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Marketing Research

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2012 Research Software Directory

February 2012
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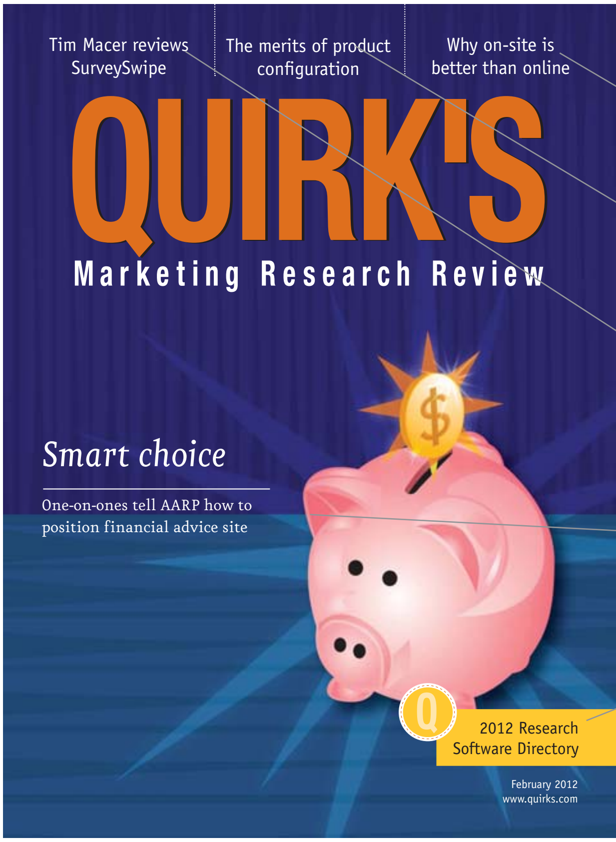
February 2012 • Vol. XXVI No. 2



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••• consumer psychology

Paying with plastic makes consumers feel falsely flush

It's a basic checkout question: Cash or credit? But did you know that answering one way or another could impact your bottom line? Research from Promothesh Chatterjee, assistant professor of marketing at the University of Kansas, Lawrence, Kan., lends credibility to the notion that consumers assess purchases differently depending on payment method.

People who reach first for a credit card concentrate on benefits of the purchased item, such as the improved image from a new television or the comfortable texture of new clothes. Shoppers who pay with cash are more likely to focus on the item's cost, including warranty costs, installation fees and delivery time.

Studies Chatterjee carried out with colleague Randall Rose of the University of South Carolina, Columbia, S.C., were designed to explore whether consumer perception of products was altered by form of payment. Their study is scheduled to be published in the *Journal of Consumer Research* this year.

Previous marketing research demonstrated consumers were willing to pay more when they used credit cards rather than cash. In a series of four experiments involving more than 500 participants, Rose and Chatterjee found that consumers who had been primed to think first of a credit card as the payment mechanism made more recall errors regarding aspects of a product's cost than they did when recalling benefits of the items.

Chatterjee said their research suggests consumer education programs may need to address marketers' steady reinforcement of credit cards as a payment option because the method likely compels people to purchase goods and services not appropriately aligned with actual needs. In addition, the study could have implications for government welfare agencies that distribute payments on prepaid debit cards.

••• mobile research

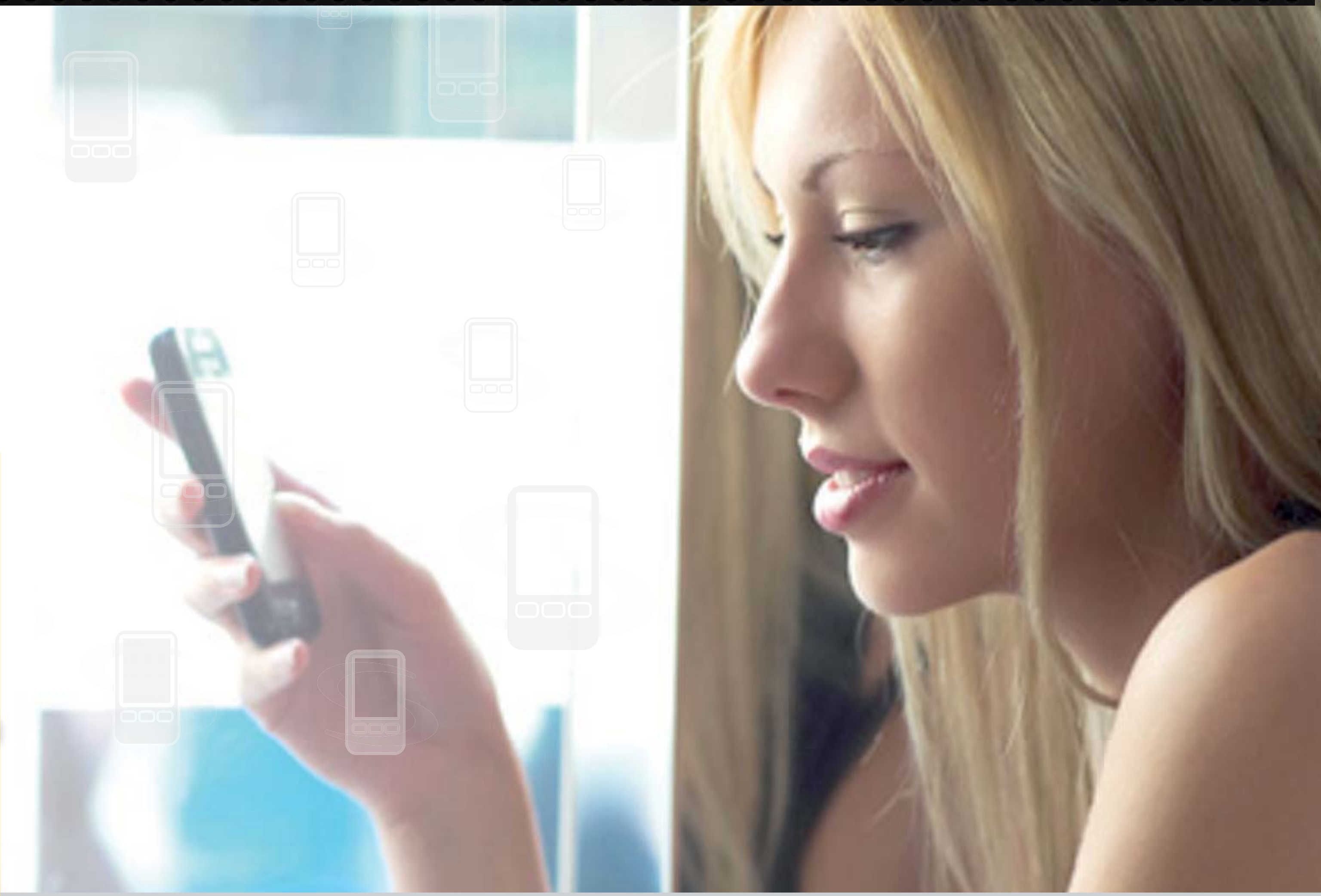
QR codes lost on even the savviest

You might think that if anyone would know how to use a QR code, it would be college students, but data from Lincoln, Neb., research company Archrival showed that although 80 percent of students owned a smartphone and had previously seen a QR code, only 21 percent of students were able to successfully scan the QR code example. Furthermore, about 75 percent said they were unlikely to scan a QR code in the future.

Why the discrepancy? "Students simply struggled with the process," said Don Aguirre, brand manager at Archrival. "Some didn't know a third-party app was needed [to scan the QR code]. Many mistakenly assumed it could be activated with their camera. And others just lost interest, saying the activity took too long."

In her December 9, 2011, article "Why QR codes aren't catching on," for CNN.com, Amy Gahran argues that there are several flaws with the QR system, beginning with needing a smartphone with a barcode scanner app installed. Once properly equipped, consumers must then be willing to take a moment to find and launch that app before pointing the smartphone's camera at a QR code.

Even then, it's a gamble whether the landing page will be useful, interesting, relevant or even mobile-optimized, as some QR codes have been known to spread malware and phishing scams.



By Joseph Rydholm, Quirk's Editor

Using the past to improve the future

©Clare Pix Photography www.clarepix.com

Joe Rydholm can be reached at joe@quirks.com

These early weeks of a new year are the most common time to engage in a little reflection. It seems especially appropriate, then, to have just finished *The Future of Looking Back*, Richard Banks' meditation on how we capture and store memories of our lives, loved ones and personal experiences.

Aimed at designers of systems for storing photos or other artifacts of consumers' daily lives, the book is part of a series generated by Microsoft Research Cambridge, one of Microsoft's worldwide collection of labs devoted to exploring the impact of technology.

At the close of each chapter, Banks poses questions to those designers as a way to get them thinking big-picture thoughts on the issues he raises. As a compulsive saver of family and personal memorabilia, I was initially drawn to the book's ostensible topics but as I went along, I started applying his questions to the act of storing and cataloguing research results.

Banks talks early in the book about looking through his recently departed grandfather's collection of photographs and cites the value of the notes that his grandfather had written on the back of a snapshot of him with his fellow RAF squadron members. As Banks observes, certainly his grandfather knew all of his squadronmates' names, so the words were clearly meant to help the image be less mysterious to those viewing it in his absence.

When you're done with a research project and are committing it to your corporate or organizational repository (insert joke about gathering dust here, if you must), do you give thought to who may be accessing the information in the coming months and years?

What about the people reading your research findings in your absence? What kind of context do you add to your reports? Will the next batch of insight-seekers have all the background information they need to really get the most from the data?

When we're in the thick of a project, with all of the nuances and mini-crises and averted disasters fresh in our minds, we forget that future consumers of our record of that project won't have our wealth of knowledge. Will they still get the benefit of the full richness of the data? What steps can you take to put your projects in their deepest context?

Physical vs. digital

Banks also explores the nature of the physical vs. the digital storage of information and what each means. For example, compare the impact and experience of leafing through a musty old box of family photos to swiping though digital snapshots on your iPad. Both actions certainly have their pluses and minuses but, to put things in a research scenario, could the form in which you are archiving your study data change its impact on those who experience it? Is it better to capture those focus group transcripts as words on a page (digital or paper!) or, instead, as a series of short videos?

Beyond the topic of archiving data, the book's later chapters, in which Banks looks at how we preserve physical spaces and at new ideas for how we use technology to chronicle our daily activities, also raise interesting questions when read through a marketing researcher's prism. How might we apply new technologies to enhance a consumer's experience of the research process, eliciting helpful insights by transporting them to a more relaxed, more open place? What would a repository of our tweets, blog posts and Flickr'ed photos tell a curious marketer?

At 160 or so pages, the book is a quick read. And while it's perhaps a bit far afield from the usual marketing or° research text, for the right reader it may spark some stimulating discussions and serve as further proof that inspiration can often come from new and unexpected places. Q

The Future of Looking Back (160 pages; $24.99), by Richard Banks, is published by Microsoft Press.

quirks.com/articles ID 20120201

IN FOCUS

••• a digest of survey findings and new tools for researchers

// Survey Monitor

••• pharma research

Pesky no more

Pharma sales reps find favor worldwide among physicians

A whopping 93.8 percent of physicians worldwide find sales representative calls useful and of value to their practice, according to Paris research company Cegedim Strategic Data (CSD). This 93.8 percent includes 33.3 percent who find rep calls very useful and of value and 60.5 percent who find them somewhat useful and of value. The remaining 6.2 percent represents those physicians who find visits from reps not at all useful or of value to their practice.

CSD selected 11 pharmaceutical markets (France, Germany, Italy, Spain, U.K., Brazil, Russia, India, China, U.S. and Japan) and analyzed their results, focusing on the extreme scores.

Physicians in Russia and Brazil showed a keen interest in rep calls, with the highest "very useful and of value" score at 47.7 percent and 46 percent, respectively. For Russian physicians there seems to be no question of the legitimacy of rep interaction, with only 0.4 percent considering the rep call not at all useful.

Japanese physicians seemed the least convinced, with the lowest "very useful" score of 17.1 percent. Nevertheless, 75.1 percent of Japanese physicians still find rep calls somewhat useful.

Two of the main European markets, France and Italy, showed the highest scores for "not at all useful or of value" at 15.4 and 9.3 percent, respectively. However, overall usefulness (very useful and somewhat useful) in these two countries remains high, with France at 84.6 percent and Italy at 90.7 percent.

Although the general trend in the U.S. is sales force-level reductions, rep calls are still considered influential by U.S. physicians, with 97.9 percent finding them useful. Of that number, 44 percent see them as very useful and only 2.1 percent of U.S. physicians find visits from sales representatives not at all useful.

Overall, the study does not show distinct differences between the more mature and emerging markets, despite the current scaling up of sales force and marketing investments in the emerging pharmaceutical markets. For example China's results show 31.2 percent "very useful," 63.4 percent "somewhat useful" and 5.5 percent "not at all useful."
www.cegedimstrategicdata.com

••• millennials research

Talk to me, not at me

Social media is for communication, not shopping

Millennials may be the tech-savviest generation yet, spending more time surfing the Web and on social media than they do watching TV, listening to radio or reading newspapers but they still use and value traditional media, according to Ypulse, a New York research company. In fact, when students were shopping for back-to-school items, they most preferred to hear about deals or specials via regular mail, e-mail, TV and newspaper ads rather than via Facebook pages or ads, text alerts or Twitter messages.

The primary function of social media is communication, not shopping, which means Millennials aren't necessarily going on such sites to look for ads to aid in their purchase decisions. Still, they expect brands to be on social media. Two-thirds say a brand being on social media shows it cares about their generation and 56 percent think social media is a great way to find out what's new with brands they like. That may be why 64 percent have Liked a brand on Facebook, following an average of 10 brands or companies.

"Students clearly use social media to connect with brands but they don't want to be bombarded by sales and deal information," says Melanie Shreffler, Ypulse editor-in-chief.

Minor adjustments, such as phrasing an ad as a conversation instead of an announcement, make a big difference in how they are received. But brands can also talk to Millennials too much. The most common reasons Millennials decide to stop following brands online are the brand sends too many messages (59 percent); stopped liking the brand or store (14 percent); wanted their social network to be more personal/for friends (12 percent); and not enough sales or promotion offers (10 percent).

www.ypulse.com

••• social media research

This privacy policy passes

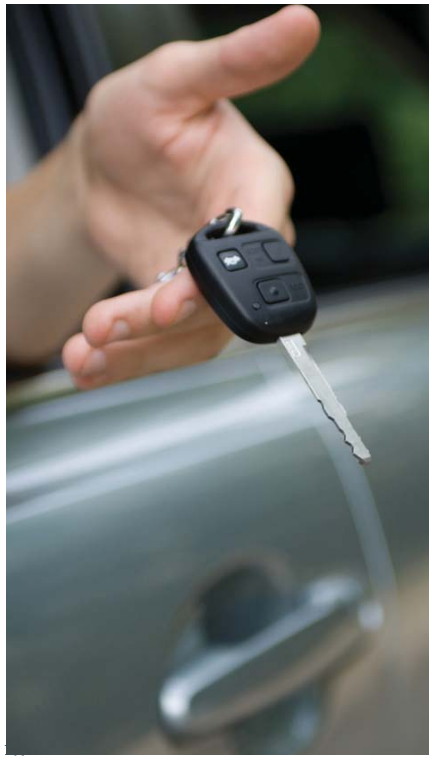
Most Facebook users comfortable with personal information shared online

Security of personal information on the Internet has been an ongoing concern, especially for social networking sites. Atlanta research company Poll Position conducted a telephone study among Facebook users, asking if they are comfortable with the personal information they provide on the site. A full 70 percent said they were comfortable with personal information they give out. Twenty-three percent were not comfortable with the information provided on Facebook and 7 percent had no opinion.

Young people were far more comfortable than older people. Among 18-to-29-year-olds, 81 percent of Facebook users said they were OK with the personal information they provide on Facebook, while 19 percent were not. Of Facebook users in the 65-and-older category, just 50 percent felt comfortable with personal information provided, 27 percent did not and 23 percent had no opinion.

Women felt more comfortable than men, with 74 percent of women saying it was OK, versus 63 percent of men who said they felt comfortable with the personal info they provide on Facebook.

www.pollposition



••• auto research

Taking their time

New-vehicle buyers pleased with lengthier, more informative sales process

Satisfaction with the new-vehicle sales process has improved notably from 2010, despite an 11-minutes-longer sales process, according to Westlake Village, Calif., research company J.D. Power and Associates' 2011 U.S. Sales Satisfaction Index Study. Overall sales satisfaction averaged 648 on a 1,000-point scale in 2011, an improvement of 13 points over 2010. This gain suggests that, as market conditions improve, automotive manufacturers and dealers are placing renewed focus on and investment in providing buyers with satisfying retail experiences.

The study is a comprehensive analysis of the new-vehicle purchase experience and measures customer satisfaction with the selling dealer (satisfaction among buyers). It also measures satisfaction with brands and dealerships that were shopped but ultimately rejected in favor of the selling brand and dealership (satisfaction among rejecters).

Among buyers, satisfaction is examined across four measures (listed in order of importance): working out the deal (17 percent); salesperson (13 percent); delivery process (11 percent); and dealership facility (10 percent). Among rejecters, satisfaction is examined across five measures: salesperson (20 percent); fairness of price (12 percent); facility (6 percent); inventory (6 percent); and experience negotiating (5 percent).

