illustrates several intuitively appealing patterns. For example, both the food and shampoo sectors enjoyed many icon placements at the top of the quadrant, indicating strong memorability. In contrast, the bank sector was associated with the most forgettable sensorial ratings.

The Feel icon, which represents the emotional impact of an experience, elicited the most positive placements within the automotive sector and fewest in the bank category. Interestingly, there was a significant group of respondents who placed the Feel icon in the highest vertical position for the computer segment. Finally, the Act icon y-axis distributions are presented in the fifth row of the figure. These clearly show that the behavioral dimension was very memorable in the automotive sector; this left skew is also reflected in the computer sector and is noteworthy. The remaining sectors yielded bi-modal distributions since many respondents placed the icon very high

Figure 4: Impression (x-axis) Distributions by Sector

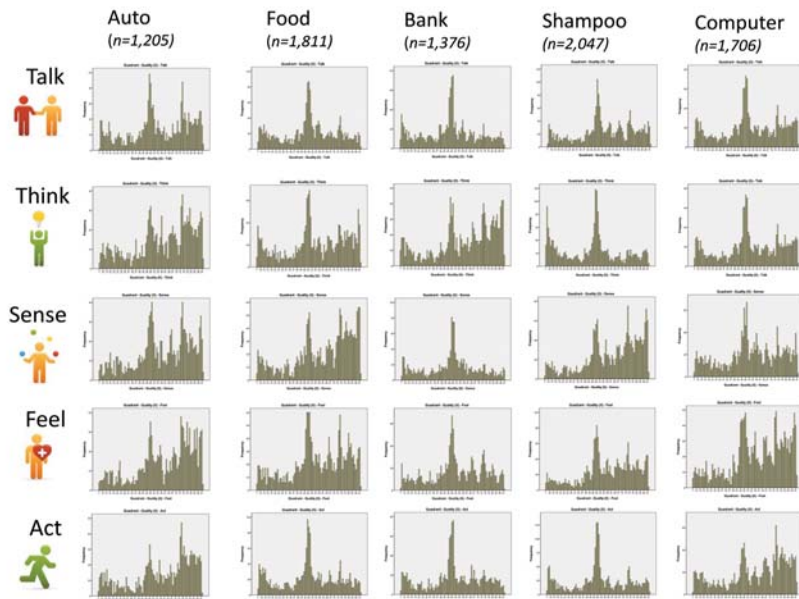
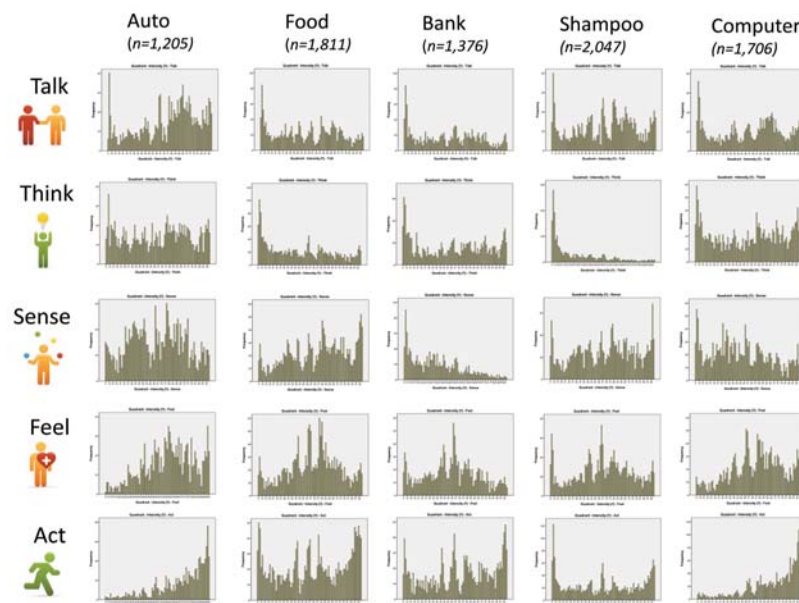


Figure 5: Memorability (y-axis) Distributions by Sector



or very low in the quadrant space.

