

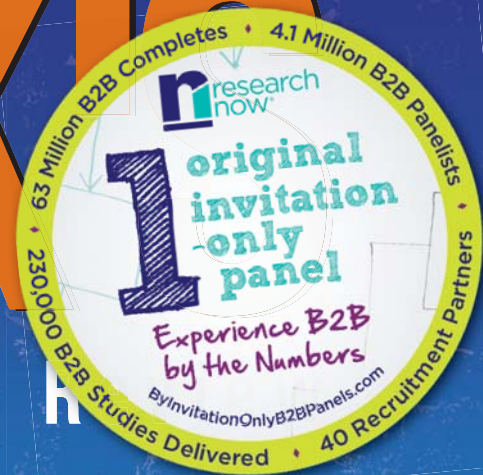
Sthanunathan on the future of research

The value of a good screener

Research salary survey results

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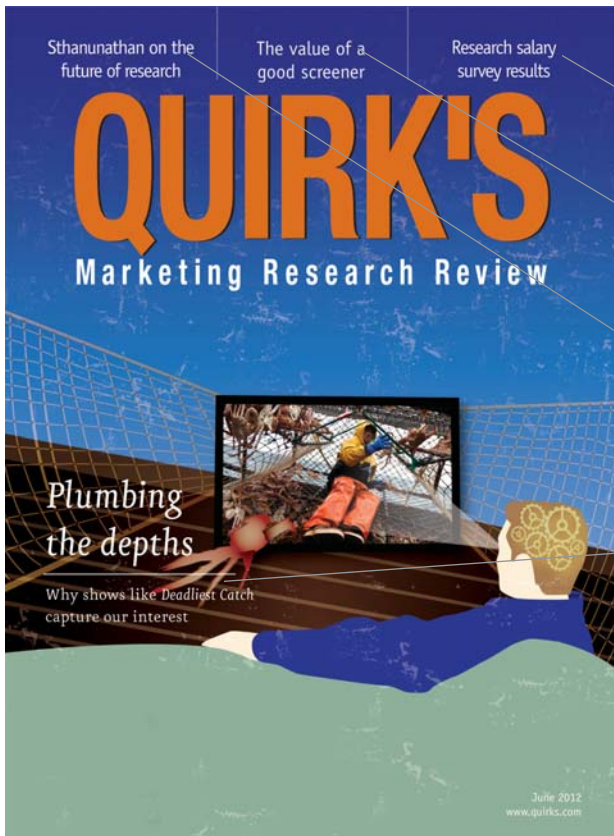
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... social media

Have something to say? Quirks.com adds Facebook Comments



Facebook Comments is a social media plug-in that allows users to comment on Quirk's articles, event postings, multimedia and directory listings using their Facebook profile. In addition to ensuring a commenter's true identity (no trolls allowed!), linking comments to Facebook also aims to simplify comment-sharing on personal Facebook News Feeds,

which in turn links back to the discussion on Quirk's. We hope this new commenting feature will encourage active dialogue with and among our audience!

... directories

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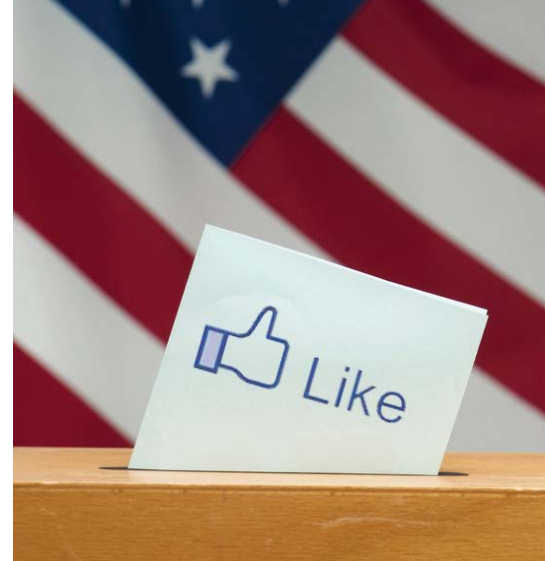
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In Case You Missed It

news and notes on marketing and research



●●● consumer psychology

Shoppers trying to save spend more

Setting a price limit when shopping often backfires, according to research from marketing professors at Brigham Young University, Provo, Utah, and Emory University, Atlanta. The researchers found that consumers with a price in mind spent up to 50 percent more when they started shopping than those who didn't. The findings were so counterintuitive that the researchers tested them with six separate experiments – and the results held up each time.

Experiments tested consumers' thinking about buying televisions, pens, laptops, earbuds, garage doors, mattresses, Blu-ray players and luggage.

Shoppers could select a target price from a set of choices, identify their own target price, select a maximum price they were willing to pay or determine a budget for a specific purchase.

When consumers start off the purchasing decision process with price in mind, they first narrow down their options based on price. If they decide to spend \$500 on a new TV, they look only at TVs in that price range.

Of course, they then notice that higher-priced sets within that range have more features and better quality and lean toward those. After consumers screen their choices based on price, they essentially ignore price and focus on quality – and better-quality products usually cost more.

In another experiment, research subjects were given \$6 for participating in the study and given an option to purchase a steeply-discounted pen on their way out. Those who were asked how much they planned to pay spent an average of \$2.10, compared to the average of \$1.64 spent by those who were not asked.