All measures improved notably over 2010, with the greatest gain in the delivery process, despite the fact that the average length of time to complete the delivery portion of a new-vehicle sale increased by four minutes to an average of 32 minutes in 2011, from an average of 28 minutes in 2010. Overall, the average length of time a buyer spends at the dealership has increased by 11 minutes, to 4.3 hours in 2011 from 4.1 hours in 2010.

A primary reason for the lengthened delivery process is the increasing proportion of buyers who are receiving more in-depth demonstrations of technology in their new vehicle (including audio, entertainment, navigation and communications systems). Approximately 88 percent of buyers in 2011 said they received a technology demonstration at vehicle delivery.

"Although technology demonstrations add time to the delivery process, those explanations substantially improve satisfaction, as well as customer loyalty and advocacy," says Jim Gaz, director, automotive research, J.D. Power and Associates. "It would intuitively seem that buyers are most satisfied when the sales process is completed in the shortest amount of time possible. However, buyers actually appreciate it when sales staff spends additional time with them, as long as that time provides them with added value."

Lexus ranked highest among luxury brands in satisfaction with the new-vehicle buying experience, followed by Cadillac and Mercedes-Benz. The luxury brands with the greatest improvement from 2010 are Lincoln (moving from ninth rank position to sixth) and Audi (moving from 11th to ninth).

MINI ranked highest among mass-market brands for a second consecutive year, followed by Buick and GMC. The mass-market brands with the greatest improvement from 2010 were Volkswagen (moving from 13th rank position to fourth), Scion (moving from 11th to fifth) and Nissan (moving from 18th to 12th).
www.jdpower.com

••• restaurant research

Local business? Get the 'Net

Internet leads the pack of info sources on local companies

Consumers looking for information about local restaurants and other businesses say they rely on the Internet, especially search engines, ahead of any other source, according to Pew Research Center's Project

for Excellence in Journalism and Internet and American Life Project, Washington, D.C. However, newspapers, both printed copies and the Web sites of newspaper companies, run second behind the Internet as the source that people rely on for news and information about local businesses, including restaurants and bars. Word of mouth, particularly among non-Internet users, is also an important source of information.

Some 55 percent of adults say they seek news and information about local restaurants, bars and clubs. When searching, here are the sources they say they rely on most: 51 percent turn to the Internet, including search engines (38 percent), specialty Web sites (17 percent) and social media (3 percent); 31 percent rely on newspapers, including printed copies (26 percent) and newspaper Web sites (5 percent); 23 percent rely on word-of-mouth; and 8 percent rely on local TV, either broadcasts or Web sites.

Sixty percent of adults say they seek news and information about local businesses other than restaurants and bars. When they do, 47 percent say they rely most on the Internet, including search engines (36 percent), specialty Web sites (16 percent) and social media (1 percent); 30 percent rely most on newspapers, including printed newspapers (29 percent) and newspaper Web sites (2 percent); 22 percent rely on word-of-mouth from family and friends; 8 percent rely on local TV, either broadcasts or the Web sites of local stations; and 5 percent rely on local radio.

The 55 percent of adults who get information about restaurants, bars and clubs are more likely to be women, young adults, urban and technology adopters. The 60 percent of adults who get information about other local businesses are also more likely to be tech users. Those who get information about local businesses that are not tied to eating or socializing are a diverse and somewhat upscale group and are more likely to have college or advanced degrees, live in relatively high-earning households, use the Internet and own cell phones. They are not distinct by gender or race and ethnicity.

Additionally, Pew asked people if they got local news and information on their cell phones and 47 percent of all adults said they did. Those mobile consumers were also more likely than others to get material about local businesses, as 65 percent of mobile local news consumers got information about local businesses, compared with 55 percent of others.
www.pewinternet.com

••• consumer research

Profiles of culinary prowess

Younger homemakers rate their cooking skills higher than do older peers

When U.S. homemakers assess their own cooking skills from fair to excellent, age and years of cooking experience don't necessarily translate into a higher skill level. Sixty percent of homemakers ages 25-34 and 57 percent of homemakers ages 35-44 rated their cooking skills as very good compared to 50 percent of homemakers ages 45-54 and 65+ who also rated their skills at that level, according to the Kitchen Audit 2011 from Port Washington, N.Y., research company The NPD Group.

Only a small percentage of homemakers, across all age groups, rated their cooking skills as excellent. The highest percentage of homemakers (16 percent) rating their skills as excellent was in the 55-64 age group, and the lowest percentage (10 percent) was in the 25-34 age group.

Additionally, four in 10 homemakers/respondents use a recipe once a week or more to make any kind of dish and a cookbook owned for more than two years is the top recipe source. One percent of respondents use a recipe from a mobile phone app once every two-to-six months.
www.npd.com

Q

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Product and Service Update

••• statistical analysis

Maritz Stats via the cloud

New mobile software for statistical analysis

Maritz Research, St. Louis, has launched an updated version of Maritz Stats, its free statistical software. Maritz Stats 3.0 is designed to allow users to run statistical tests such as z-, t- and chi-square tests, as well as precision and other analysis staples from any Web-enabled device. Instead of Windows-based software, Maritz Stats 3.0 users will have the option of downloading the application or accessing it from an Internet-ready device via the cloud.

Also, in addition the common tests found in a full statistics program, Maritz Stats 3.0 offers the following tests and functions: t-test to compare two mean scores; z-test to compare two percentages; precision to compute sample size needed for given confidence intervals; paired comparisons test, which is a z-test for preference analysis; McNemar test to compare nominal, dichotomous proportions; power to calculate sample size needed for statistical testing; and chi-square test to determine whether sample data differ significantly from those expected.
www.maritzresearch.com/insights/maritz-stats.aspx

••• audience research

Who's digging your display?

Camera-driven audience analysis simplifies facial recognition

Rhonda Software, Vladivostok, Russia, has introduced myAudience-Measure, an automated way to measure ad impact and audience appeal of trade show displays, product displays or kiosk advertising. This computer vision solution uses a USB camera and an Internet-connected PC to track the visitors attracted to a particular display ad or static product display. The software then translates those images into demographically-stratified data about which audience is most sensitive to a particular product or advertising.

Marketers mount the USB camera frontally next to the display advertising or a static retail product display, facing the visitors who view the object of interest. When a visitor in the camera's field of view pays attention to a display, myAudience-Measure detects the person's age group and gender and the amount of time s/he looks directly at the object of interest. The data is then compiled in Rhonda Software's Web Reports Portal, where the user can log in and see raw data, build diagrams, analyze audience characteristics and activity in dependencies and acquire customized marketing reports.

MyAudience-Measure aims to provide audience statistics without the need to save personal visual data, neither recording nor transferring any images.
www.myaudience.com

••• social media research

Two tools, one goal

Companies buddy up to improve social marketing insight

Reston, Va., research company comScore Inc. and New York software company Buddy Media have partnered to help brands and agencies measure and maximize the value of their social marketing programs. The partnership is designed to allow mutual clients using the Buddy Media social marketing suite and comScore Social Essentials measurement service to optimize social communications via owned media and quantify the impact of the earned media using social media metrics, such as reach/frequency, demographics, online behavior and benchmarking of competitive brands in the social landscape.

As part of the partnership, the companies have agreed to integrate comScore data into the Buddy Media product suite and workflow.
www.comscore.com

••• ad research

AdInsights takes to tablets

Measuring the brand impact of tablet ad campaigns

Stamford, Conn., research company InsightExpress has launched Tablet AdInsights, an ad effectiveness solution designed to measure the brand impact of campaigns running across tablet devices against metrics such as awareness, message association, favorability, consideration and intent.

Tablet AdInsights recruits respondents directly from their device while surfing the Internet. Using the

AdInsights test/control methodology, InsightExpress recruits the control group (unexposed) prior to the campaign and any potential exposure. Once a campaign launches, respondents for the test group (exposed) are randomly recruited.
www.insightexpress.com

••• ad research

What's your mobile ad potential?

Ipsos debuts approach to test effectiveness of mobile communications

New York research company Ipsos ASI|digital has developed a mobile testing platform that aims to help advertisers optimize brand communications on mobile devices, including the ability to test the potential of mobile assets to directly impact offline sales and measure how the ad is contributing to brand equity and brand closeness. This capability is also designed to measure how well a brand's mobile communications fit within the overall campaign strategy.
www.ipsos-na.com

••• panel research

Linking attitude and purchase behavior

Researchers partner to launch U.S. consumer panel

Research companies Millward Brown, New York, and Kantar Shopcom, Wilton, Conn., have partnered to create a single-source panel connecting consumer attitudes and their actual purchase behaviors. The panel solution, which is being launched in the U.S., is designed to allow marketers to identify how shifts in brand equity result in changes in actual purchase behaviors; monetize the outcome of marketing efforts through single-source, cross-media evaluation; understand the contribution of digital advertising to offline sales; and diagnose the reasons why a brand's actual sales may not be in line with expectation.
www.millwardbrown.com

••• ad research

Ignite takes on CPG

Finding the connection between online advertising and offline buying

Research companies InsightExpress, Stamford, Conn., and SymphonyIRI Group Inc., Chicago, have partnered to launch Ignite CPG, a solution that combines InsightExpress' digital ad measurement capabilities with SymphonyIRI Group's offline consumer packaged goods, liquor purchase and Hispanic market panel and point-of-sale data. This integrated approach aims to provide insight into the ROI of advertising campaigns by helping marketers understand how ad exposure – including display, video, e-mail, CRM and search – drive in-store buying behaviors.

Rooted in an integrated measurement approach, Ignite CPG is designed to evaluate advertising across several dimensions, including media plan targeting efficiency, consumer response to a brand and offline sales impact.
www.insightexpress.com

••• customer experience

Organizing the chaos

Software companies partner to provide CEM insights from unstructured data

Research software companies Confirmit, Oslo, Norway, and Clarabridge Inc., Reston, Va., have partnered to offer a solution designed to allow enterprises to use text-based, unstructured data sources, such as e-mail, social media, verbatim survey responses and other free-form text, to drive voice-of-the-customer, customer experience management and research programs while producing tangible ROI.
www.confirmit.com

••• sales forecasting

The power of P2P

Predicting WOM influence on new product success

Wilton, Conn., research company Top Box Associates has released a prospective forecasting tool designed to study social activities and their influence on new product sales and add foresight by quantifying the degree to which social activities influence a prospective new product's sales before the product launches. It focuses specifically on social media or person-to-person word-of-mouth messages and their ability to move brand sales.
www.topboxassociates.com

••• Briefly

■ San Jose, Calif., research company Crowd Science will use components of San Francisco research company Krux's platform to help power its consumer tracking, data analysis and audience

segmentation. The audience insights delivered by Crowd Science will be integrated with the Krux Audience Data Control platform, aiming to shorten the path from analysis and insight to action and results.
www.crowdscience.com

■ YouTube, San Bruno, Calif., has debuted YouTube Analytics to replace YouTube Insight as its free tool, designed to allow anyone with a YouTube account to view detailed statistics about the videos that they've uploaded. YouTube Analytics remains free to use and offers several updates, including a new overview that displays information quickly, while also enabling users to access more detailed information; more detailed statistics to gain a better understanding of their content and audiences; the ability to discover which videos are driving the most views and subscriptions; and the ability to see how far viewers are watching through their video.
www.youtube.com

■ Los Angeles research company Passenger has released its iOS mobile app designed to allow members to participate in the private online community experience via mobile phone. The app offers three key features: Ideas, to allow members to share their ideas instantly with the ability to include photos/videos; Polls, which use push notifications to solicit feedback through a variety of interactive poll types; and Discussions, to allow members to engage in moderated real-time dialogue.
www.thinkpassenger.com

■ Prosper, a Worthington, Ohio, research company, has launched the Automotive Android Tablet App and InsightCenter, intended to provide a monthly look at the automotive market by drawing insights from 8,000+ consumers. It also pairs its information with data from the U.S. Department of Labor and the Energy Information Association.
www.goprosper.com

■ Roger Green and Associates Inc., a New Hope, Pa., research company, has debuted Payor Value Assessment (PVA), a methodology designed to help health care clients determine how insurers and payers will react to developmental compounds and in-licensing candidates. PVA aims to allow clients to concurrently test target product profiles for clarity, completeness and perceived value; learn which products and markets current payers see as analogs; pressure test responses to access and reimbursement questions in a peer-review setting; and unearth drivers and barriers to pinpoint how market development might vary from the forecast.
www.rogergreen.com

■ San Francisco research company AskYourTargetMarket has launched a free service designed to allow users to carry out surveys with friends, colleagues, clients or social media contacts. Users must still pay to access the firm's own panel of respondents.
www.aytm.com

■ Kinesis Survey Technologies LLC, Austin, Texas, has updated its Kinesis Survey platform to include data export integration to Cambridge, Mass., research company MarketSight's analytics and reporting software.
www.kinesissurvey.com

■ London research company YouGov has rolled out Launch Monitor in the U.K. Launch Monitor is its weekly brand and product polling tool designed to track the performance of new fast-moving consumer goods brands and products, line extensions and relaunches in their first few weeks. The tool measures consumer reaction in real time and feeds this back to marketers to enable them to adjust their early-stage approach.
www.yougov.com

■ London research company OpinionPanel has launched two omnibus services in the U.K.: Young Professionals, including respondents in their first five years after leaving university; and All Youth, including respondents ages 16-24. These will operate alongside OpinionPanel's Student omnibus of undergraduates at universities across the U.K. All three omnibuses run weekly, online among 1,000 respondents.
www.opinionpanel.co.uk

■ Paris research company Ipsos has launched an online panel in Saudi Arabia with panels in Egypt, the United Arab Emirates, Jordan, Lebanon, Syria, Morocco and Tunisia to follow.
www.ipsos.com

■ Bangalore, India, research company Borderless Access has launched consumer panels in South Africa and Argentina.
www.borderlessaccess.com

■ The online chefs panel, built in April 2011 by Surrey, U.K., research company EasyInsites on behalf of U.K. food producer Premier Foods, has achieved over 1,200 panelists.
http://premier-chefs.easypanelsite.net

■ HealthFocus International, a St. Petersburg, Fla., research company, has introduced Actionable Solutions for Different Overweight Segments of the Population, a study that groups consumers into segments based on their views and understanding of weight as an issue.
www.healthfocus.com

■ Research companies PubTrack, New Providence, N.J., and BML, Oxford, U.K., have launched the Consumer Travel Report to survey and evaluate key groups of travelers to reveal why and how travel information needs are changing. The first survey will analyze travelers in three categories: travel guide buyers, travelers who buy books but not guides and travelers who do not buy books.
www.bookmarketing.co.uk

The irreplaceable on-site ethnographer

| By Bill Abrams

snapshot

Online qualitative is growing in popularity, the author admits, but sometimes there's no substitute for actually being there.

Much has been written recently about online qualitative research. In particular, mobile and online methods are said to allow researchers to connect conveniently with consumers no matter where they live, without the cost of travel and in less time. An indisputable advantage of online qualitative.

Additionally, consumers responding in the privacy of their own homes, without the presence of an interviewer, are said by some to be more truthful. This article takes issue with the latter assertion and makes a case for the ethnographer's physical presence.

Consider the ethnographer accompanied by a videographer or using a Flip-type camera in a consumer's home. While some ethnographers believe in laying back and working primarily as an observer, many others believe in engaging with the consumer. They become the consumer's "instant best friend," sitting down together in the kitchen over a cup of coffee, helping with the dinner or laundry, even holding the baby while mom empties the shopping bags. The familiarity developed in the process often produces intimate revelations and confidences about the consumer's life and true feelings about the products and services she or he uses – revelations he or she may not have articulated to anyone else before and may feel reluctant to discuss with an anonymous moderator at the other end of an open computer connection. We have even seen denture wearers pull out their uppers to show the ethnographer where they hurt.

There are discoveries an ethnographer can make and document only on-site. Here are a few of the opportunities open to the researcher who is actually there:

The complete product experience. As adept with a smartphone camera or Webcam as the consumer may be, it would be much too awkward to maneuver the device while she makes dinner, brushes her teeth, gives her baby a bath or goes through the pain of setting up a new computer – while at the same time carrying on a conversation with a remote moderator. The on-site ethnographer can watch and document the experience from soup to nuts – shifting the point of view when appropriate – whether a consumer is testing a new product to see how it fits in her life or using a product or service she's used hundreds of times before. Often the ethnographer who's right there will capture and probe details that may have seemed irrelevant to a consumer performing a routine task in a routine way.

The surprise in the refrigerator – or the pantry or the medicine cabinet. An experienced on-site ethnographer will spot a product lurking on the back of a shelf, one the consumer wouldn't have thought to bring up or show but that might give a new dimension to her consideration set. It may even provoke a genuine aha! Or, the ethnographer – just walking around the kitchen – can notice equipment the consumer may take for granted but that indicates a particular emphasis on one kind of cuisine. Similarly, a Netflix envelope lying on the hall table may

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Succeed strategically.

provoke a discussion about movies that has nothing to do with the product at issue but may say volumes about the family's tastes.

The tenor and influence of family life. A good ethnographer will learn a lot by sitting down to dinner with the family or accompanying mom as she ferries her son to soccer practice or by watching early in the morning as the family wakes up and comes down to breakfast one by one. How do the kids respond to that new breakfast cereal? Does one of them leave half of it in the bowl? A deft probe will discover why. And is mom off to the office after breakfast? When mom works, how does the level of dad's participation in cleaning, meal preparation and product selection change? Who actually does the dishes or the laundry and how does that influence product choice?