The distributions in Figures 4 and 5 demonstrate interesting differences across the sectors and across the five experiential dimensions. For example, a column-wise review of Figure 4 reveals substantive stability with respect to the x-axis placement of the five icons. However, a parallel examination of Figure 5 suggests considerably more differentiation across the five experiential dimensions (Talk, Think, Sense, Feel, Act). That is, with respect to vertical axis placement

within each sector there were strikingly different distributions for each icon, suggesting that the memorability of touchpoint exposure may be a critical dimension that until now, has not received much attention.

Our analytic efforts have unequivocally confirmed that traditional linear techniques yield anemic models when we attempt to relate the five experience icons to the single XP outcome measure icon. In next month's issue we will provide a deep dive into the unique as-

pects of the quadrant data and some approaches to driver analysis within a two-dimensional space. Our focus will be on one sector and illustrate the richness of these data by examining both brand and XP dynamics. ¹

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FOOTNOTE

¹ Note that a parallel study was undertaken wherein the two axes were administered as seven-point Likert scales and that these data were determined to be inferior to the quadrants with respect to factor structure, dependence models and distributional criteria including skewness and kurtosis. A comprehensive psychometric comparison of the two approaches will be the subject of a forthcoming paper.

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●●● online/qualitative research

Promising but not perfect

Lessons to keep in mind when interviewing via Webcam

| By Michael Carlon

snapshot

An early user of online qualitative tools offers his tips on conducting Webcam-based studies.

In July 2011, Facebook announced a partnership with Skype enabling the social networking giant's 750 million users to communicate with each other face-to-face. While Facebook and other social media tools have been enabling people to stay in touch via quick (and impersonal) status updates and wall postings, the move to integrate a video-calling feature underscores the market demand for more interpersonal forms of communication from the online world. This is good news for those of us who have been championing the use of desktop-based videoconferencing for qualitative research.

In the mid-1990s, I was working for an online agency pioneering the use of online qualitative tools including online focus groups (OLFGs). The promises of OLFGs were appealing: people from a wide number of markets could participate in a session; clients could save money, given there was no need to

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travel or rent a room in a facility; and moderators could explore highly sensitive topics as the computer screen provided a wall of anonymity for participants.

Failed to take off

Though these benefits are indeed present in OLFs, the method failed to take off and hindsight provides a variety of reasons for the market's lack of engagement:

- When looking for insights, what participants say is only part of the story we moderators look for. Equally important is how they say it. Both inflection in tone and body language (i.e., the context of communication) are key ingredients to any insight recipe. Unfortunately, these were trade-offs made in early iterations of online focus groups.

- Invariably, some participants are better at typing than others and this results in a suboptimal interview flow (oftentimes

I was in the middle of the second section of my guide

when some people were just answering

questions from the first section).

- Finally, unlike in traditional qualitative groups, online participants don't wait for others to respond before offering their answers to a question; everyone responds at (or around) the same time. As such, moderators are challenged to read a burst of responses and respond with meaningful probes to each individual participant. This actually limits the ability to probe, thereby eliminating one key characteristic of qualitative research.

Much different

The world is a much different place in 2012 than it was in 1996. Broadband penetration is the rule not the exception. People in general are extremely comfortable using their computers to video chat with friends, family and colleagues. As such, online focus groups have been reinvented.

Today's online focus group uses Webcams to connect participants and a moderator. Voice data often goes over a phone line to reduce demands on bandwidth, making the videoconference experience much more fluid.

The video-based online focus group marries the benefits of traditional qualitative research and the promised benefits of online focus groups:

- Moderators can see and hear participants, meaning that there is greater context to a participant's responses and probing is not compromised.
- Participants can log in from any part of the country (or the world, for that matter), thus eliminating the need for the moderator or clients to travel to a limited number of markets.
- Built-in collaboration tools enable the moderator to show multiple forms of stimuli (concepts, advertisements, images, etc.) to the group.

Some situations more ideal

We have used online Webcam focus groups for a variety of industries including financial services, pharmaceutical and CPG. That said, some project situations are more ideal for the Webcam approach. These include:

Physician interviewing. When interviewing doctors, an online interview using a Webcam means you can talk to doctors from all over the country vs. from one or two markets. It also means that they can participate from their office and not have to take as much time away from their patients (no need to drive to/from a facility).