On the go. Shop-alongs can be highly productive. Accompanying a shopper in the store allows an ethnographer to notice the body language, including hesitations before settling on one product or a dismissive gesture as she passes by another. The lure or ineffectiveness of in-store promotions becomes apparent without the shopper having to say a word. This also applies to many kinds of retail venues such as gas stations, banks, electronic stores. What produces an emotionally-charged reaction? What leaves a consumer cold? The ethnographer sees and hears it happen right before his or her eyes. Want a thorough rundown on the purchase decision? The complete process can be explored – from needs felt at home to shopping at the store and then back home to observe storage and product use.

Many other away-from-home occasions offer grist for the ethnographer's mill. Sports of all kinds are usually difficult if not impossible for a respondent to video or even describe himself. An observant ethnographer can catch every detail of the action, including facial expressions, for later analysis. The car offers another opportunity. An ethnographer and a camera accompanying a driver can not only learn which controls are difficult to manipulate but the inconveniences of entering and loading a car as well.

Delve for insights

These are only a few of the ways on-site ethnographers can delve for insights and revelations – often uniquely. While remote online ethnography has many valid applications and definite advantages in time and travel savings, every project should be carefully considered in terms of its objectives and of the optimal depth of information and intimacy sought. In many cases, in-person ethnography will provide a worthwhile vantage point and valuable payback.

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SurveySwipe

| By Tim Macer

snapshot

Tim Macer reviews Survey Analytics' SurveySwipe and its associated modules for mobile research.

Mobile research – or more specifically, self-completion surveys on participants' smartphones – remains something of a conundrum for many professional market researchers. The opportunities it offers are tantalizing, with respondent-centric benefits such as convenience, immediacy, intimacy (as it is a more personal device) and even fun balanced by some great benefits for the researcher, including better engagement, quicker response, sharper and fuller insights, greater candor and less distortion from delayed recall – which have all been reported by practitioners. The problem is that these gains have to be paid for through a ruthless commitment to brevity. This is the brave new world of the five-to-10-question survey and it is one that calls for a fundamental rethink not just of survey design but of the technology required to support these surveys.

Seattle-based Survey Analytics is one technology provider that has embraced mobile research with gusto. Its mobile offer is styled as a solution for creating mobile communities – comprising four complementary modules for deployment to mobile devices, mobile panel and community, a mobile quali-quant ideation tool and, of course, survey management, design and analysis.

There is always the dilemma with mobile research as to whether the mobile survey should use the smartphone or tablet's built-in browser or run as an app that the participant first needs to download. Survey Analytics lets you choose because its SurveySwipe will let you deploy your survey as an app that participants can download on to any of the four main smartphone platforms – Android, iPhone, BlackBerry or Windows Phone 7 or above, or to the device's browser, or mix modes between handheld and desktop/laptop devices. If that is not enough, yet another program in the suite, SurveyPocket, is designed for iPads for offline data collection

SurveySwipe from Survey Analytics (www.surveyanalytics.com)

Pros
- App-based surveys on Android, iPhone, BlackBerry and Windows Phone
- Location-triggered surveys are easy to do
- Tightly integrated with easily-defined custom panels

Cons
- Location-based surveys may drain participant's phone batteries
- Limited set of community engagement tools
- Documentation and help files are inadequate

Pricing
- Standard co-branded package for SurveySwipe mobile apps, panel, up to 30,000 members and one admin user: $8,000 annually plus $2,000 one-off set-up fee. Premium package, including custom apps, custom panel, ideation module, unlimited members and three admin users, from $23,000 annually, plus $2,000 one-off.

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or where a network connection is intermittent.

Location-based services

A great strength of SurveySwipe is its use of location-based services, which means a survey can be triggered by the participant reaching a particular place – which could be a city, a retail outlet within the city or even a particular aisle within that outlet. All you need is the latitude and longitude of each trigger location and to then set the size of the active zone, which can be as little as a few tens of feet.

For location triggering to work, the participant needs to have the app on his or her phone and to have agreed to allow the app to use location services. Then, when the participant strays into the defined zone, SurveySwipe will ping an alert to the phone with a message to say there is a survey to take and cue the relevant survey within the app. It seems to be as seamless and foolproof as it can be, both for participant and for survey creator.

The drawback at present with all location-based services is they eat up the battery life of your participants' devices when switched to the more accurate GPS mode. Cell-based location, which is kinder on the power consumption, can only help to pinpoint locations to within a mile or two.

Sophisticated tool

The survey editor is not specific to mobile surveys and can be used to design conventional online surveys too – it is a sophisticated tool with a wide range of question types and options. Routing logic, randomizations, dynamic answer list masking, text piping and most other advanced survey features seem to be well catered for. You can also start your survey off in Word and then import it. It allows you to designate various question options by putting keywords in braces within your text. This is rather fiddly in practice and the import seems to be most helpful when used simply to import very long questions or simple, unformatted text. However, this lack of focus on mobile at the editing stage means you need to plan your pocket-sized surveys very carefully and select judiciously from a range of options that do not all apply to mobile surveys. Neither does there appear to be quick, simple way to preview the survey as you are writing it to see how it is likely to appear on the target devices.

Though the editor does not make skip logic explicit, as it is largely hidden within the question where the branch occurs, there is an extremely useful diagram you can call up which reveals the logical structure of your questionnaire as a flowchart.

Overall, the survey editor is reasonably intuitive, though being Web-based, it can feel somewhat hesitant and lumpy to use, even on a fast connection. Context-sensitive help is available but it tends to be rather verbose on the obvious points and less forthcoming when more obscure information is sought. For more general questions, an FAQ approach has been taken. For such a vast and sprawling application, this is inadequate and does not do it justice. Professional users need their infrequently-asked questions answered too.

Work with a panel

The developers have rightly anticipated that most survey designers will be creating mobile surveys to work with a panel or research community. MicroPanel is provided as another integrated Web-browser-based module with the aim of making it easy to create your own custom panels or communities. It is certainly very easy to create either a one-off panel or, by adding facilities for user-contributed microblogs and polls, the panel can be run as a community. In the next release, Survey Analytics will be adding a "Badge Farm" that will allow community members to earn kudos and recognition from their contributions as well as, or as an alternative to, points.

Panels/communities can be co-branded with some limited artwork modifications to demonstrate your own identity within the standard pricing but you can pay extra for the creation of a custom fully-branded panel. The same approach applies to the survey app itself, which can either be a generic SurveySwipe app, within the standard price, which may mean sharing surveys with other researchers, or Survey Analytics will create and register a custom app with the different download sites (e.g., Apple's App Store and the Android Market).

Researchers are increasingly finding that mobile, as a research channel, sits at the junction of quant and qual – especially with the ease by which participants can upload pictures or videos taken with their smartphone and then provide commentary or captions for these. This capability is well-supported in SurveySwipe and there is even some support for analyzing unstructured text within the Survey Analytics analysis module. But this can be taken further with another add-on module, IdeaScale, which is a co-creative idea generator that allows panelists to contribute ideas and vote on other's ideas. The module will work both as an app on the same range of mobile devices or on a Web browser.

At this point, beyond IdeaScale, no other advanced engagement tools are offered on this platform, though more are surely bound to follow.

SurveySwipe in action

Dhaval Shah is project manager for business applications and a member of the innovation team at Ipsos Loyalty in Parsippany, N.J. He has recently guided the company through the process of implementing SurveySwipe and related technologies from Survey Analytics. "Our clients were coming out with their own mobile apps to reach their customers, especially for their retail brands," he says. "We knew we wanted to do something similar with our own Ipsos Loyalty mobile app to help clients engage directly with customers. We also wanted to bring together the power of two-way communication and the potential of location services to create a mobile app with strong community capabilities.

"We looked to the market to identify existing technology solutions available for this kind of research. We found most companies were behind the times on location services and they did not share our vision for creating an app that would lend itself to building strong communities. But the team at Survey Analytics shared our enthusiasm for combining two-way communication and location services and they were excited about working with us to build a robust solution."

To build this solution for Ipsos Loyalty, Survey Analytics integrated SurveySwipe with IdeaScale. It also customized back-end analysis tools to extract and process the results. "We are able to host IdeaScale within the community and trigger location-based surveys. For example, we can trigger surveys when panel members enter a particular store. Members can then take a short survey, take pictures and post them as part of their feedback. This information helps generate meaningful analytics and also helps us provide real-time feedback to the store manager."

Asked about the reliability of the location-based triggers, Shah reports, "So far we are seeing good accuracy to within 50 to 300 feet. But we can also expand the zone to 500 feet based on the requirements of the study."

The response from participants has also been encouraging. Panel members can choose how they want to participate – using mobile phones or via a PC. "So far, we are getting great responses on the Ipsos Loyalty mobile phone app – it's a very useful mechanism for giving prompt feedback and people find it easy to respond immediately," he says.

"Not only is the software performance up-to-standards, it is also easy to use while setting up surveys and administering them. Survey design and setup is largely done by the client service teams at Ipsos Loyalty, with occasional consultation from the firm's technology group. Training new users to write surveys and administer them is an easy process and rarely takes more than a day. The solution has proved to be very productive for some of our research at Ipsos Loyalty.

"We can get a survey out to panel members within the hour and get insightful and timely results back to the client within 24-48 hours. It is a great example of what we mean by 'point-in-time' research," Shah says.

Each survey engagement is carefully restricted to five minutes or less. "We can ask a couple of open-ended questions or maybe up to 10 closed questions in this time," he says, admitting that this does restrict the kinds of research the channel is suitable for. "But with this you get immediate feedback on whatever is happening at that time. We think of it as a 'flash mob' survey. Combined with traditional research, this feedback can prove to be an invaluable tool to measure customer loyalty while creating a rich dialogue with customers."

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Trying to bring the numbers alive

| By Jyanping Rung, Benjamin Woll and Carl Edstrom

snapshot

A report on efforts to fuse behavioral, psychographic and demographic information to identify segments and track marketing results.

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Segmentation remains a powerful tool for strategic marketing planning and execution. It enables brands to tailor innovation and messaging to the needs of targeted customers and to focus scarce marketing resources more efficiently. To be effective, market segments must be measurable (segment size, purchasing power, key characteristics and preferences can be measured), substantial (segments are large and profitable enough to serve), accessible (segments can be effectively reached and served), differentiable (segments must respond differently to different marketing programs) and actionable (segments can be attracted and served practically and cost-effectively)[1].

Traditional segmentation with cluster analysis has several key limitations:

Separated information base. Actual consumer behavior is not usually combined with psychographic, demographic and geographic information to identify segments. As a result, segments can be less effective because critical attributes are not well connected from an analytic perspective; there's no 360-degree view of the consumer.

Deficiencies of cluster analysis. Various cluster analysis methods such as hierarchical and k-means cluster analysis are distance-based and are unable to capture data distribution patterns. Distances can be arbitrary with various scaling practices[2]. In addition, these techniques are unable to deal with nominal variables.

Weak or non-existent tracking of segment-specific marketing results. Companies can have difficulty targeting shopper segments that are not measurable or trend-able. Therefore, segmentation results often "sit on a shelf" because there's no optimal follow-up process in place to measure the effectiveness of subsequent marketing campaigns.

No buy-in from key partners. Incomplete and challenging-to-track information is unlikely to acquire buy-in from key partners (e.g., sales teams, media partners, retailers).

In our view, however, the following segmentations, using the National Consumer Panel (a joint venture between SymphonyIRI and Nielsen that tracks household purchasing) as a sample source and a latent class methodological analysis approach (Figure 1) overcome the aforementioned limitations and ensure a more effective result. Here's why:

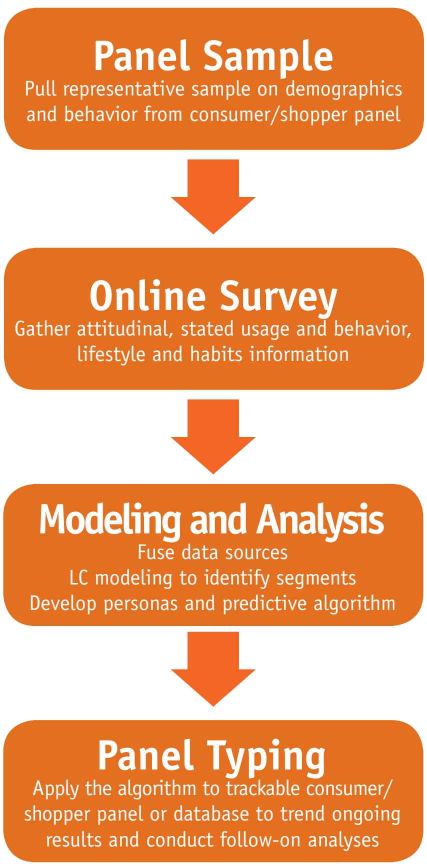
Combined information base. Members of the National Consumer Panel (NCP) scan and report purchases on a large variety of CPG categories. Using NCP as a sample source allows us to combine actual purchase behavior with psychographic, demographic and geographic information during the segmentation process. As a result, segments are more effective and reliable because we can pull sample representative on a demographic and behavioral basis and because all of these characteristics are most often well-connected and help drive segment membership.

Advantages of latent class analysis. Latent class analysis fits the data with a mixture of distributions (latent classes or segments) and classifies respondents to segments based upon membership prob-

abilities estimated directly from the model[2, 4]. This idea originated from work published in 1976 by Paul E. Green, Frank J. Carmone and David P. Wachspress[3]. It has been applied in segmentations for decades and has proven to be robust. Latent class analysis captures data distribution patterns and is able to handle both nominal and numerical variables. It is both descriptive and predictive. Its diagnostic information and segment descriptive outputs often lead to optimal segmentation schemes.

Enable tracking of segment marketing results. We can apply a segmentation algorithm to identify segment membership among the broader panel (NCP) and track segment marketing results over time.

Figure 1: Segmentation Approach



Buy-in from key partners. Through ongoing tracking and discrete panel or survey analysis, segmentation results can "live" throughout the organization and with critical partners.

Wine category case study

We conducted a study on wine consumption, using the NCP as a sample source. The study's primary objectives were to identify wine consumer segments, understand attitudinal differences between them and profile identified segments by wine consumption, purchase behavior, media habits, channel preferences, demographics and financial outlook. In addition, the project was intended to be a test case for comparing segmentations using a) attitudes and stated behavior only (survey) data inputs and b) attitudinal and actual purchase behavior inputs. In this article, we focus on a comparison of segmentation results developed from these different data sources.

Figure 2: Comparison of Segmentation Results

Attitudinal and Purchase Behavioral Segmentation	Segment Size	Spending Share	Volume Share
Daily Must	16.4%	49.3%	59.9%
Variety Seeker	14.4%	34.0%	24.8%
Savvy Buyer	20.6%	9.7%	8.4%
Personal Image	14.1%	3.1%	3.2%
Occasional	34.5%	4.0%	3.8%

Attitudinal Segmentation	Segment Size	Spending Share[a]	Volume Share[a]
Variety Seeker	17.6%	26.7%	19.5%
Simply Satisfied	18.2%	24.5%	35.1%
Core Drinker	29.4%	36.7%	34.6%
Personal Image	6.4%	4.7%	4.6%
Occasional	28.4%	7.4%	6.3%

[a] Shares calculated from behavioral data after conducting attitudinal segmentation

In both schemes, five segments were identified (Figure 2). The attitudinal and purchase behavioral segmentation scheme enabled more effective segment targeting. The top-two spending (per consumer) segments – Daily Must and Variety Seeker – account for 31 percent of wine consumers but 83 percent of actual wine spending. In the attitude-only segmentation scheme, the top-two spending (per consumer) segments – Variety Seeker and Simply Satisfied – account for 36 percent of wine consumers but 51 percent of actual wine spending.

Two key benefits

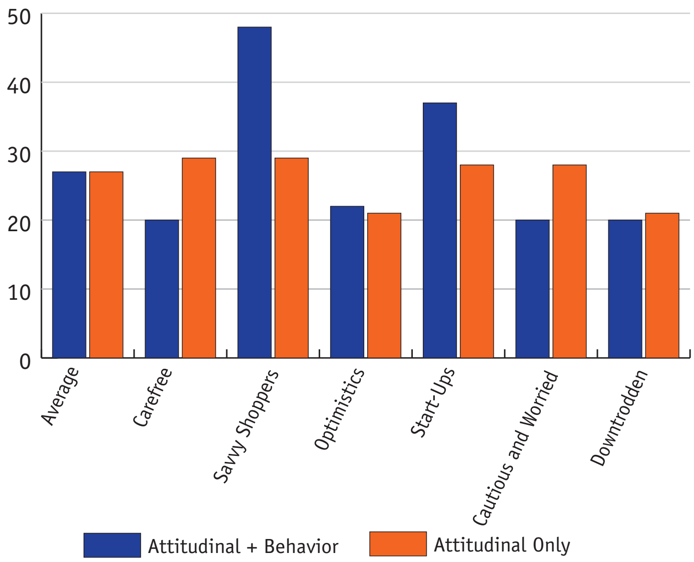
Having compared all the profiling results, we find two key benefits of using both attitudes and actual purchase behavior as data inputs.

1. More distinct segment differentiation. Purchase data drove the heaviest users – who also had attitudes that helped explain usage differences into two segments, rather than spreading them across three, as occurred in the attitudinal segmentation. Attitude statements and self-reported usage behavior helped pinpoint clear reasons for these differences, including the habit of drinking at home with meals (Daily Must) and a focus on value shopping (Savvy Buyer).
2. Clearer view for segment targeting. The Daily Must segment consists of the heaviest users – who drink daily – but this group offers little upside potential. They are brand-loyal, care less about quality and package and buy on low price. Targeting to them may include messages about health and diet benefits, everyday low price points and packaging options that reduce cost.

   Variety Seekers spend a lot in wine, look for variety and high quality and are willing to pay a premium. Targeting to them should include a premium brand image, first-class packaging, high quality, high price, expert rating, event sponsorship and focused attention on wine magazines and Internet media.

   Personal Image consumers are young and just getting involved in the category. Though their current

Figure 3: Percentages of Grocery Dollar Spending with Coupons and Deals



consumption and spending are low, they present growth opportunities. Like Variety Seekers, they are highly attitudinally involved in drinking. They are more experimental and are willing to try different wines and packaging. They also look for unique labeling (and are therefore a promising segment for product innovation). They are more likely to use the Internet to research and buy wines and they communicate via social media, displaying potential to become influential connectors. The challenge is in engaging and influencing their behavior so they eventually behave more like the Variety Seeker or Daily Must consumer.

Savvy Buyers buy on value, consume a moderate to low amount of wine and try different wines. They are the ideal target for deals and/or coupons.

Makes segments more meaningful

Behavioral data delivers more than just purchase differentiation as shown in the wine category case study, it also makes segments more meaningful and reliable. In a recent engagement designed to help manufacturers and retailers intelligently respond to the demands of shoppers across the economic continuum in trying financial times, we pulled household purchase data (behavioral information) across all grocery categories. In this case, the behavioral data included information like coupon usage, deal purchasing, private-label spending and aisle and channel shopping that were used to identify six distinct shopper segments in combination with demographics and survey questions about the household financial situation and outlook, personal views on the economy and economic impacts to shopping behavior and lifestyle.

These six segments are Cautious and Worried (24.8 percent of the total), Carefree (18.6 percent), Downtrodden (17.8 percent), Optimistics (14.3 percent), Savvy Shoppers (13.8 percent) and Start-Ups (10.6 percent). We compared results from two segmentation approaches, one using attitudes and demographics only, the other combining attitudes, demographics and purchase data. Only the addition of behavioral purchase data inputs made clear that Savvy Shoppers spend the most in conjunction with coupons and deals, while Carefree shoppers spend the least in conjunction with coupons and deals. If attitudinal data alone had been used to identify these segments, the segments would not have been differentiable in terms of spending in conjunction with coupon and deals (Figure 3).

Shopper segments identified through both attitudinal and behavioral purchase data information also exhibit strong tendencies to buy different brands and product categories. For example, Carefree are more likely to buy premium brands, while Cautious and Worried and Downtrodden shoppers are far more likely to buy tobacco products and pet food (perhaps smoking and pet ownership help ease pressures caused by ongoing economic challenges?).

Ongoing marketing management

Behavioral information is a critical component to forming accurate and actionable segments, in combination with attitudinal and demographic inputs. Latent class analysis is the preferable methodology for segmentation and can fuse data from a wide variety of sources for consistent analysis. The resulting segments enable more effective targeting and ongoing marketing management. Though we focused on consumer panel grocery purchase data in the wine category and grocery shopper case studies, other behavioral data including credit card transactions, store POS data, Web visits and online orders, loyalty card data and direct marketing and CRM response data can all be adopted for a similarly effective approach to forming meaningful segments.

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case study

qualitative research

Finding the right frequency

How qualitative research helped AARP reach a new audience with its LifeTuner site

| By Kelly Hancock

snapshot

Uncertain of how prominently to brand a new site offering financial advice for 25-to-34-year-olds, AARP relied on one-on-one interviews for guidance.

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When you hear about AARP, you probably think of information and resources for the 50-and-over crowd. But recently, AARP has added a younger demographic – 25-to-34-year-olds – to its target audience.

Studies were showing that a majority of retirement-age workers felt they waited too long to begin saving for retirement, says Jean Koppen, senior research advisor for AARP. "People always wish they started earlier. They wished they knew at 20 what they know at 50 or 60. We realized we needed to reach people earlier to help them."

Preliminary market research identified that AARP could make the greatest impact with an online initiative that would offer financial guidance to young people – before they made common financial mistakes. That's where AARP's LifeTuner enters the conversation.

LifeTuner is a Web site specifically designed to help young people set financial goals, budget their money, manage debt and save for a better future. But targeting a brand new audience raised a lot of questions in the design and look and feel of the site. AARP turned to qualitative researcher Kristin Schwitzer, president of Annapolis, Md.-based Beacon Research and a member of the Qualitative Research Consultants Association, to navigate the design of the LifeTuner site. Schwitzer guided the organization through three phases of qualitative research to test various design options, logo placements and new tools.

Phase one: feedback on the alpha site

In the first phase of research, AARP wanted validation of what the early research suggested: that the concept had merit and the name LifeTuner would resonate with the younger audience. It also wanted to test preliminary versions of the site layout and design. "The initial request was to conduct research near Washington, D.C., where AARP is located, to avoid travel costs and make it easy for the team to observe the interviews," says Schwitzer. "However, in order to reach young people across the country,

AARP agreed with my recommendation to include some Webcam interviews. AARP hadn't done online qualitative research via Webcams before but it was clear that we needed the broader audience."

Koppen agreed, adding that online research also allowed interaction with respondents in their natural environment. "Webcam interviews were particularly effective because respondents viewed the site where they normally would engage with it – at the kitchen table, on their laptop, on their bed, at various times of day when they would typically be online, etc.," she says. "This methodology brought a greater sense of realism and authenticity to the site testing, as opposed to placing respondents in a sterile testing environment."

Schwitzer conducted 29 one-on-one interviews, about three-quarters of them via Webcam and the remainder in-person. The methodology allowed for in-depth feedback on ways to improve the alpha site before it went into beta.

The early research suggested that users needed to understand within the first few seconds that LifeTuner was relevant to someone their age; when they saw the AARP name, they assumed it wasn't for them. "We wanted to make sure that a fresh set of eyes, who did not know that LifeTuner was connected to AARP, and who had no other previous experience with the concept, thought it made sense for AARP to be in this space," Schwitzer says. "We tested their blink reactions to the name LifeTuner and reactions to various branding options. Should the AARP logo appear on the site? How much emphasis should be placed on it? We also did more traditional usability testing that was task-oriented."

The usability testing portion of phase one explored things like whether or not respondents could easily navigate the site, likes and dislikes among the features, how useful the information was to a 25-to-34-year-old and ideas for improving the design and content within the site.

Phase one research revealed that the LifeTuner name and concept would work, but respondents suggested several revisions to the design. Most users understood why AARP would be doing this site and the well-known and trusted name gave it immediate credibility. However, when the logo was the first thing to catch their eye, respondents assumed the site was not relevant to them. They wanted more information, perhaps a brief YouTube-style video, to explain the purpose. Despite the age stereotype, most still wanted AARP branding on the homepage, as they only trust sites that come from a verified source.

Phase two: displaying AARP sponsorship

While phase two taught AARP that its logo needed to appear on the site, where was the best place to put it? What's the best way to show AARP's affiliation with LifeTuner, while ensuring the intended audience knows it's for them?

The AARP board requested metrics to prove the logo shouldn't be the first thing site visitors see, so Schwitzer proposed a quali-quant method. AARP conducted interviews with 208 respondents, offering a large enough sample size to provide metrics to the board and also give the development team insightful feedback on the design of the site. Each interview lasted two days and consisted of both closed- and open-ended questions.

AARP had previously determined that young adults typically fell into one of four ways of thinking about financial matters. Roughly 50 people from each segment comprised the total of 208 respondents. The four segments include:

- Achievers, who feel successful and satisfied with their current financial situation. They have few worries about money and can offer advice to others.
- Strivers, who are proud of what they've accomplished but still feel anxious about making decisions. They feel like they've beaten the odds and that financial success is within their reach.
- Laid-back, who have few financial assets but aren't worried about it; they don't feel like they need to worry about the future.
- Overwhelmed, who feel that they should be further ahead. They know they should be saving but worry about the future because they're financially strapped and can't save.

"We knew we couldn't be all things to all people but we wanted to be sure whatever we did on our Web site, there would be something for all four segments," Koppen says.

AARP tested four variations of the brand logo placement: logo alone in the top left corner of the home page; logo at the bottom center of the homepage with a tagline; no branding on the home page and explanatory text in the "About Us" tab; videos on the home page of young adults explaining to their peers how LifeTuner helped them.

They also created and tested three new potential Web site designs, based on feedback from the usability testing in phase one.

In phase two, it became clear that AARP's sponsorship shouldn't be displayed too prominently or too early. "You have one chance to tell a young person that it's designed specifically for them. If they see AARP, they won't think it's appropriate for someone their age," Schwitzer says. "If you place the logo in the top left, you may alienate the person on their first visit and may never get them back."

Understanding that point was critical for AARP's internal team, Koppen says. "The young adults liked that it was AARP and had positive impressions; they thought it was the right organization," she says. "It was just the immediate blink reaction that, if the AARP logo was prominently displayed, our target demographic would assume it wasn't for them. That was a difficult message to communicate internally but we had the research to back it up."

Ultimately, AARP decided to combine several of the branding options, placing the logo at the bottom of the home page with the tagline, including a written explanation of why AARP was involved in the "About Us" tab, and creating a brief video that explained the Web site's purpose.

Phase three: offering tools

As the design continued to evolve and content was enhanced on the site, AARP wanted to create several widgets that would apply financial principles to a visitor's personal situation. Before devoting resources to the development of the tools, AARP wanted feedback on whether or not it was a worthwhile investment.

Turning again to one-on-one Webcam interviews, Schwitzer tested early versions of two different tools: a credit card tool and a retirement tool. "We tested both tools for overall usefulness and we wanted to know what was working and what wasn't working so we could further improve the problem spots. But primarily we were focused on the overall usefulness and if the tools would be valuable to the user," she says.

The research showed that respondents were very intrigued by the tools and the target audience would find them very valuable. As a result, a suite of custom, interactive tools is now available on the LifeTuner site. AARP was so pleased with the tools that the LifeTuner team was commissioned to build a new version of the retirement tool for its 50+ audience as well.

Secondarily, during this phase of research AARP also wanted to test the latest version of the homepage design, which had changed significantly following the phase three research. "All the research was very iterative," Koppen says. "Tweaking kept happening. Optimization kept happening. Even after phase three, the Web site continued to evolve. We've made some significant changes to the site, all based on the knowledge that the research provided us."

All three phases

The success of the Web site can be tied to all three phases of the research. It was featured in *BusinessWeek* and received a Gold International Design Excellence Award from the Industrial Designers Society of America in the design strategy category. It's also been listed on Guy Kawasaki's roundup of personal finance sites.

LifeTuner averages approximately 80,000 unique visitors each month, with about 140,000 page views. In addition, LifeTuner has nearly 5,000 "Likes" on Facebook and almost 3,000 followers on Twitter.

The numbers speak for themselves: thousands of young adults – and future AARP members – are getting closer to financial freedom with the help of AARP and LifeTuner.

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••• multicultural/ ethnographic research

Getting to know you

Conducting ethnographic research with Hispanic consumers

| By Pablo Flores and Jennifer Karsh

snapshot

Through tips and a case study example, the authors explain the value of using ethnographic research methods to better understand the Hispanic market.

In the past several years, marketers have become increasingly interested in Hispanic consumers. The latest census shows that the population of Hispanics in the U.S. is on a growth trend, increasing by 35 percent from 2000 to 2010, and expected to increase by another 12 million people from 2010 to 2020 (U.S. Census Bureau). When you consider that U.S. Hispanic spending growth is more than double non-Hispanic spending growth, it's easy to see just what all of the buzz is about.

As a qualitative research firm that specializes in ethnography, we have seen a sharp increase in demand from companies seeking to conduct ethnographic research among Hispanics. Over the course of the last two years, we've led dozens of Hispanic ethnographies for food and entertainment clients – two categories where Hispanic spending growth trumps that of the general market. Even clients who have not traditionally viewed Hispanic consumers as their target recognize the enormous opportunity presented by this influential group.

Intimidated and overwhelmed

As companies look to expand their brand and product offerings to Hispanic consumers, many feel intimidated and overwhelmed. A sense of mea culpa is often encountered among marketers and brand managers, who feel like they should know more about the increasingly important Hispanic market but don't know where to begin. Here's the good news: Ethnography can provide a clear and useful starting point for companies that have never conducted any research among Hispanics. In fact, not being familiar with a market can actually be beneficial when it comes to conducting ethnography. One of the most important tenets of ethnographic research is to begin the experience with what we often refer to as a beginner's mind. This term, taken from Zen Buddhism, suggests that you look at a person or an experience as if you are doing so

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for the very first time. In this way, a lack of knowledge about a given cultural group or market is actually an advantage. Through the absence of preconceived ideas, companies have the opportunity to reap the greatest benefits ethnography has to offer.

So what does it take to conduct ethnographic research with Hispanics? Like all ethnographic research, Hispanic ethnography requires the leadership of a peer moderator – someone who belongs to, or is deeply immersed in, the culture. We sometimes refer to our ethnographic researchers as Sherpas because they provide insider knowledge and guidance in leading clients through the consumer's cultural context and experience. This role is especially important when conducting qualitative research among Hispanics in the U.S. With multiple countries of origin and markedly different levels of acculturation, it is crucial to have a culturally-sensitive Hispanic moderator who is able to bridge the cultural divide and discover insights that will bring the Hispanic consumer experience to life.

The key to ethnography is the act of immersion – taking part in the experience of the field research by actively observing it.

Companies or clients who commission an ethnographic research study should not be passive observers. The key to ethnography is the act of immersion – taking part in the experience of the field research by actively observing it. We call this participant observation. Like a true anthropologist, participant observers immerse, observe and record what they see in order to document the experience and later make meaning of it. While we ask clients to take an open (beginner's) mind to the experience, we offer a primer that helps provide important guidelines and context for their participation. A thoughtful pre-field briefing is also key in preparing participant observers for their important role in the field.

Special considerations

As with any culture, there are special considerations for conducting ethnographic research among Hispanics:

Extend your timeline. When planning your research initiative, you should add one to two extra weeks into your schedule to allow for the additional time required to recruit Hispanic research participants. Be sure to hire a firm that specializes in Hispanic recruiting and ask for several client references. Many recruiters may say they have a broad sample of Hispanics in their database but make sure they prove it to you through references and sample studies. Recruiting Hispanic consumers is a high-touch process that often requires grassroots recruiting, many points of contact and frequent communication.

Hire a Sherpa. Even the most skilled moderator will not be able to decode key insights without proper knowledge of the cultural context. Hispanic culture is multidimensional and represents a wide variety of demographics – from ethnic and linguistic makeup to levels of acculturation and socioeconomic status. Every region, every country and often every city hold cultural nuances that dictate traditions and, more often than not, consumer behavior. An experienced moderator will help navigate the very complex terrain that surrounds the Hispanic consumer.

Open your mind. To have a successful ethnographic research project you don't need to be an expert in Hispanic culture but you do need to be culturally sensitive. A research firm worth its salt will advise you on how best to dress, how to engage and what to expect when observing an ethnographic research session with Hispanic consumers. Being conscious and considerate of customs and beliefs is a crucial component of successful ethnographic research with Hispanic consumers.

Look deeper. Regardless of their language skills, Hispanic respondents may be less forthcoming than the average gen-pop respondent. It is important to keep in mind that the best respondent is not always the most outspoken person. It takes time to create rapport between a moderator and interviewee and even more so for Hispanic respondents, who may not be as comfortable sharing personal information as their gen-pop counterparts. For this reason, a Hispanic moderator's first priority must be to establish a sense of trust and create a safe environment in which respondents feel free to share their innermost opinions and beliefs.

Health and nutrition

As an example of ethnographic research in action, a major health care company hired us to better understand how to communicate to Hispanic consumers on the topic of health and nutrition. Through a series of ethnographies, we talked to more than 30 participants about their medical history, their perspectives on health, wellness and nutrition. We uncovered many important insights:

- Hispanic moms are very self-sacrificing and often put their needs last.
- Hispanics often opt for folk-healing and home remedies before seeking medical advice.
- Diabetes or "sugar in the blood" is viewed with less alarm and urgency by Hispanics versus the general population.
- Hispanic women use the fit of their clothes, rather than a scale, as a gauge of their overall health and fitness.

Among Hispanics, women in particular, the subject of personal health is considered very private. Through use of a peer moderator and one-on-one interviews that took place in the home, we were able to uncover important insights that may not have been gained through a more traditional qualitative or quantitative study.

Insights from this research informed several strategic initiatives, including a public health campaign that directs communication at Hispanic moms to get regular check-ups for themselves so that they may be there for their family.

Meaningful experience

Hispanic culture is one of the richest and most diverse cultures in the world. Once all of the practical considerations have been put into place, you are ready to experience a beautiful, powerful, field cultural experience that will, no doubt, lead to transformative insights. It is not uncommon for client participants to receive a gift from a grateful participant, be invited to a special event or find themselves choked-up from a profound and meaningful experience in the field.

As Hispanics continue to influence and inform culture in the U.S., it is critical to deepen our familiarity with them. Ethnographic research is a valuable tool for conducting qualitative research among Hispanic consumers. Done well, Hispanic ethnography offers an up-close and personal experience with a dynamic and powerful consumer group.

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●●● multicultural research

More than words

A revised paradigm for Hispanic acculturation

| By Miguel Martinez-Baco and Brett Simpson

snapshot

To effectively understand Hispanic consumers, you must go beyond language and incorporate a range of cultural influences, the authors argue.