Low-incidence populations. Traditional in-person qualitative research can be challenging when looking for low-incidence populations (e.g., people who suffer from a specif-

ic medical condition). Since Webcam interviews happen online, geography is removed as a barrier, making the recruit less complicated.

Recruiting from a client list.

Many times when asked to recruit from a client list for in-person qualitative research, we can burn through the list quickly, requiring our client to pull more names. Removing geography from the equation means recruiting from a client-supplied list can become more efficient.

Interviewing Millennials. Online communication is quickly becoming the preferred method of communication amongst Millennials. For this reason interviewing them through a Webcam is just as natural as having a conversation with them in person.

Words of advice

After two years of experimenting and implementing video-based focus groups, I have some words of advice to share with anyone who is interested in using them for a project.

Recruiting. We have used both online recruiters and traditional phone-based recruiters for video focus group projects. We have had more success in the forms of show rates and respondent quality with traditional recruiters and hypothesize the reason for this is twofold: when a recruit commits to an actual person over the phone, they are more committed to showing up; and a recruit's articulation cannot be assessed through an online screener.

Screening questions. You will need to add a few questions to the screener in order to qualify someone for a Webcam-enabled interview: a question to evaluate a recruit's comfort level participating in a Webcam-based interview (strong comfort required); a question around broadband access on the computer they will use for the interview (broadband access required); a question around personal comfort using a computer and the Internet (you would be surprised at how often respondents rely on someone else in the household to help them use a computer); and a question around Webcam ownership. (Note, not owning a Webcam does not have to lead to a terminate in the screener. In the past, we have offered to send

one to otherwise-qualified recruits provided they indicate they are comfortable receiving and installing it themselves.)

Technology providers. Many focus group facilities now offer the ability to license Webcam focus group software. The benefit to this for most moderators is that all of the hassles around technology are taken care of, namely sending instructions to participants and troubleshooting should something go wrong. That said, the fees that many of these providers charge can make presenting a cost-savings benefit to your clients difficult. In some cost exercises we have conducted, the cost to run a project online actually was greater than the cost to run it offline. As such, if you are tech-savvy you can consider purchasing a year-by-year license from Adobe (most, if not all Webcam focus group providers are using the Adobe Connect platform). Investing your time in learning the ins and outs of Adobe's product can lead to significant cost savings down the road.

Running the interview. Running

a Webcam-based interview is slightly different from running an in-person group interview. The primary difference is that when you are in person, you can use your own body language to indicate which participant should start answering a question as well as encourage engagement. Online, this is not possible as each participant sees the same view of the moderator. When running an online group interview, I tend to have to call on participants to avoid a free-for-all. This takes some getting used to but it becomes more natural over time.

Group size. When we run Webcam-based group interviews, we tend not to sit more than five participants, for two primary reasons. First, five participants plus a moderator leads to six boxes on the screen and from an aesthetics point of view, it is easier on the eye to see an even number of boxes than an odd number. Second, if group energy is not actively managed, participants may become disengaged. The more participants there are in a session, the longer the time between responses from any

one participant. As such, we tend to keep our online groups smaller than offline groups, where energy is easier to manage.

Note-taking. I do feel as if managing the energy of an online session is a bit more challenging than an in-person session. As a result, I prefer to spend more time listening and looking at my screen to make sure everyone remains engaged than I do taking notes. As such, I do advise hiring a note-taker or transcriptionist to capture the conversation as it unfolds.

Don't eliminate the need

Importantly, in our view, Webcam focus groups don't eliminate the need for traditional in-person methods. Rather, we view them simply as another tool for listening to consumers when it feels like the project would benefit from the use of this method. ①

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Names of Note

■ **Dana Stanley** has joined Seattle research software firm *Survey Analytics* as vice president, marketing.



Stanley

■ Framingham, Mass., research company *Kadence International* has hired **Gurpinder Sidhu** as associate director at its U.K. headquarters. Also in the U.K., Kadence has named **Eimear Macgarty** and **Margaret Allen** insight executive;



Sidhu

Tomasz Sondej senior insight executive; **George Tsakraklides** insight manager; and **Andy Grout** and **Neil Rees** insight director.