Researchers with experience in Hispanic marketing and advertising were likely not surprised to learn from the 2010 census that the Hispanic population has grown dramatically and now represents 16 percent of the total U.S. population, and it is officially the largest minority group in the U.S. Moreover, their buying power has grown to $1.2 trillion!

Anyone interested in growing a business is probably wondering how to capture a portion of this important segment and their spending. Thus, the focus is no longer whether you should target Hispanic consumers but rather how to best target them.

The challenge, of course, is that not all Hispanics are created equal. It is not a homogenous segment of like-minded consumers and not all marketing approaches may work. There are obvious differences in terms of country of origin, language preference and media usage. But is that all there is to it? What about how the Hispanic consumer interacts with the marketplace? How does he or she adjust to life in the U.S. and in the process shift his or her attitudes, beliefs and behaviors?

If you want to effectively reach this target, it is important to thoroughly understand what makes them tick and this includes understanding the process of acculturation and how it impacts the consumer.

Acculturation is a cultural adaptation process and it is defined as the learning of ideas, values, conventions and behaviors. It is a process experienced by individuals placed in a new environment with a different culture.

We have all lived through this acculturation process in some way! Think back to when you started college life. Independence, new surroundings, a more relaxed educational structure, different food choices and interaction with a new set of people resulted in an adaptation and learning process. You likely maintained many of your core values but also adopted new traits and behaviors as a result of the new environment. Hispanics moving to and living in the U.S. are no different. When Hispanics move to and live in the U.S., cultural traits are adopted, lost or combined and some new features are generated. It is a cultural process best described as a continuum.

In the context of identifying a marketer's Hispanic target, understanding the impact of

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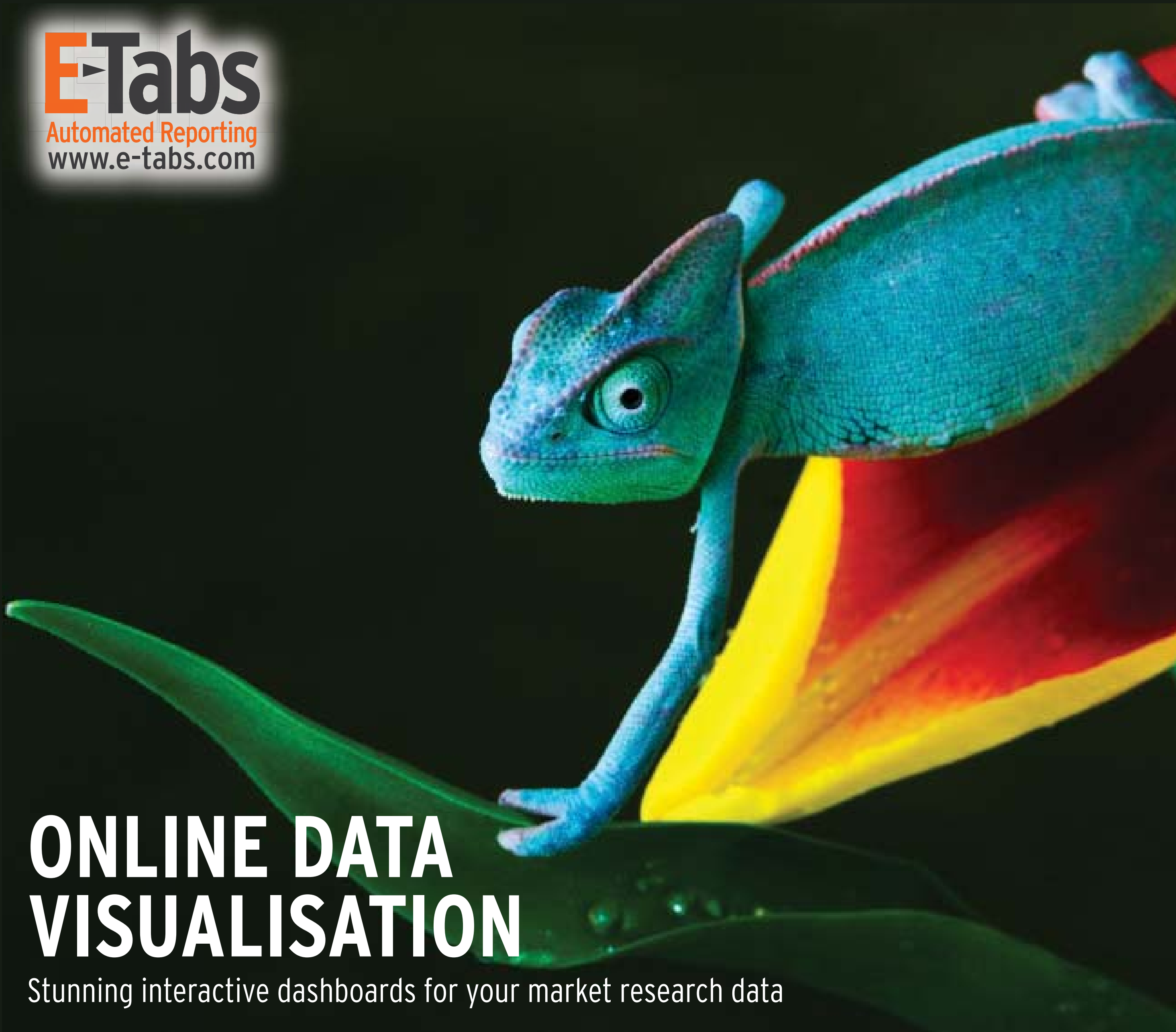

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THE QUEEN'S AWARDS FOR ENTERPRISE: INNOVATION 2010 acculturation is important as it provides insights on how to reach and market to this segment more effectively. Some Hispanics prefer to speak English while some are only able to speak Spanish. Some may shop for products tied to their ethnicity while others shop like the general population. Media messages may hit home for one group of Hispanics but may not be at all appealing for others. There are also differences in education, income, employment, usage of technology and usage of banking products, for example. Because of these differences, acculturation can be a very useful tool in the world of marketing and advertising. Acculturation models allow the marketer and advertiser to segment the Hispanic market into smaller, more homogeneous groups. This approach can help them customize products and messages to a specific segment of the Hispanic population who may find the message more relevant and may trigger the desired purchase behavior.

More effective than others

While there is truly no right way of accounting for acculturation, some approaches are more effective than others. Because acculturation is a continuum, there are many ways to segment the population on the basis of acculturation. In addition, there is a wide range of important characteristics we can use to define these acculturation segments.

Place of birth, age of arrival in the U.S. and language preference are commonly used to segment Hispanics and for good reason. For example, a Hispanic who was born and raised in the U.S. is likely to be at a different acculturation level than a middle-aged man who recently arrived in the U.S. Likewise, a person who can only speak Spanish and limits her interaction to the family nucleus has a different acculturation level relative to a person who is bilingual and is in the mainstream workplace. Variables like these correlate very well with acculturation. In fact, these variables are so important that most models in the research industry address acculturation in this way.

However, while the conventional measures used for acculturation are important, they are not enough. Models that omit an attitudinal or behavioral component are missing an important dimension, which may lead to an inaccurate view of the Hispanic segments and misguide message development or a marketing positioning. When attitudes and behaviors are leveraged we are able to expand on our knowledge and insights of the Hispanic population, which allows us to be more effective in developing a research or marketing program.

To illustrate the concept of acculturation, narrative descriptions of four consumers from a single Hispanic family are presented in the sidebar and describe varying degrees of acculturation levels. All four individuals are from the same Hispanic family, arguably with very similar values. However, their attitudes and behaviors are different due to acculturation.

Chris is the most acculturated of the four and would be classified as a fully integrated Hispanic. Maria, her sister, is not quite the same as Chris due in part to her marriage to Manuel and also because she has not always lived in the U.S. Maria is what is known as a bicultural Hispanic. At the surface, Gerardo and Manuel are both unacculturated but are they really the same? Conventional acculturation models would consider them to be similar since they have

Degrees of acculturation: a tale of four consumers from a single Hispanic family

Gerardo has been in the U.S. for five months and is counting the days before he goes back home. His family is still in Mexico and he is going back in a couple of weeks once the work contract is over. He is lucky his cousin Manuel lives in the U.S. The only thing Gerardo is missing is his family. He thought he was going to miss some of the treats he likes from back home but he needn't have worried! Gerardo has access to plenty of stores that have items from all over Mexico. He's happy that he has even been able to keep up with his favorite soccer team on TV. He cannot understand why people say that living in the U.S. changes you; that certainly has not been the case for him.

Manuel was happy to help his cousin Gerardo during his stay in the U.S. He understands why Gerardo will go back to his family but can't imagine doing so himself. After all, there are so many opportunities here. That's what made him move in the first place. Jobs were scarce back home and he needed to help his aging parents, who could not work anymore. He has been in the U.S. for a couple years now, where he has been able to keep a steady job and send money back home. It has been difficult to adjust but it was the right thing to do. He has a family of his own now and knows he will be able to provide a future for them. He knows minimal English but understands he will need to learn and adapt if he wants a better future for his family.

For Manuel's wife Maria, it has been interesting to have Gerardo in the house. Although Maria remembers moving to the U.S., it was so long ago and most of her life has been here. When she married Manuel it was like rediscovering her roots and having Gerardo in the house has made it even more so. It has been a great experience and she now feels like she has two worlds – one where everything is "Hispanic" and another where things are very different, like the world of her sister Chris.

Chris was born in the U.S. English and Spanish were both spoken at home when she was growing up. Although there were channels in Spanish on cable, she regularly watched English-language television. As a result, she speaks very little Spanish but that does not matter to her. She still feels pretty much Hispanic and proud of it, particularly when she gets together with her family during the holidays. She likes to cook and her specialties are burgers and Tex-Mex. One day, she hopes to be as good as her mom was with the more traditional cuisine where her family is from. She's been eyeing a cookbook on Amazon.com that promises traditional food like her mom used to make but adapted to what she can find here in the U.S. Maybe she'll cook the next traditional holiday meal for the family, with a twist!

Figure 1: Hispanic Segments Across Conventional Hispanic Acculturation Descriptors				
	Less Acculturated		⇔ More Acculturated	
	Culturally Entrenched	Culturally Transitional	Bicultural	Fully Integrated
Country Of Origin				
Born In The U.S.	7%	4%	29%	67%
Not Born In The U.S.	93%	96%	71%	33%
English-Language Proficiency				
Very Well or Pretty Well	19%	9%	71%	95%
A Little or Not At All	81%	91%	29%	5%
Spanish-Language Proficiency				
Very Well or Pretty Well	98%	96%	95%	76%
A Little or Not At All	2%	4%	5%	24%
Typical TV Viewing Habits				
More English Than Spanish	3%	2%	17%	73%
Spanish & English Equally	30%	25%	64%	24%
More Spanish Than English	67%	74%	20%	4%

each spent a short amount time in the U.S., are Spanish-dependent and rely on Spanish-language media. They are not the same, however. Manuel is more engaged with U.S. culture but also has a stronger connection to Hispanic products and communication while Gerardo has no interest in adapting and is more isolated from marketing communication efforts. Their attitudes and interactions with the marketplace are very different. So how can we separate these individuals as part of an acculturation model?

Leveraging cultural attitudes

Our firm recently conducted quantitative segmentation research among a representative sample of English- and Spanish-speaking U.S. Hispanics. The overall goal of our research was to determine whether an acculturation model leveraging cultural attitudes could be more effective than conventional language and characteristic-based models.

Our research uncovered four distinct Hispanic groups (Figure 1). Notice that the conventional acculturation drivers such as being U.S.-born, language proficiency and media usage are able to identify the Fully Integrated and Bicultural segments but do not distinguish the two less-acculturated groups. Our model was able to use cultural attitudes and behaviors to separate the less-acculturated Hispanics into two groups – Culturally Transitional and Culturally Entrenched. The Culturally Transitional group is more connected to Hispanic culture and more likely to shop for products in Spanish than the Culturally Entrenched segment. Despite many similarities, these segments provide different opportunities and require a customized marketing and advertising approach.

A detailed description of the four Hispanic consumers is provided below:

Culturally Entrenched Hispanics (Gerardo)

This group has spent the least amount of time in the U.S. and recently immigrated as adults. Very few speak English, meaning Spanish advertising is a requirement to reach this target. Despite living within the U.S., this group is not compelled to adjust to mainstream U.S. society. Instead, they tend to be part of a community or sub-culture of Hispanics that meets their needs without requiring adaptation. Assistance from family and friends and specialty stores with Spanish-language and ethnic products allows this group to function with minimal adaptation. Blue-collar jobs, low incomes, low education levels, a tendency to be under-banked and low technology usage are common among this group.

Culturally Transitional Hispanics (Manuel)

Hispanics within this segment tend to be more driven and realize they need to adapt and interact with mainstream U.S. culture in order to succeed. This group has also spent a short amount of time in the U.S. and immigrated as adults. Spanish is currently their language of choice, although there is a desire to learn English. While the need to adapt to mainstream culture is understood, this group also has a strong desire to preserve a close connection with their Hispanic culture and heritage. Thus, respectful cultural communication in Spanish hits home. This group also tends to be employed in blue-collar jobs, have low income, low education, are under-banked and low technology users.

Bicultural Hispanics (Maria)

Bicultural (or bilingual) Hispanics are closely attached to both cultures. They take pride in their Hispanic heritage but are also fully immersed in U.S. mainstream culture. They use both English and Spanish, adapting to different social circles. Spanish marketing communication is not necessary but can be a method of effectively connecting with their Hispanic bond. This group is a mixture of foreign- and domestic-born but they have spent a substantial amount of time in the U.S. Most were born in the U.S. or immigrated at a young age. They have moderate income and education levels and index high on banking and technology usage.

Fully Integrated Hispanics (Chris)

Many similarities exist between the general U.S. population and Fully Integrated Hispanics. Most were U.S.-born, resulting in mainstream culture being woven into their cultural DNA. They are bilingual but primarily speak English. Spanish marketing communication has minimal influence on their behavior. Their connection with Hispanic culture is low and they do not actively seek products tied to their heritage. This group is highly affluent and educated and index high on technology and banking product usage.

Not a homogeneous group

The increasing presence and buying power of the Hispanic population makes this group a critical segment for researchers and marketers. It is important to understand that Hispanics are not a homogeneous group and that there are many nuances that go beyond the language they prefer to speak or the media they watch. While Spanish-language communication is a requirement for most Hispanics, it doesn't guarantee success.

Acculturation is a great tool you can use to enhance your understanding of this market. As you consider an acculturation approach, it is important to make sure the model considers and incorporates cultural attitudes along with conventional classification dimensions in order to maximize your understanding of the Hispanic population. In the end, you will be rewarded with more relevant insights and a more effective marketing and advertising program.

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••• customer satisfaction

Transcending brand and loyalty – part II

Rethinking the customer experience

| By Danica R. Allen

snapshot

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

This is the second of a two-part article describing a new system for consumer experience measurement capable of subsuming both brand and loyalty research. Last month, we introduced the basic building blocks of this system. This involved a common currency and a common language that facilitate spanning the chasm between brand and loyalty. The common language involves experience touchpoints (XPs), which may include indirect brand exposures such as a friend's recommendation or direct interaction such as usage or ownership.

The system's common currency has its roots in evolutionary psychology and mind modularity. In effect, this approach advances the idea that, in a Darwinian fashion, the human mind has developed five separate and distinct modules to process its environment: cognitive; social; sensorial; emotional; behavioral.

According to evolutionary psychologists like Pinker (1997) and Plotkin (1998), each module has adapted to the unique aspects of one of five environmental elements. This modularity facilitates our day-to-day journey through life and helps us process our complex environment. That each module has evolved to process a unique dimension in parallel makes our lives easier and perhaps has even ensured the survival of our species. There is a very real likelihood, for example, that the behavioral module is more closely linked to the autonomous nervous system. It makes sense that in a life-threatening situation the behavioral module would engage first and invoke a fight-or-flight response.

The system described in this article interleaves the evolutionary psychologists' mind modularity concept with the work of Pine and Gilmore (1997). The latter focused on the emergence of an experience economy. Of particular interest was the notion of memorability as a critical nature of the economic offering. We embraced this concept and as will be described later, determined that it represents a critical aspect of the consumer experience.

As described in part one of this article, the five modules were translated into consumer-friendly terms and enhanced with graphic icons (Figure 1). Respondents then used the drag-and-drop interface to rate a particular experience point (XP) in terms of the memorability and impression (va-

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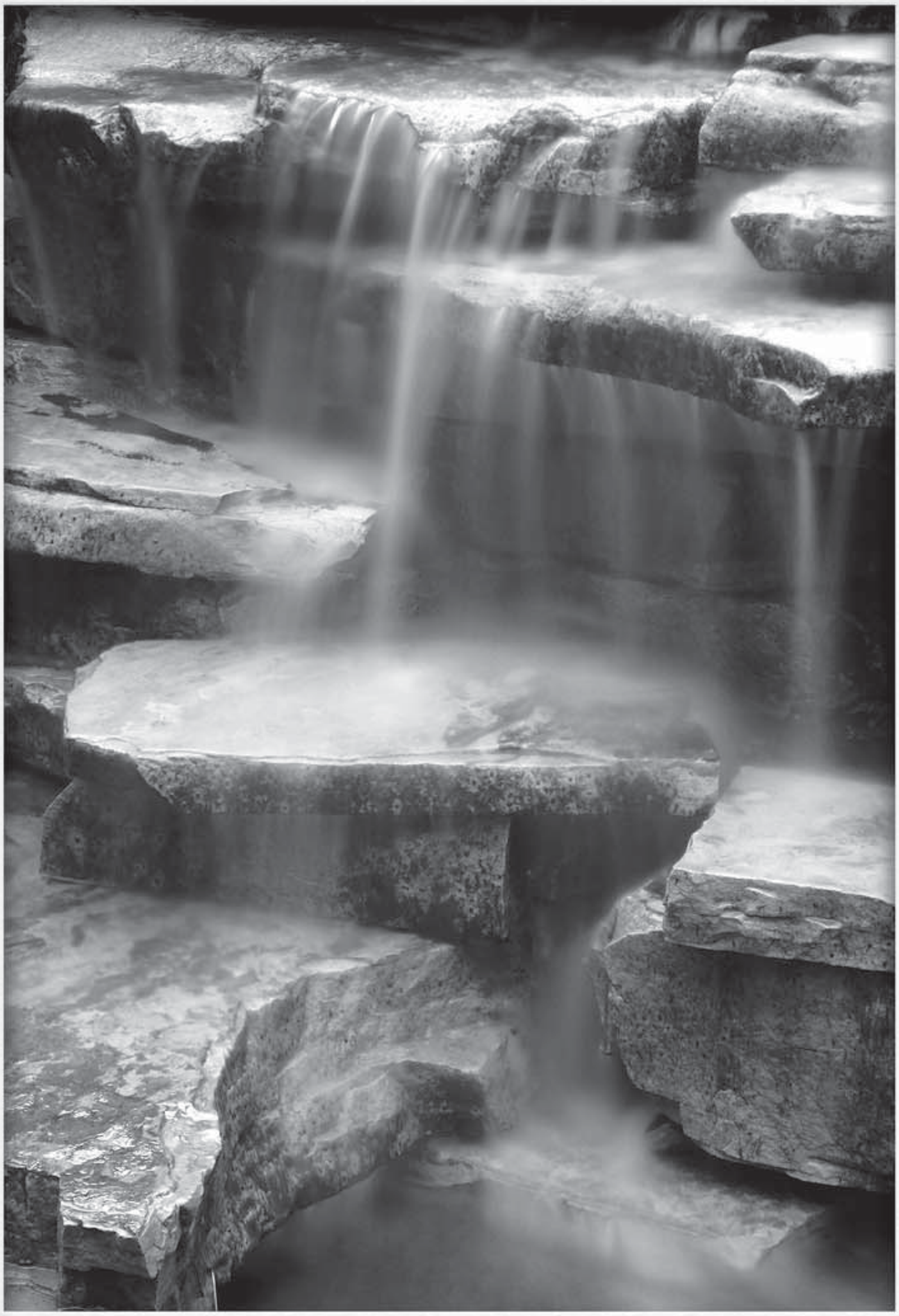

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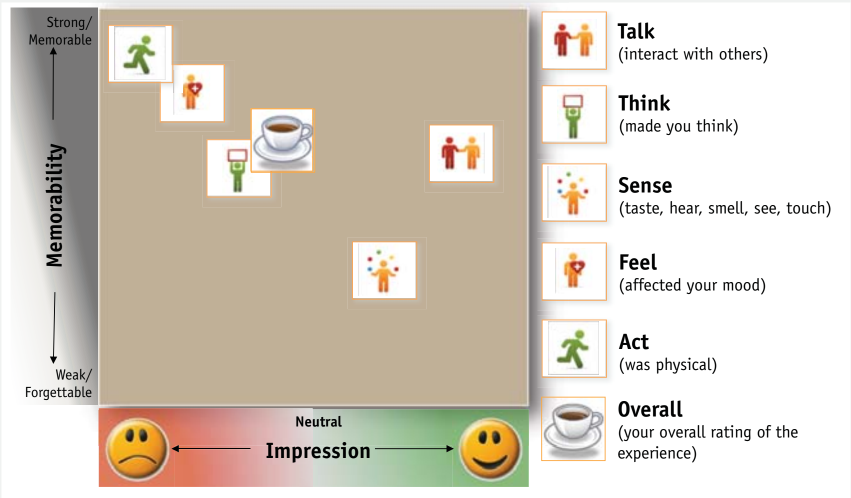
The Fine Art of Marketing Research

Figure 1: Mind Module Icons and the Drag-and-Drop Interface

Figure 2: Illustration of Five Experience and One Overall XP Icon Placements



lence) of each dimension. Finally, a sixth icon representing the overall experience point was also moved into the quadrant space. Prior to engaging in this task, respondents were extensively socialized with the dimensions and quadrant axes.

Figure 2 illustrates the result of one hypothetical respondent's placement of the five experience icons and an overall (coffee drinking) experience point. By dragging and dropping the five mind module icons and single overall experience icon into the two-dimensional space, respondents created 12 unique scores. That is, each icon was associated with an x-axis score and a y-axis score. The resultant data, as described in part one of this article, yielded psychometric properties that were more desirable than traditional Likert scales. A parallel study demonstrated that Likert scales produced heavily left-skewed distributions with respect to the five dimensions and a wide variety of traditional brand and loyalty KPIs.

The x- and y-axes of the quadrant represent the critical dimensions upon which each mind module icon is evaluated. The horizontal axis represents impression or valence. Its endpoints range essentially from bad to good though these verbal anchors do not appear on the scale. The range is reinforced with color (red to green) and the visible smiley faces. Thus, the x-axis is not terribly different from the quality construct that typifies most customer satisfaction or loyalty research.

In contrast to the x-axis, the quadrant's vertical axis represents a serious departure from traditional measurement. It addresses the memorability of each experiential dimension. Interestingly, memorability plays a substantive role in unaided brand and advertising recall studies but has not been researched extensively by customer satisfaction or brand researchers from a cognitive perspective. In the quadrant depicted in Figure 2, the memorability axis is anchored by weak/forgettable on the low end and strong/memorable on the high end. A simple but very difficult-to-answer question is: What makes each of the five experiential dimensions memorable?

Having information regarding both quality and memorability provides managers with greater flexibility when it comes to enhancing consumer experiences. Our research has shown quite unequivocally that the two axes yield very low ($r<.2$) correlations. Quite clearly, quality and memorability are not the same thing. Additional research confirmed that the five experience icons' x-axis scores correlated strongly with the overall XP icon's x-axis score but not its y-axis score. The reverse also holds true. This provides compelling evidence that the five experiential icons and the overall XP icon are not simply placed at random by respondents. Parenthetically, although additional research demonstrated that the quadrant drag-and-drop task was rated no more difficult than a Likert scale, we did exclude from analysis the 10 percent of respondents who rated the task as very difficult.

Deeper dive

The dataset driving this article has significant depth and breadth. The reader may recall that the foundational research included five sectors: banking, automotive, quick-service restaurants, shampoo and laptop computers. Each sector subsumed five brands and eight touchpoints. Despite the large overall sample size, many of these cells contained insufficient data for meaningful analysis. This was due largely to the presence of some low-incidence touchpoints (e.g., receiving a free sample of shampoo). Accordingly, a deeper dive into one sector will prove instructive and demonstrate the versatility of these data.

The shampoo sector subsumed eight touchpoints and five brands with the largest U.S. market shares: Clairol, Head & Shoulders, L'Oreal, Pantene and Suave. Four touchpoints are indirect: TV advertising; print advertising; Internet advertising; recommendations from a friend. Four are direct: purchase at a store; use at home; handling the package; free sample.

It has been selected for further

Figure 3: Frequency Distributions: Impression and Memorability – Shampoo Sector

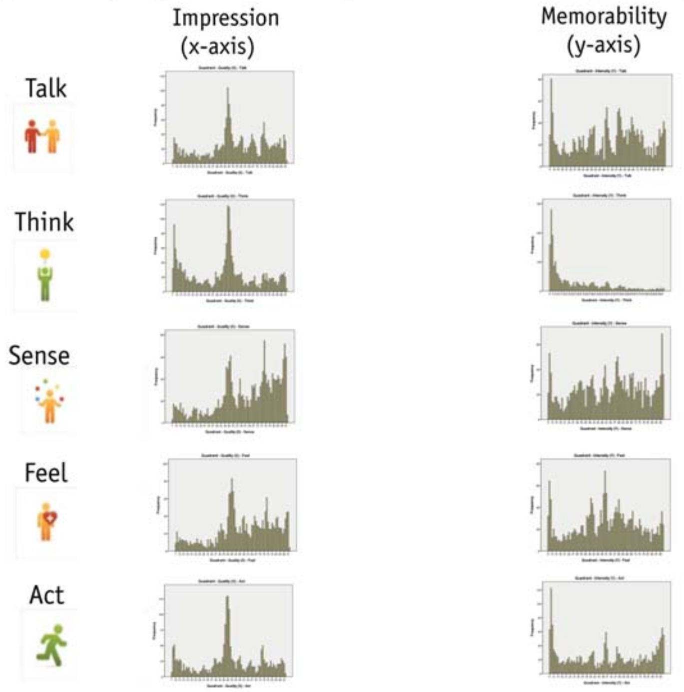
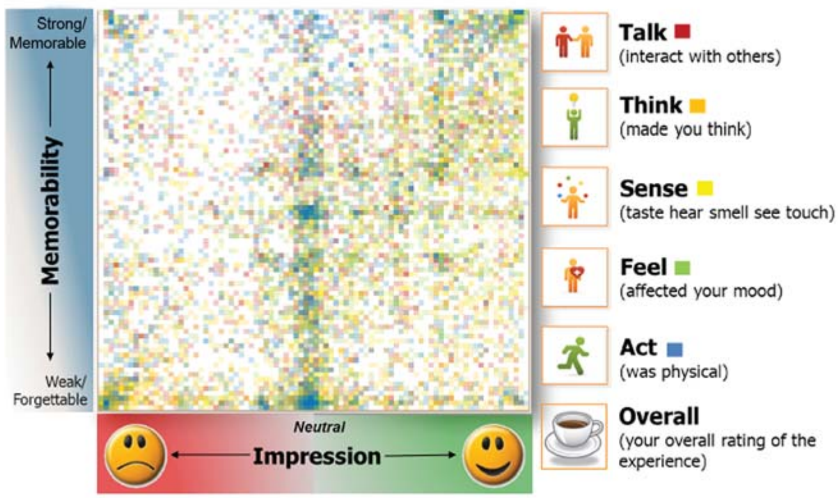


Figure 4: Tile Mosaic Plot – All Brands and XPs Combined



analysis to demonstrate that despite its seemingly innocuous nature the shampoo experience, as defined by the eight direct and indirect XPs, yields interesting and intuitively appealing patterns that can guide managerial action.

In part one of this article all five sectors were contrasted with respect to their impression and memorability profiles. The current deeper investigation looks much more closely at the distributions associated with the shampoo sector and the five brands and eight XPs that defined it. Figure 3 summarizes the data aggregated across all eight XPs. Ten frequency distributions are depicted and all are based on a sample size of n = 2,047.

Clearly, the distributions shown in Figure 3 vary depending on the experience dimension and the axis (memorability versus impression). Let's review the distributions across each of the five experience dimensions. First, the Talk (social) dimension yielded a quasi-normal distribution on the impression axis and a multimodal distribution with respect to memorability. Again, these data are presented at the aggregate level (across all five brands and eight XPs) so it is difficult to ascertain the source of these spikes. The shampoo experience quite clearly was not memorable from a cognitive perspective and actually elicited some negative impressions on the x-axis.

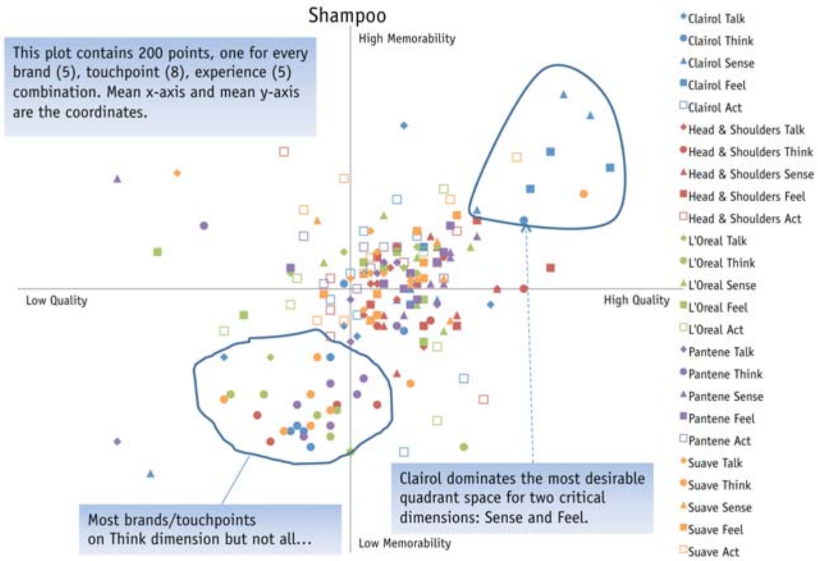
As one would expect, the shampoo XPs included in this project were driven primarily by the Sense and Feel experience dimensions. Although this may be an artifact of selecting the top five U.S. brands (in terms of market share), it remains an intuitively palatable finding. Finally, the Act dimension emerged with a nearly normal distribution in terms of impression and was deemed more forgettable than not by most respondents.

Even seasoned marketing researchers have difficulty re-integrating these two axes into a single x-y plot. To illustrate the unique and flexible nature of these data, our visualization science department created the tile mosaic plot presented in Figure 4. This representation of the data aggregates all five brands and eight XPs. The interactive version of this graphic allows the user to change experience point colors and select data based on a drop-down menu system. This gives users the ability to assess differences by gender, brand, XP, or other relevant data. In the case of Figure 4, the upper-right corner is particularly noteworthy since it represents vivid, positive valence – clearly a desirable location. The tile mosaic graph in Figure 4 is distinctive because of the density of yellow (Sense) and green (Feel) tiles in the upper-right corner. It is quite differentiated in terms of color distributions from other sectors such as automotive, computer or banking.

Depending upon the category and brand one would not necessarily want to have all five experience dimensions rated highly on memorability and impression. This might completely overwhelm the consumer! In the case of shampoo, the cognitive, social and perhaps behavioral experiential dimensions are of less importance than the sensorial and emotional aspects. One could argue that for a luxury shampoo brand, the most desirable strategic position would be to have as many XPs as possible characterized as positive and memorable in terms of the Sense and Feel experience dimensions.

Figure 5 presents a quadrant containing 200 points: the five brands each with eight XPs and five experiential dimensions (Talk, Think, Sense, Feel and Act). Each point represents the average score on the two dimensions. (This is noteworthy because a review of the distributions presented in Figure 3 reveals that in many cases the distributions are far from normal and the mean may be somewhat misleading.) Color is used to highlight the brands and shape illustrates the five experience dimensions. In the interest of

Figure 5: Distribution of Brand/XP Means



clarity, the eight XPs are not further differentiated. As a result, each symbol-color combination is repeated eight times (once for each XP).

There are two aspects Figure 5 that merit discussion. First, the lower-left quadrant is characterized by an abundance of Think (●) symbols. The implication of this is that respondents overwhelmingly moved the Think icon to the lower-left corner of the quadrant regardless of XP (e.g., TV ad, free sample, etc.). While there are some exceptions to this, they are associated with small sample sizes and anomalous.

As noted earlier, given the nature of this particular sector one might argue that the Sense (▲) and Feel (■) dimensions would ideally appear in the upper-right corner. That is, a brand with positive valence and high memorability associated with the sensorial and emotional dimensions would be in an attractive position. Thus, the second noteworthy aspect of Figure 5 involves the brands that dominate the upper-right corner with respect to Sense and Feel.

Clearly, Clairol's Herbal Essences shampoo dominates the upper-right quadrant. The reader may recall that this brand has long been associated with television advertising containing oblique sexual innuendo. The highly sensorial Herbal Essences shampoo experience is playfully depicted in television advertising as nearly erotic. Every sector (and perhaps every brand) is likely associated with a somewhat different ideal configuration of the Talk, Think, Sense, Feel and Act icons. For example, the Herbal Essences profile would not necessarily be ideal for a computer or automobile (although it would be an interesting approach to differentiation!).

Figure 6 presents another visualization of the shampoo brands aggregated across experience touchpoints. In this case, x- and y-axis coordinates greater than 75 on the 85-point "scales" were counted as top-box and percentages calculated and summed by brand within the five experience dimensions. In nearly every case, there were more top box impression ratings than memorability ratings. In one case (Herbal Essences – Talk) memorability exceeded quality. The highest memorability ratings were associated with Herbal Essences though Pantene was close behind. A return to Figure 5 reveals that Pantene enjoyed a fair number of Sense and Feel (average) ratings in the upper-right of the quadrant.

Interestingly, we can take the sum of the five top box experience scores for each brand and describe this metric as a 5-D score. As shown in Table 1, this simple number (the sum of all icons placed above the 75 mark on both quadrant axes) aligns quite closely with 2010 unit volume estimates for each brand. Indeed, the correlation between the two is relatively strong (r = .85).

Table 1: Total Experiential Impact (5-D) and Market Share

Brand	5-D Score	Market Share
Pantene	252	15%
Clairol Herbal Essences	241	9%
Suave	206	7%
L'Oreal	201	4%
Head & Shoulders	183	6%

This research precipitated numerous data visualization innovations including tile mosaic graphs in which the original quadrant space hosts an animated and interactive display of color-coded tiles corresponding to the five experience dimensions. The two-dimension quadrant space facilitates a wide range of graphic representations of data.