■ *Koski Research Inc.*, San Francisco, has hired **John Gilfeather** as executive vice president. Gilfeather will be based in Stamford, Conn.

■ Cincinnati research company *Burke, Inc.* has promoted **Stacy McWhorter** to senior vice president, client services.



McWhorter

■ *GfK Custom Research North*

America, New York, has hired **Rogério Monteiro** as managing director, GfK

Business and Technology.

■ **Mark Anton** has joined Wilton, Conn., research company *Marketing Management Analytics* as senior vice president, strategic accounts.



Anton

■ *The Marketing Workshop Inc.*, a Norcross, Ga., research company, has hired **James Colvin** as marketing science analyst and **Tatyana Bacon** as research manager.



Bacon

■ **Luc Durand** has been named president of *Ipsos in Quebec*, a Montreal research company.

■ Hong Kong research company *Instar* has appointed **Amy Chai** to lead business development in Asia.

■ **Diane Lauridsen** has joined *Murphy Marketing Research/Trendtown*, Milwaukee, as vice president, client services. Lauridsen will be based in Chicago.

■ Minneapolis research company *Ideas To Go Inc.* has made the following appointments to its leadership team: **Ed Harrington** as principal and chairman; **Beth Storz** as president; **Adam Hansen** as vice president, innovation; **Christine Haskins** as vice president, customer experience; and **Susan Robertson** as vice president, business development.

■ **Tom Kerber** has been appointed to lead Dallas research company *Parks*

Associates' home systems and energy management research practice.



Bhalla

■ **Gaurav Bhalla** has been named chief innovation office of Los Angeles social communities company *Passenger*. Research will be among his responsibilities.

■ **Sarah Chumsky** has been named vice president, insight kids, of *Insight Research Group*, New York.



Chumsky

■ *MarketVision Research*, Cincinnati, has hired **Diane Hesse** as a moderator. Additionally, MarketVision has promoted **Lauren Arnos** to senior research associate, marketing sciences; and **Amanda Kerns** and **Martha Broda** to senior research associate, client services.



Arnos

■ Cincinnati research company *dunnhumbyUSA* has promoted **David Suchanek**, **Heather Thibodeau** and **Robert Marlow** to director; **Jay Ford** to associate director; **Kristen Hill** to senior associate; **Dan Romer** and **Kathy Grigg** to vice president, client solutions;



Broda

Miska Spaulding to vice president, communications and media; **Allen Zink** to vice president, global learning and development; and **Gavin Gilchrist** to vice president, customer insight.

■ Leeds, U.K., research company *Nunwood* has promoted **Jill Sarsfield** to account director; **Debbie Wykes** and **Anna-Lena Bock** to senior client consultant; and **Rachel Stern** to insight manager. The company has also hired **Vicky Smith** and **Scott Owens** as insight manager; **Sarah Newton** as client consultant; and **Camille Damsleth** as junior analyst.

■ **Tim Edbrooke** has been appointed president and CEO of Horsham, Pa., research company *Healogix*.

■ *Ipsos OTX MediaCT*, a Los Angeles research company, has promoted **Ben Spergel** to senior vice president, television insights.

■ New York research company *TNS* has named **Maureen Duffy** CEO in the U.K.

■ **Jonathan Gibs** has joined *NBCUniversal*, New York, as senior vice president, digital research, entertainment and digital networks and integrated media.

■ London research company *Relish* has promoted **Simon Thompson** to managing partner.

■ **Tamara Deprez** has been named general manager at *Saliency*, a Dubai, United Arab Emirates, research agency.

■ Horsham, Pa., research company *ImpactRx* has hired **David Gascoigne** as executive vice president, consulting analytics.

■ New York research company *Sociocast* has hired **Scott Hoffman** as COO. Additionally, **Joe Doran** and **Jeffrey Silverman** have joined the company's advisory board.

■ *Insight Research Group*, London, has promoted **Jon Simons** to director.


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Research Industry News

News notes

■ In November 2011, Vinod Gupta, founder and former CEO of Omaha, Neb., research company **Infogroup Inc.**, filed a countersuit against Infogroup's suit that charged Gupta with stealing confidential information to help grow his Database for.com venture, also in Omaha. In the filing in the Douglas County District Court, Database said its business is substantially different from Infogroup's, although it competes for some of the same customers. Database also said Infogroup employees spread false, damaging information about Database and its products to customers and Infogroup hired a key engineer away from Database and "compelled" him to provide secret information about Database's operations. The suit said company officials suspect Infogroup employees of attacking its computers. Database asked the court for unspecified damages.

■ Consumer and privacy organizations **Center for Digital Democracy**, **Consumer Action**, **Consumer Watchdog** and **The Praxis Project** filed a complaint with the **Federal Trade Commission**, Washington, D.C., in October 2011, calling on the agency to investigate and bring an action against **PepsiCo** and its subsidiary **Frito-Lay** for "engaging in deceptive and unfair digital marketing practices in violation of Section 5 of the FTC Act." The complaint focuses on a series of Frito-Lay's online marketing campaigns that target teens through a variety of stealth interactive marketing and data collection techniques involving social media, immersive multimedia content, mobile phones and gaming platforms. The

complaint cites materials from PepsiCo's advertising partners to provide detailed documentation of the company's strategies and tactics for targeting teens online to increase sales of its Doritos brand.

■ **The Council of American Survey Research Organizations**, Port Jefferson, N.Y., has released its Social Media Research Guidelines, which provide an ethical framework for research performed within the unique forums and behavior systems and the associated varied privacy expectations of the social media space.

■ Research companies **All Global**, London; **M3 USA**, Washington, D.C.; and **Medefield**, New York, have formed the **Trust Alliance**, a collaboration that seeks to advance industry standards, develop and promote best practices and foster trust in online physician research. Trust Alliance will address inherent challenges in online research through a number of discrete programs and initiatives, including authenticity, transparency and data integrity.

Acquisitions/transactions

■ Englewood, Colo., business information company **IHS Inc.** has acquired **Purvin & Gertz Inc.**, a Houston market research company.

■ New York research company **TNS** has acquired all remaining shares in **Orodek Badania Opinii Publicznej (TNS OBOP)**, a Warsaw, Poland, research company. This acquisition takes TNS' stake in TNS OBOP from 60 percent to 100 percent.

■ McLean, Va., research company **Clearspring** has acquired **XGraph Inc.**, a New York data science company. Clearspring will absorb XGraph's audience technology to create a multigraph platform on the open Web, mapping users' connections by brand affiliation, intent and social behavior.

■ Milwaukee research company **Market Probe** has acquired **Richard Day Research Inc.**, Evanston, Ill.

■ Oxford, U.K., business consultancy **LMC Automotive** has acquired the automotive forecasting division from Westlake Village, Calif., research company **J.D. Power and Associates**.

Alliances/strategic partnerships

■ Reston, Va., research company **comScore Inc.** and Taipei, Taiwan, digital measurement company **InsightXplorer** have formed an exclusive third-party reseller alliance to bring comScore's products and services to the Taiwan market.

Awards/rankings

■ **The Marketing Research Council of the American Marketing Association**, New York, has named **Amanda Durkee** of Zanthus; **Martijn van Kesteren** of Unilever Benelux; **Pravin Shekar** of Krea; and **Orlando Wood** of BrainJuicer Labs as recipients of the second annual 4 Under 40 Marketing Research Emerging Leaders Award. The award recognizes the contributions of the next generation of leaders in the marketing research industry.

■ Columbia, Md., research company **Arbitron Inc.** has recognized **Beatriz R. Perez**, chief sustainability officer of the Coca-Cola Company, Atlanta, as its 2011 Arbitron Multicultural Marketing Honoree. Perez was selected for her commitment to multicultural marketing and for supporting radio as an effective means of reaching America's diverse audiences.

■ **Kristin Luck**, president of Fresno, Calif., research company **Decipher Inc.**, has been named as an Executive of the Year in Best in Biz Awards, a national business awards program judged by members of the press and industry analysts. Luck was honored for the leadership and direction she has provided in bringing market research technology solutions to market for her company.

Additionally, **Decipher Inc.** and Chicago research company **InContext Solutions** were both named to the 2011 Lead411 Tech 200 list by **Lead411**, a Palos Verdes Estates, Calif., business data and information company. Companies were selected and ranked based on revenue percentage growth from 2008 to 2010. Applicants had to be a privately-held business in the United States and have earned more than \$1 million in the past year.