Figure 7 depicts the results of eight regression equations – one for every XP. Each column represents a separate regression analysis that combines data from all five brands. The four direct and four indirect XPs (columns) are separated for illustration purposes. The rows in Figure 7 reflect the 10 predictor variables: a quality and memorability metric for each of the five experience icons that respondents moved into the quadrant space. The dependent measure was the product of the overall XP icon x- and y-axes.

Within the table cells that are highlighted in green were statistically-significant drivers of the dependent measure (the product of the overall XP icon's x- and y-axes). Parenthetically, note that this is not the ideal dependent measure because it makes mathematically equivalent a negative memorable experience and a positive forgettable experience. Though more difficult to convey, other approaches such as canonical correlation or SEM (both of which accommodate multiple DVs) are to be preferred.

Perhaps of greatest interest is that Sense memorability was a significant driver for all four of the direct XPs but this was not the case with respect to the indirect XPs like TV advertising. In this case, it seems clear that physical interaction with the product is necessary to generate sensorial memorability. Another noteworthy aspect of the data presented in Figure 7 involves the role of the social (Talk) dimension. It is a significant driver for only one of the eight XPs: recommended by a friend.

It should come as no surprise that the distributions shown earlier in Figure 3 do not yield particularly efficacious OLS regression models. For this reason we employ proprietary Bayesian techniques that yield R^2 statistics ranging from 0.40 to 0.70. Spatial statistics offers another robust approach to treating dependence in what is essentially a Cartesian coordinate system.

Figure 6: Sum of Memorability and Quality Top Box Scores

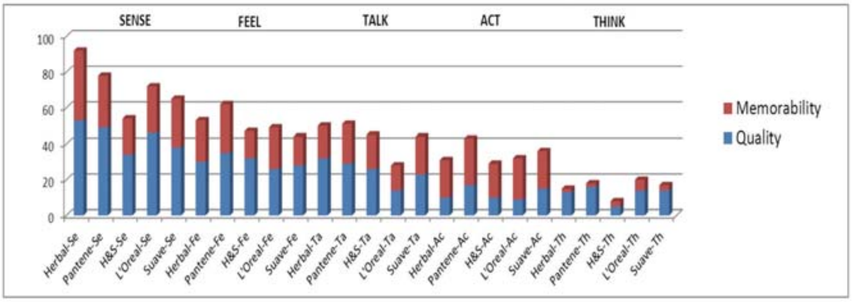
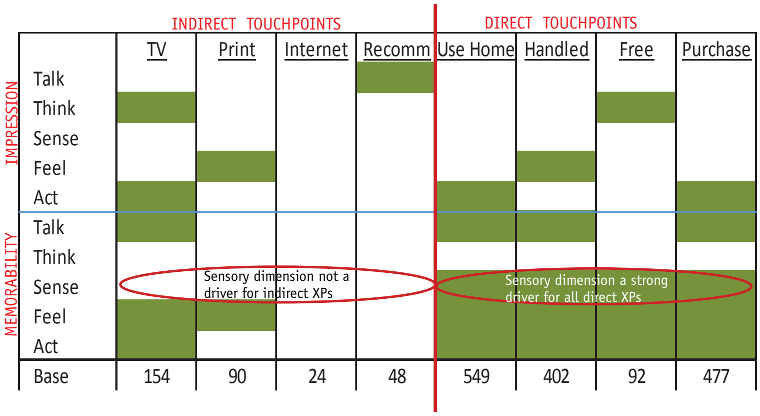


Figure 7: Shampoo Sector: Eight Regressions (All Brands Combined)



Extremely rich

This article could accommodate only a limited amount of information; the dataset described here is extremely rich, spanning five industry sectors each with five brands and eight XPs. Accordingly, only a glimpse into the depth of these data was possible. Future treatments of other sectors and additional enhancements to the system may be the basis for an additional *Quirk's* article.

We feel a number of innovations here will revolutionize how consumer experience measurement is conducted. The five-dimension experiential lens provides a new strategic framework for service and quality improvement efforts as well as brand-touchpoint researchers. Our quadrant drag-and-drop interface has proven to yield data that appear more intuitively palatable with respect to correlational and factorial structures.

Measurement using both impression (valence) and memorability further strengthens the system's power. In the present shampoo example, the free-sample quality and impression were generally rated as poor and forgettable. How might a manager remedy this situation? First, from a quality perspective it is possible that an insufficient amount of shampoo was being provided in the sample or, alternatively, the package was defective and potentially leaking. Enhancing memorability, on the other hand, may entail a more attention-getting delivery method. This added flexibility gives managers more control of the XP and its impact on consumer behavior.

An important aspect of this system that could not be described fully in this article involves our standardized qualitative architecture for explicating the relationship between (in)direct XPs and the five experience dimensions. Clearly, in order to facilitate managerial action, the five experience dimensions (Talk, Think, Sense, Feel and Act) must be translated into highly operational language. This is an extremely critical feature of our system and unfortunately a full explication of the technique is beyond the scope of this article.

GfK's consumer experience measurement system does not displace traditional customer loyalty research. One may reasonably argue that service and product quality research imposes the client organization's structure on consumers. In contrast, the consumer experience model insists that the experience be considered within a five-dimensional framework that better represents how the human mind processes its surroundings.

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new product research

Made to order

Product configuration: a research technique for the times

| By Rajan Sambandam and Pankaj Kumar

snapshot

With more and more opportunities available for consumers to design their own products, a research tool that uses a similar approach makes perfect sense, the authors say.

Research produces the best results when it is most realistic. When consumers are made to go through the same decision-making process that they would have used for actual purchases, the information they provide tends to be more reliable and useful.

The trick is to be able to derive sufficient usable information from those choices in order to form judgments about decision-making that can help companies in their marketing efforts. Methods that have gained in popularity through the last couple of decades (such as discrete choice conjoint analysis) have done this quite successfully. They have used advanced statistical analysis that is still increasing in its complexity and ability to draw ever deeper insights. Compared to an era when preference information was gathered primarily through ratings scales and other context-free approaches, these choice-based methods had a significant advantage in terms of their realism.

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Fieldwork Chicago (North)
Fieldwork Chicago (O'Hare)
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Schlesinger Associates (O'Hare)
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Smith Research (Oakbrook)
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Delve (St. Louis)
Hatch Research (St. Louis)
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Schlesinger Associates

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Taylor Research

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Reality has shifted

But the reality of the marketplace has also shifted in the last decade, thanks to the widespread use of Internet commerce. Among its many significant advantages is its ability to allow consumers to become, effectively, producers. Think of how you buy a computer today. It's not the manufacturer showing you fully-formed products to choose from (a process that a technique like discrete choice conjoint analysis imitates), it's you telling the manufacturer what you want included in your product. In a sense you are building (or configuring) the product.

This process started out with products like computers that are more suited for this kind of consumer-driven building but is spreading to other areas, often quite unrelated. Now you can build your own clothes, shoes, credit cards, digital and entertainment services, insurance products, industrial equipment – the list goes on. And it will keep going on because the Internet is the central reality of our lives today. So, if consumers are increasingly inhabiting a world where they get to build their products, does it not make sense that research would be more realistic if it imitated that process to get better-quality information?

The answer is yes, of course. Because not only are we then keeping up with the reality of the marketplace, it also turns out that getting consumers to build their own products has other significant advantages. They will find the task more realistic and enjoyable – primarily because, unlike an approach like discrete choice conjoint, configuration is significantly less repetitive and tedious. By metaphorically looking over consumers' shoulders as they make choices, we are able to glean interesting information on how they make decisions. Conjoint analysis is generally what is called a decompositional approach. People tell you something about the whole product and you then derive what is important to them. Building your own product is a compositional approach because respondents to a study have to make explicit decisions at each stage and build their product one piece at a time. This latter approach increasingly makes sense in a world where people are in fact building their own products.

Getting consumers to build products is an idea that has been around for several years. Eric Von Hippel of MIT has been talking about it for the last couple of decades, waiting for technology to catch up to his thinking. The *Journal of Marketing Research* published a seminal article a decade ago on consumers making choices and how that data can be analyzed. Menu-based conjoint as a practical approach is increasingly becoming a reality. In this context, having consumers configure complex products and analyzing the data to get useful conjoint-like information should be of interest to managers in diverse industries.

Starts with the design phase

So, what actually happens in a configuration study? It starts with the all-important design phase, where an in-depth discussion of the product or service in question is needed. Every feature and option that a company wants to offer and that consumers may desire has to be listed out for potential inclusion in the study. If you don't ask, they can't tell you anything about it. The next and perhaps even more important step

Table 1: Auto Insurance Study Results

	Cost Difference ($)	% Choosing
Collision Deductible		
$500 Deductible (Base Product)	$0	59
$250 Deductible	$125	21
$1,000 Deductible	($37)	15
$2,000 Deductible	($115)	6
Bodily Injury Liability		
$15K/$30K (Base Product)	$0	56
$100K/$300K	$120	22
$300K/$750K	$160	12
$500K/$1.5MM	$200	10
Accident Forgiveness		
Not Available (Base Product)	$0	55
Premium Increase Only If At Fault	$25	25
No Increase For One Fault In 3 Years	$40	17
No Increase For Two Faults In 3 Years	$140	4
Policy Term		
6-Month Term (Base Product)	$0	63
1-Year Term	$50	24
2-Year Term	$100	13
Decreasing Collision Deductible		
Not Available (Base Product)	$0	47
1 Year No Accidents $50 less/max $250	$15	31
18 Months No Accidents $100 less/max $500	$25	22
Comprehensive Deductible		
$500 Deductible (Base Product)	$0	55
$250 Deductible	$19	30
$1,000 Deductible	$13	15

is the imposition of constraints. If you were building your laptop on a manufacturer's Web site and you knew you were going to get it for free, wouldn't you build your dream product with little regard for the real world? The same thing will happen in the research if you don't impose price (or other relevant) constraints on every option presented to respondents. In some industries this is straightforward. In others (such as insurance products) input from other internal departments is required to make numbers as accurate as possible. This is actually a useful situation as it gets more stakeholders involved with the study and makes them more receptive to the results.

There are a few more steps to finishing the design but these are the essential ones. Note that unlike in a discrete choice conjoint type of study there is no statistical underpinning to these designs. Such a feature is both an advantage of those methods (because of the efficiency) and a disadvantage (because of the reduced flexibility). A configuration study design has complexity, of course, but it is of a different variety and the flexibility of the design phase can be an order of magnitude higher. So, products with numerous complex interconnections (if color is red, shape cannot be round; if the plan is X then Feature Y cannot have Price Z, etc.) can be easily handled.

Programming creativity allows for an interesting and interactive experience for the respondent. It is easy to see why this kind of research is more enjoyable for respondents. At each stage the respondent picks the option to include and clearly-displayed price information makes the choice realistic. Running totals and options to make changes to the product allow respondents to design a product that fits the budget.

Results can be as simple as percentages of people who picked each option. This information is very useful and translates easily for managerial decision-making. Loads of additional information is available about the decisions people made at each step (and what that could mean), the most sought after options, the most frequent trade-ups and trade-downs – all in an easy-to-understand format. Respondents are effectively segmenting themselves based on their preferences but one could certainly segment them further in different ways. As mentioned before, more advanced analyses are also possible, leading to conjoint-type utilities and all their attendant advantages.

Auto insurance example

We'll use an auto insurance example to illustrate. The topic is interesting for a few different reasons. All drivers need it and most adults choose their own provider. It can be customized for a driver and it has some complexity built into the process, especially with regard to differential pricing. The decision-making may not be straightforward, with rules being used to arrive at an optimal product. It is often renewed every six months, providing an opportunity to revisit the decision-making process with somewhat high frequency. And, of course, it is quite suitable for a configuration exercise.

The study was set up as a task for choosing auto insurance for oneself. A basic product (largely hewing to state-mandated minimums) was described followed by the configuration exercise where respondents were offered choices on six features. Each feature had three to four options including a base option and respondents could choose to stay with the base product or shift to one of the other offered options. Some options would increase the total price while others would lead to a lower price. Given the customized pricing used in auto insurance, we kept the task realistic by asking respondents for their current expenditure and using that as a basis for building the price for the overall product. Respondents build their ideal product from the choices provided as they proceed through the exercise.

Basic results

Of the 822 respondents in the study only 20 percent chose the base option in every feature. In other words, the vast majority of study respondents chose to alter the base product to fit their specifications, showing both their inclination with regard to auto insurance and their level of engagement with the exercise. In every feature there are considerable proportions of people choosing to upgrade (and sometimes trade down) from the base product. For example, as shown in Table 1, with collision deductible, a fifth of respondents show a willingness to lower it down to $250 even though it adds $125 to the overall premium. Another fifth would rather lower their premium by choosing higher levels ($1,000 or $2,000) of collision deductibles.

Almost half of respondents opt for some form of accident forgiveness option while about that proportion indicate they would prefer policy terms longer than six months. In both cases respondents are showing that they are willing to pay for such amenities, thus providing an auto insurance company with valuable input on pricing these kinds of innovative features. Profiling people by the choices they make also provides interesting information. This is clarified more when we run a segmentation analysis on the choices that people make when building the product. Using a neural network-based segmentation method (called self-organizing maps) we can identify segments with clearly distinguishing characteristics:

- Segments are differentiated mainly based on deductible preferences.
- A somewhat smaller high-deductible segment of consumers who are relatively affluent, educated and younger. They are much more interested in unusual offers like very high deductibles and more likely to indicate a willingness to buy the product that they have built.
- A low-deductible segment that is older, almost as affluent, has more children, generally prefers dealing with an agent and doesn't use the Internet to shop as much. Unusually low deductibles are especially attractive to this group, perhaps because they are more risk-averse than other segments.
- There are also segments which tend to go with the base product offer and don't show much inclination to customize the product. They do have some clear differences among them in terms of variables like accident forgiveness but it is clear that they are quite different from those who seek high or low deductibles.

Advanced modeling

The primary information that comes from a configuration exercise is simple, intuitive and very useful. But we don't have to stop there. Advanced econometric modeling can be applied to the data to draw out conjoint-like insights even though the design is not set up accordingly. While the problem is quite complex because of the design flexibility, it is possible to derive individual-level utilities or attractiveness scores for every option in every feature using hierarchical Bayesian estimation and we were able to do that in this case. Of course, this provides the same level of flexibility on the back end that has been the hallmark of conjoint designs. In essence, we overcome the front-end design constraints of conjoint while availing ourselves of its back-end flexibility.

In our experience across several

industries, it is possible but harder to generate individual-level utilities with these data compared to conjoint data. The reason is simple: Conjoint analysis uses an experimental design upfront to ensure that all options are viewed an appropriate number of times, while the input in this case is much more chaotic as it depends on the whims of individual respondents. However, our experience is that when validation tasks are included it is possible to obtain hit rates that are generally comparable to what can be seen in conjoint designs. Of course, a proper one-to-one comparison may not be possible as each method is usually appropriate for different problems and the design discipline of conjoint is always going to be an advantage. But given the design flexibility enjoyed by the configuration exercise, the ability to get good-quality utilities (along with all the other information) makes it a good way to tackle problems that can be too complex for other approaches.

So what does it practically mean to have individual-level utilities? Since utilities express the desirability of every option for every respondent, we can make calculations like take-rates of any product we choose to design or preference shares of any groups of products. We don't have to restrict ourselves to only products that were actually designed by respondents. Since individual-level preferences are now available, any product combination from the universe of possibilities (often running into tens of thousands of products) can be created.

For example, if a high-deductible product and a low-deductible product with varying levels of accident forgiveness and policy terms were introduced, how would the market react to it? Which demographic groups would be more likely to choose one over the other? Who are the people who prefer high bodily injury liabilities? All these kinds of questions can be answered because we now know preferences at the individual respondent level. In fact, we can build a custom simulator that would allow all these scenarios to be played out to get a full understanding of how consumers make choices in the market place.

For simplicity, this example uses only six features and three to four levels per feature. In reality, the configuration exercise can handle far more features and levels, bounded only by respondent engagement and the ability to develop price constraints. And of course, this method can be applied in a variety of industries.

Likely to resonate

Product configuration is a deceptively simple and engaging way of gathering information from consumers by having them build their ideal product. In the process of building they provide considerable insight into their preferences, allowing companies to design products that are much more likely to resonate in the marketplace. In specific situations this method has the potential to surpass existing methods of preference elicitation (such as discrete choice conjoint) while at the same time providing an engaging and enjoyable experience for the respondent.

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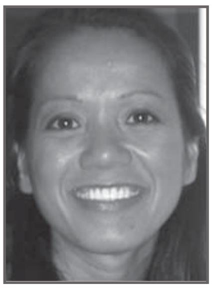
Names of Note

In Memoriam...

George Gallup Jr., former co-chairman of *Gallup Poll*, Washington, D.C., died in November 2011 at age 81.

Alex Gofman, vice president and CTO of White Plains, N.Y., research firm *Moskowitz Jacobs Inc.*, died in December 2011 at age 54.

Joseph Farrell, founder, chairman and CEO of *National Research Group Inc.*, Los Angeles, died in December 2011 at age 76. Farrell is credited with introducing market testing to Hollywood.


Endrina


Hamidon

■ Kuala Lumpur, Malaysia, research company *Pulse Group PLC*, has appointed **Carmen Endrina** to lead its West Coast client development division in the U.S. Additionally, the company has appointed **Wiryadi Hamidon** to serve as head of client development and government liaisons from Pulse's Singapore office.

■ *TRC Market Research*, Fort Washington, Pa., has hired **Patricia Camp** as research director.

■ New York research company *TNS* has named **James May** executive vice president, Southeast. May will be based in Atlanta. TNS has also hired **Rebecca Wynberg** as CEO of the company's qualitative business in the U.K.

■ **Matthias Hartmann** has been named CEO of Nuremberg, Germany, research company *GfK SE*.

■ *Bell Falla and Associates*, a Norwalk, Conn., research company, has hired **Gwen Santer** as senior vice president, pharmaceutical marketing research.


Gantt

■ **Brian Gantt** has joined Norcross, Ga., research company *The Marketing Workshop Inc.* as senior research manager.


Pink

■ Encino, Calif., research company *uSamp* has appointed **Joshua Pink** as senior vice president, corporate sales strategy and global development; and **Justin Wheeler** as vice president and general manager to lead global operations for SurveyBuilder.

■ *Radius Global Market Research*, New York, has promoted **Shira Horn** to vice president, business development. The company has also hired **Glenn Staada** as vice president, business development.

■ **Annabel Kelly** has joined Reston, Va., research company *Heart+Mind Strategies* as senior solutions consultant.

■ Framingham, Mass., research company *Kadence International* has appointed **Lelia Leong** as associate insight director at its Malaysia office.

■ Dallas research company *Toluna* has named **Jim Fredrickson** group COO of its Wilton, Conn., office.

■ New York researcher *The Nielsen Company* has appointed **Rick Kash** vice chairman and **Mitchell Habib** COO.

■ **Liz Granahan** has been promoted to president of Fort Washington, Pa., research company *Focus Forward LLC*.


Kaisner


Conder


Ellis

■ *Gongos Research*, Auburn Hills, Mich., has promoted **Curtis Kaisner** to director, qualitative research. The company has also hired **Sarah Conder** and **Michelle Ellis** as moderators.

■ *Phoenix Marketing International*, a Rhinebeck, N.Y., research company, has hired **Ellen Sills-Levy** as senior vice president. Sills-Levy will be based in New York.

■ **Jeff Kerr** has been promoted to senior vice president, consumer research, at *Peryam & Kroll Research*, Chicago.

■ *ICM Research*, London, has hired **Tom Bailey** as head of analytics; **Ruth Moyer** as research director, technology; and **Matt Draper** as research director, financial services.

■ **Joel Schindler** has joined the executive team of *MarketVision Research*, Cincinnati. Schindler will be based in New Jersey.

■ **Henry Gazay**, CEO of Miami research company *Medimix International*, has been named to the board of directors of University of Georgia Marketing Research Institute International, Athens, Ga.

■ Reston, Va., research company *comScore Inc.* has named **Bert Miklosi** vice president, marketing solutions, consumer packaged goods.

■ **Doug Schorr** has been named head of consumer research for *Beachbody LLC*, a Beverly Hills, Calif., fitness company.

■ Burlington, Mass., research company *iKnowtion* has hired **Niren Sirohi** as vice president, predictive analytics.

■ Paris research company *Ipsos* has appointed **Grant Bertoli** as CEO, Southeast Asia; and **Miranda Cheung** as managing director, Ipsos in Singapore and Southeast Asia.

Separately, *Ipsos MORI*, London, has made the following appointments: **Ben Page**, chief executive; **Simon Atkinson**, assistant chief executive; **Susan Malcolm**, managing director, marketing; **Dave Hannay**, head of market understanding and measurement; **Susan Malcolm**, head of innovation and forecasting; **Hilary Worton**, head of health; **Paul Stamper**, head of qualitative; **Deborah McCrudden**, managing director, advertising; **Bobby Duffy**, managing director, public affairs; **Liz Landy**, managing director, MediaCT; **Niall Rae**, managing director, Loyalty; **Yusuf Ramada**, managing director, operations.

Bertoli

Cheung

■ **John Stermer** has been named executive vice president, business development, of Cincinnati research company *Nielsen Catalina Solutions*.

■ Northumberland, U.K., research company *Panelbase* has appointed **Andrew Pringle** as manager, client development, at the company's London office.

■ **Lee Gazey** has joined New York research company *Hall & Partners* as a partner in the health business.

Research Industry News

News notes

■ In November 2011, Columbia, Md., research company **Arbitron Inc.** filed suit against **Magic Broadcasting**, Dothan, Ala., for breach of contract, claiming that Magic Broadcasting continued use of Arbitron's copyrighted reports after the expiration of a subscription agreement. Arbitron claims that Magic has not been a subscriber since March 31, 2010. A pre-trial conference is set for later this month.

■ Ann Arbor, Mich., research company **ForeSee Results** has reached an omnibus litigation settlement with Marshall, Texas, patent licensing company **Lodsys**. Lodsys had claimed ForeSee's online survey software infringed its patents. ForeSee initiated a declaratory lawsuit in June 2011, alleging that Lodsys threatened ForeSee clients.

■ In December 2011, New York researcher **The Nielsen Company** and Reston, Va., research company **comScore Inc.** settled their patent disputes by entering into a cross-licensing agreement. Subject to retained rights by Nielsen, comScore will acquire ownership of the four Nielsen families of patents asserted in litigation. ComScore also grants Nielsen worldwide licenses for the families of the four patents comScore asserted in litigation. Both parties agree not to bring any patent action against the other for the next three years. In addition, Nielsen has acquired approximately $19 million in comScore restricted common stock with neutral voting requirements, which Nielsen has agreed to hold for a period of one year minimum.

■ In November 2011, **Polaris Marketing Research Inc.**, Atlanta, reported that it had been victimized by a widespread mail scam. A company falsely claiming to be Polaris Marketing Research has been trying to recruit mystery shoppers by sending consumers a check for nearly $2,000 as an enticement. Consumers receiving this offering in the mail should not respond, according to the United States Postal Inspection Service.

■ Waltham, Mass., research company **Affinnova Inc.** has announced plans to hire up to 70 new staff members in 2012.

Acquisitions/transactions

■ Dublin, Ireland, research company **Experian** has acquired U.K. Web monitoring firm **Garlik Limited**. The acquisition is intended to extend Experian's presence in identity protection.

■ Fort Worth, Texas, investment firm **TPG Growth** and Palo Alto, Calif., research software company **SurveyMonkey** have agreed to acquire San Francisco research company **MarketTools Inc.** TPG will acquire MarketTools and transfer the Zoomerang, ZoomPanel and TrueSample businesses to SurveyMonkey in exchange for a minority stake in SurveyMonkey. TPG will separately retain and expand the research solutions and CustomerSat businesses.

■ Herndon, Va., research company **Vovici** has been acquired by Melville, N.Y., software company **Verint**. Vovici has added Verint's Impact 360 Text Analytics to its enterprise feedback management solution.

■ **Leger Marketing**, a Montreal research company, has acquired Zurich, Switzerland, research company **Isopublic** and its subsidiary **Gallup Switzerland**.

■ **The GfK Group**, a Nuremberg, Germany, research company, has acquired Menlo Park, Calif., research company **Knowledge Networks Inc.**

■ Paris research company **Ipsos** has acquired **Consumer Behavior & Insight** (CBI) in Vietnam. CBI will combine with Synovate Vietnam to become Ipsos Vietnam. CBI Founder Nguyen Minh Tan has been named managing director of the operation.

■ Edison, N.J., research company **Schlesinger Associates** has acquired German research company **Schmiedl Marktforschung GmbH**. Schmiedl has locations in Berlin, Frankfurt and Munich, which will continue to be overseen by Schmiedl's managing directors.

■ Research company **Tealeaf** has acquired research company **Overstat Inc.** Both companies are based in San Francisco.

Alliances/strategic partnerships

■ Paris research company **Ipsos** has made a strategic investment in **AdMaster**, making it an exclusive partner of Ipsos when providing online advertising research technology in China and other Asia-Pacific countries.

■ Research companies **Synovate Retail Performance**, Milton Keynes, U.K., and **Track & Trace AS**, Norway, have partnered to combine Synovate's insight into shopper behavior and the customer experience with Track & Trace's solutions for measuring customer flow and shopping behavior.

■ Research companies **BDRC Group**, London, and **Jones Donald Strategy Partners**, Sydney, Australia, have formed an equity-based alliance to formalize their relationship for sharing ideas and resources.

■ Stockholm, Sweden, research technology company **Tobii Technology** has partnered with Harrison, N.Y., research company **Friedman Consumer Opinion Centers** to combine Tobii insights and Friedman data collection services. Under the agreement, Tobii will support Friedman in each of the research agency's 16 Consumer Opinion Centers across the U.S.

Awards/rankings

■ Encino, Calif., research company **uSamp** has been ranked 11th among the top-100 privately-held companies on *Forbes Magazine*'s list of America's Most Promising Companies.

New accounts/projects

■ Nuremberg, Germany, research company **The GfK Group** has selected Portland, Ore., research company **Revelation Inc.** as its technology provider for GfK SocioLog.dx, GfK's online qualitative research solution.

Additionally, GfK has signed a global agreement with **Dapresy**, a Norrkoping, Sweden, research software company, making Dapresy Pro GfK's recommended solution for online reporting throughout the company.

Finally, GfK has been awarded six new contracts in Central and Eastern Europe, delivering audience measurement data for a range of media in Romania, the Ukraine, Belarus and Russia.

■ **Aegis Media North America**, New York, has adopted Portland, Ore., research company **Rentrak Corporation's** TV Essentials and Exact Commercial Ratings data.

■ **MarketView Research**, Edgewater, N.J., has selected Cambridge, Mass., research company **iMotions'** Attention Tool as its eye-tracking software platform.

■ Stamford, Conn., research company **InsightExpress** has been selected by Chicago communications company **VivaKi** as its research partner. InsightExpress will measure advertising effectiveness on tablet devices as part of the most recent wave of The Pool, VivaKi's consumer-driven advertising research program.

■ **VideoHub**, a New York advertising solutions company, and New York researcher **The Nielsen Company** have partnered to offer VideoHub customers access to Nielsen Online Campaign Ratings gross rating points (GRPs) via VideoHub for Advertisers. The relationship marks the first time Nielsen has integrated its GRP data with an online video advertising platform.

New companies/new divisions/relocations/expansions

■ Copenhagen, Denmark, research company **Adform** has opened an office in Madrid, Spain. Miguel Fernandez-Gil Martin will lead the operation as manager, business development.

■ Digital marketing specialist Steve Pritchard has opened **threeten10**, a social media tracking agency in Leeds, U.K. The company is online at www.threeten10.com.

■ Paris research company **Ipsos** has opened a research agency in Pakistan, managed by Abdul Sattar Babar.

■ Milwaukee research company **Market Probe International** has moved its corporate headquarters to New York. Phone, fax and e-mail addresses will remain the same.

■ Horsham, Pa., research company **Marketing Systems Group** has relocated its corporate offices to 755 Business Center Dr., Suite 200, Horsham, Pa.

■ **G & S Research**, Indianapolis, has relocated to new headquarters in The Precedent Business Park in Indianapolis.

■ **Insight Research Group**, New York, has rebranded as Insight Strategy Group. The firm is online at www.insightstrategygroup.com.

Research company earnings/financial news

■ London media company **WPP** has made an investment in London mobile software company **Lumi Technologies Limited**, taking a minority equity stake in the business.

■ San Francisco social media analytics company **awe.sm** has announced a $4 million Series A financing round led by Foundry Group, Boulder, Colo., and GRP Partners, Los Angeles.

CALENDAR OF EVENTS

••• can't-miss activities

featured

Research Innovation and ROI and **Quirk's Marketing Research Review** will hold a 90-minute training Webinar, themed "How to quantify the ROI of research," on February 15 at 11:30 a.m. CST. Brett Hagins will present. The cost to attend is $199. The first five registrations will receive the Demonstrating ROI Guidebook, a 19-page Word document, at no additional charge. For more information visit http://quirks.webex.com.

The Qualitative Research Division of Canada's **Marketing Research and Intelligence Association** will hold its annual conference on February 24 at the Ontario Science Center. For more information visit www.mria-arim.ca/qrdconference2012/news/default.asp.

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. For more information visit www.msmralumni.org.

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.

ESOMAR will hold its annual Central and Eastern European research forum, themed "Global Fuel for Local Boost!", on March 26-27 in Krakow, Poland. For more information visit www.esomar.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 information 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 30-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.

IIR will hold its audience measurement event on May 21-23 at the Radisson Blu Aqua Hotel in Chicago. For more information visit www.iirusa.com/audience.

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 **Marketing Research and Intelligence Association** will hold its annual conference on May 30-June 1 in St. John's, Newfoundland. For more information visit www.mria-arim.ca.

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.

2012 Research Software Directory

The 2012 Directory of Marketing Research Software was compiled by sending listing forms to companies we identified as producers/vendors of marketing research-related software. This year's directory lists over 150 firms and over 360 software titles. The software firms are arranged alphabetically. Along with the company's vital information, we've also included the title(s) of the software they sell.

To make finding software easier, we have added a section of cross-references in which providers are grouped by solution capability.

A searchable version of this directory is available on our Web site at www.quirks.com

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(See advertisement on p. 63)

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Bellmawr, NJ
Ph. 856-931-5780
webinfo@easidemographics.com
www.easidemographics.com
Software:
The Rite Site

EasyGoingSurvey.com
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Ph. 34-91-416-4609
CustomerService@EasyGoingSurvey.com
www.easygoingsurvey.com
David Crow
Software:
EasyGoingSurvey

Empathica Inc.
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Ph. 888-633-1633 or 905-542-9001
info@empathica.com
www.empathica.com
Steve Prodger, V.P., Strategic Accounts
Software:
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(See advertisement on p. 41)

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Reply

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info@focusvision.com
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Software:
FocusVision InterVu
FocusVision Video Streaming

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Karen Jeffrey, Ph.D., President
Software:
ForAllSurveys

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Horsham, PA
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(See advertisement on p. 67)

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Software:
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Software:
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www.hlanalysis.com
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Software:
TestKit

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salesbox@us.ibm.com
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Wynn Hartley, Marketing Director
Software:
Inquisite Survey

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Jennifer Dale
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Software:
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Rudy Bublitz, Vice-President, Client Development
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(See advertisement on p. 22)

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Software:
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Location Panel

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Scott Wellman, President
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LogicDepot Feedback

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Software:
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Software:
MRDCL
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Alan Lambert
Software:
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(See advertisement on p. 67)

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Jonas Selz
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MM4XL 9.0

MarketSight LLC
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Research Tracker II
Research Tracker II for Medical Respondents

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Charles Boyar, Vice President
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Andras Huller
Software:
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Software:
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Ph. 801-546-0445
sales@ncss.com
www.ncss.com
Jerry Hintze
Software:
NCSS

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Ezequiel Lukin, Director
Software:
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Ian Roberts
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Dub InterViewer
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New York, NY
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ObjectPlanet AS
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Software:
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Software:
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john.harrison@oscworld.com
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Matilda Sarah
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Ros Biggs, Director
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QPSMR Companion
QPSMR Input
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www.qqqsoftware.com
Pamela Weeks, President
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TPL Tables

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Rob Calcagni
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(See advertisement on p. 9)

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(See advertisement on p. 71)

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www.sawtooth.com
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Software:
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WinCATI
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Software:
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Software:
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Integrated Survey Software Solutions

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A Netflix envelope may provoke a discussion about movies that has nothing to do with the product at issue but may say volumes about the family's tastes.

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"If they see AARP, they won't think it's appropriate for someone their age."

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Hispanic women use the fit of their clothes, rather than a scale, as a gauge of their overall health and fitness.

We get around

Quirk's is going to be at more conferences than ever in 2012! We will serve as a media partner for both the ARF's annual Re:think convention and expo, March 25-28 in New York and The Market Research Technology Event, April 30-May 2 in Las Vegas. We will also have representatives at the PMRG's national conference on March 25-27 in Orlando, Fla. Beyond the usual slate of research industry events, we have also been asked to have a presence at eTail Palm Springs in Palm Desert, Calif., February 27-March 1; at Marketing 360 Exchange West in San Francisco, March 4-6; and at Next Generation Customer Experience in Las Vegas, March 26-28. It's not too late to register for these events! Simply visit our online calendar at www.quirks.com/events.

Research Industry Voices blog: vetted, edited and aggregated

Have you checked out our Research Industry Voices Blog recently? We've started updating it more frequently, adding blog posts that we think are the best of the Web in addition to publishing original content. Whether you're on the client or supplier side, if you would like to submit a guest blog post, contact Quirk's Editor Joe Rydholm at joe@quirks.com.

WIN ••• WIN ••• WIN ••• WIN ••• WIN

Free registration to the American Marketing Association's Applied Research Methods event – a $2,550 value!

The American Marketing Association (AMA) is offering one complimentary registration for its Applied Research Methods event on April 16-18 in Las Vegas. This event is an intensive, customized learning experience, focused on practical applications and readily-implemented solutions in marketing research. The prize includes the registration fee and a customized tutorial portfolio. The package value ranges from $1,650 to $2,550.

For more information visit www.marketingpower.com/arm.

To register, send an e-mail to contest@quirks.com with your complete contact information. Please include "AMA Contest" in the subject line. Deadline to enter is February 29, 2012. The winners will be selected at random and announced in the April issue of *Quirk's*.

Congratulations to December's winner, Teri Woodruff of The Principal Financial Group, Des Moines, Iowa. December's prize was $1,500 off facility + recruit at any Fieldwork location!