■ New York research company **WorldOne's** Lithuania operation has been named Language Ambassador of Europe 2011 by the British Council in Lithuania and European Union National Institutes of Culture in Brussels, Belgium, in partnership with the British Chamber of Commerce, London. The award honors WorldOne Lithuania as a business enterprise that shows good policy of language learning and usage.

■ **PepsiCo**, Purchase, N.Y., and Portsmouth, N.H., research company **Sentient Decision Science Inc.** were named recipients of the EXPLOR Award, which recognizes breakthrough innovation in technology as applied to market research. The EXPLOR Award was presented at The Market Research Event (TMRE) in November 2011 and was founded by Encino, Calif., research company uSamp.

Also at TMRE, Stamford, Conn., research company **InsightExpress** received the 2011 Next Gen Market Research Disruptive Innovation Award for Most Innovative Deployment of a Research Concept for its development of the Ignite Network, a panel-based data analytics and research platform.

Finally, New York research company Ipsos Loyalty's **Tim Keiningham** and **Alex Buoye**; Fordham University professor **Lerzan Aksoy**; and Vanderbilt University professor **Bruce Cooil** received the 2011 Next Gen Market Research Disruptive Innovation Award for developing the Wallet Allocation Rule, a research tool designed to help businesses better map out their share of consumer spending.

New accounts/projects

■ **JIC STIR**, an Amsterdam, Netherlands, Internet audience measurement company, has selected research companies

Intomart GfK, Hilversum, Netherlands, and **comScore Inc.**, Reston, Va., as the online media measurement currency in the Netherlands through 2014.

■ New Orleans research company **Federated Sample** has adopted San Francisco research company **MarketTools Inc.'s** TrueSample data quality solution for its Fulcrum project management platform.

■ European airline **Alitalia** has selected Oslo, Norway, research software company **Confirmit's** Horizons offering to create a customer panel for online customer experience surveys.

■ **Kantar Video**, a New York division of Fairfield, Conn., research company Kantar Group, has announced four new preferred partners for its Videolytics video analytics platform: **Panache**, **Tube Mogul**, **Vindico** and **Kaltura**.

■ **The Pew Research Center's Project for Excellence in Journalism**, Washington, D.C., has selected Boston research company **Crimson Hexagon's** ForSight platform.

■ London research company **Effective Research** has adopted the Kinesis Survey platform from **Kinesis Survey Technologies LLC**, Austin, Texas.

New companies/new divisions/relocations/expansions

■ Boston research company **Crimson Hexagon** has relocated its headquarters to offices Boston's Seaport District.

■ California research company **Crowd Science** has relocated its Mountain View headquarters to Technology Drive in San Jose.

■ New York research company **Millward Brown** has opened an office in Munich, Germany. Anna Plöckl will lead the operation.

■ Boston research technology company **Jana** has opened an office in Singapore.

■ The Center for Economic Studies at the **U.S. Census Bureau**, Washington D.C., in partnership with the **Federal Reserve Bank of Atlanta**; **Georgia State University**; the **Centers for Disease Control and Prevention**; **Emory**

University; the **Georgia Institute of Technology**; the **University of Georgia**; and the **University of Alabama at Birmingham**, has opened a research data center laboratory in Atlanta. The center is located at the Federal Reserve Bank of Atlanta.

Research company earnings/financial news

■ **Rentrak Corporation**, Portland, Ore., announced financial results for the second fiscal quarter ended September 30, 2011. Consolidated revenues were \$21.9 million, compared with \$24.1 million for second-quarter 2010.

■ **IPerceptions Inc.**, Montreal, reported financial results for third-quarter 2011. Third-quarter revenue was \$1.4 million, an increase of 16 percent over the same period in 2010, excluding the effect of foreign exchange. Operating loss was \$(53,526) in the quarter, a 54 percent improvement over 2010.

■ **National Research Corporation**, Lincoln, Neb., announced results for the third quarter of 2011. Net new sales were \$4.9 million and revenue rose 16 percent to \$18.5 million. Net income increased 24 percent to \$2.6 million.

■ **Ipsos**, Paris, reported financial results for the first nine months of 2011. Revenues totaled 845.8 million euros, an increase of 4.1 percent over the previous-year period. Organic growth rose 6 percent. In the third quarter alone, Ipsos' revenues totaled 287.6 million euros, up 1.4 percent over 2010. Revenues rose by 5.4 percent at constant scope and exchange rates, compared with 6.2 percent in the first quarter and 6.4 percent in the second.

■ **The Nielsen Company**, New York, reported third-quarter 2011 results. Revenues for the third quarter increased 10 percent to \$1,413 million over third-quarter 2010.

■ Kadence Singapore, a division of **Kadence International**, Framingham, Mass., reported a year-over-year revenue increase of 33 percent for its July-to-September 2011 period.

■ **The GfK Group**, Nuremberg, Germany, reported earnings for the first nine months of 2011. GfK increased sales by 7.1 percent to 999 million euros.

CALENDAR OF EVENTS

●●● can't-miss activities

Worldwide Business Research will hold its social commerce strategies conference, focused on monetizing social engagement, on **January 24-26** at the Red Rock Resort in **Las Vegas**. For more information visit www.socialcommerce2012.com.

Marcus Evans will host a conference, themed "Consumer Insights in New Product Design and Delivery: Capturing Deep Insights to Promote a Consumer Centric Innovation Process," on **January 31-February 1** in **Miami**. For more information visit www.marcusevans.com.

The Marketing Research Association will hold its annual CEO summit on **February 27-29** at the Fairmont Turnberry Isle in **Miami**. For more information visit www.mra-net.org.

The International Quality and Productivity Center will hold its U.S. Hispanic Marketing Summit on **February 27-29** in **Miami**. For more information visit www.ushispanicmarketingsummit.com.

Worldwide Business Research will hold its flagship conference, "eTail Palm Springs," on **February 27-March 1** at the JW Marriott Desert Springs in **Palm Desert, Calif.** For more information visit www.etailwest.com.

The Council of American Survey Research Organizations will hold its annual online research conference on **March 1-2** at Encore at Wynn in **Las Vegas**. For more information visit www.casro.org.

The International Quality and

Productivity Center will hold its Marketing 360 Exchange West conference on **March 4-6** in **San Francisco**. For more information visit www.marketing360westexchange.com.

The University of Texas at Arlington (UTA) will hold its annual conference for alumni of its Master of Science in Marketing Research program, themed "Innovation in Marketing Research," on **March 9** at UTA.

SymphonyIRI will hold its annual summit on **March 19-21** at the ARIA Resort and Casino City Center in **Las Vegas**. For more information visit www.sigsummit.com.

Sawtooth Software will hold its annual research conference on **March 21-23** at Disney's Boardwalk Hotel in **Orlando, Fla.** For more information visit www.sawtoothsoftware.com.

The Pharmaceutical Marketing Research Group will hold its annual national conference, themed "Rev Up Your Innovation Engine," on **March 25-27** at JW Grande Lakes in **Orlando, Fla.** For more information visit www.pmrg.org.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on **March 26-28** at the **New York** Marriott Marquis in Times Square. For more information visit www.thearf.org.

Worldwide Business Research will hold a conference, themed "Next Generation Customer Experience," on **March 26-28** in

Green Valley Ranch, **Las Vegas**. For more information visit www.the-customer.com.

Worldwide Business Research will hold its spring mobile shopping conference on **April 1** at the Westin in **San Diego**. For more information visit www.mobileshoppingspring.com.

ESOMAR will hold its annual Asia-Pacific conference, themed "Asia Kaleidoscope," on **April 15-17** in **Shanghai, China**. For more information visit www.esomar.org/apac.

The American Marketing Association will hold its annual applied research methods conference on **April 16-18** at The Cosmopolitan in **Las Vegas**. To register and for an early registration discount visit www.marketingpower.com/Calendar/Pages/2012_Applied_Research_Methods.aspx.

Globalpark will hold a conference, themed "Market Research in the Mobile World," on **April 18-19** at the Dorint Amsterdam-Airport in **Amsterdam, the Netherlands**. For more information visit www.mrmw.net.

The Council of American Survey Research Organizations will hold its annual global research conference on **April 18-19** at the Hyatt Regency in **Miami**. For more information visit www.casro.org.

The International Quality and Productivity Center will hold a conference, themed "Shared Service Exchange Latin America," on **April 22-24** in **Miami**. For more informa-

tion visit www.sharedserviceslatamexchange.com.

The Alliance of International Market Research Institutes will hold a conference, themed "The Power of Social Media Research on the International Landscape," on **April 27** in **New York**. For more information visit www.aimri.net.

IIR will hold a conference focused on technology in market research on **April 31-May 2** at The Cosmopolitan in **Las Vegas**. For more information visit www.iirusa.com/tdmr.

ESOMAR will hold its annual Latin America conference on **May 13-15** in **Mexico City**. For more information visit www.esomar.org/latam.

The Council of American Survey Research Organizations will hold its annual technology conference on **May 30-31** at the Millennium Broadway Hotel in **New York**. For more information visit www.casro.org.

The Council of American Survey Research Organizations will hold a management conference on **June 13-14** at the Wyndham in **Chicago**. For more information visit www.casro.org.

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



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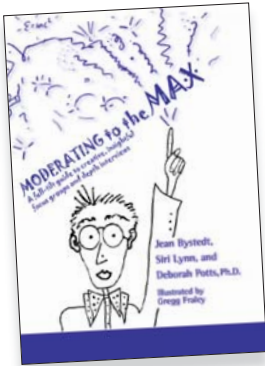
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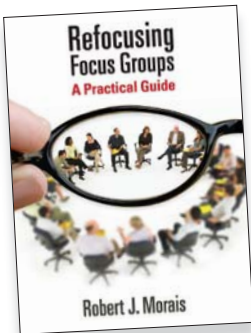
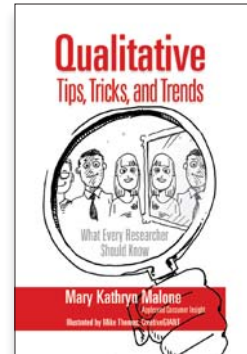
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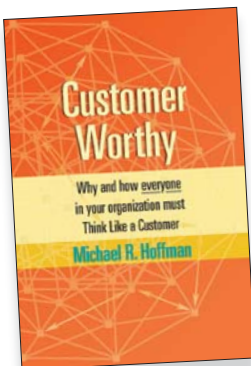
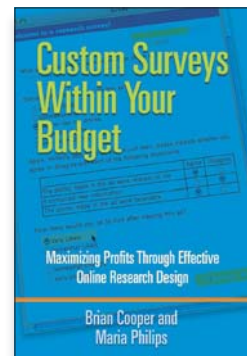
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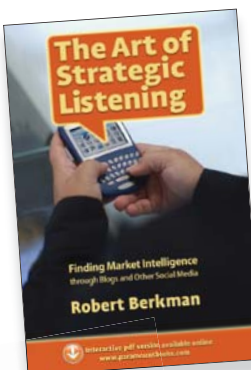
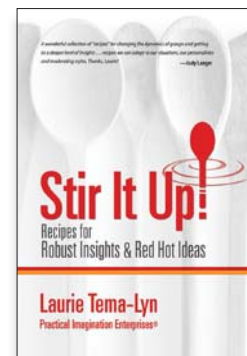
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BEFORE YOU GO ••• issue highlights and parting words

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We make it a practice to always ask ourselves "So what?" for every table and graph.

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You would be surprised at how often respondents rely on someone else to help them use a computer.



Quirk's launches the first market research directory apps

Can you believe it's been a year since we launched the digital app for Quirk's magazine? To follow up that success, Quirk's has launched two additional mobile apps. The Quirk's Focus Group Facilities app allows you to locate and contact focus group facilities worldwide. The SourceBook app gives you access to our complete database of 7,000 marketing research companies. So whatever your marketing research information need, Quirk's has an app for you. Best of all, the apps are completely free of charge! Check out the Android Marketplace and search for "Quirk's" to download your app or visit Quirks.com.



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Congratulations to November's winners Jeri Fields of Fruit of the Loom, Bowling Green, Ky., and Bruce Lockwood of Portland Research, Portland, Maine. November's prize was a set of three qualitative research books from Paramount Publishing.

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