But rest assured, aggregate budgets still achieve their intended result. It's only when consumers focus on purchasing one specific product that budgeting can backfire.



●●● political research

Can social media buzz win elections?

From YouTube debates and candidate Facebook pages to sharing breaking news via Twitter, the impact of social media is already well noted by candidates running for political office. But does activity in social media influence voters during an election? As candidates prepare their social media strategies for the 2012 elections, NM Incite, the social media intelligence division of New York researcher The Nielsen Company, took a look back at four races during the 2010 midterm elections to measure the impact of social media on voters.

In three out of four races, the candidate most frequently mentioned on social media won the seat. However, the share of online buzz for each winning candidate was often higher than their percent of votes, demonstrating a strong correlation but not necessarily a causal relationship between social media and election results.

Overall voter turnout during the 2010 midterm election was higher on average compared to prior midterm elections but buzz doesn't appear to be a driver of voter turnout. In fact, the two states with higher levels of voter turnout also had the lower levels of online buzz about their candidates.

In each contest, online buzz followed a specific pattern: high buzz immediately following their primaries, followed by a period of fewer social media mentions, with buzz peaking during the week leading up to Election Day.

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Coke's Sthanunathan charts the future of research

Conference-going can be a draining experience. Sure, the learning is exhilarating and it's always great to (re) connect with friends and colleagues, but when the speakers aren't especially informative or engaging, or when the title of a presentation ends up having little to do with the speaker's actual focus (what is up with that, BTW?), the process quickly loses whatever excitement it initially held when you scanned the list of talks you wanted to attend.

But then a guy like Stan Sthanunathan comes along and makes it all better.

The always-quotable, always-substantive vice president of marketing strategy and insights at Coca-Cola delivered the goods last month at The Market Research Technology Event in Las Vegas. As part of a wide-ranging talk on the impact of technology on research, which included his thoughts on some more immediate realities facing researchers, he also offered some predictions for research in the year 2020.

What I always appreciate about his appearances, whether on a panel or as a featured speaker, is his ability to exhort without scolding, to enlighten without condescending, to alert without grandstanding. And despite his position at a \$175 billion company, his ideas and insights have import and relevance to

organizations of all sizes and on both sides of the client/vendor spectrum.

So where are things headed? Here are a few of his predictions:

> Focus groups will go virtual. "The days of recruiting people and bringing them to a hostile environment will be gone," he said.

> As biometrics become mainstream, asking questions to get answers will almost be history.

> A list of the top five research agencies will have three new entrants that weren't traditionally or previously there, such as Facebook, Google or a consulting firm like McKinsey & Company.

> Mobile will be the primary way of collecting data, thanks to ever-growing and -improving cell phone access around the world.

> Television rating points will turn into connection rating points (CRPs).

> Technology vs. privacy battles will be bigger and more frequent.

> Random sampling will die.

> Situational research will become the new mainstream. It's more effective to gather shopper insights while people are shopping, he said, as opposed to two weeks later.

> The next wave of researchers will come from the so-called digital natives, those most immersed in technology, who have never known anything but our always-on lifestyles. Thus, as a profession, marketing research will have to compete for this new talent with the Googles of the world and make an attractive case that a career in marketing



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Joe Rydholm can be reached at joe@quirks.com

research is as desirable as one in a more stereotypically tech-focused industry.

New skill sets

To stay relevant in this changing world, researchers will need new skill sets, he said, and move from: striving for precision to greater comfort with higher levels of ambiguity; being focused on statistical significance to being skilled at making deductions; a conclusive mind-set to an exploratory mind-set; analysis to synthesis (data and the analysis of it will become commoditized and thus the ability to synthesize data from disparate sources will be important); viewing technology as a driver rather than just an enabler; and delivering presentations to delivering visualizations and realizations.

Dreaded trio

As if things weren't difficult enough, against this backdrop of dizzying change, the better-faster-cheaper drumbeat isn't going away. To keep the research function relevant, he said, we need to resign ourselves to the fact that delivering some combination of that dreaded trio the only option going forward.



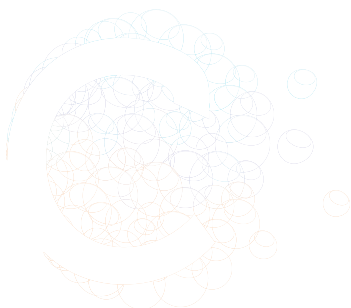
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A scene from a horror movie

| By Art Shulman

snapshot

True-life tales
in marketing
research.

Susan Fader of Fader & Associates tells about falling asleep in her hotel room after a long day of research and being woken up by a baby's muffled cries of, "Mama, mama." The room was pitch black. At first, she didn't know where she was or where the sound was coming from. She felt like she was in a scene from a horror movie.

Finally she realized what had happened. Her research project involved talking dolls and it seems that in transporting the prototypes from one market to the next, one doll's switch had been turned on.

From then on Fader took the batteries out of the prototypes when they bunked with her for the night.

Jim Nelems of The Marketing Workshop tells about a focus group he moderated where one participant looked very distressed. When the hostess asked what was wrong, the man said, "My wife just died this morning, but I promised to come in so I did."

The man was paid his incentive and excused for the day.

In another focus group Nelems was involved with, respondents were screened for recent or current employment in restaurants. Nelems did not think to screen for "people who applied for a job at restaurant and were turned down" but that's just what had happened to one participant shortly before coming to the group. During the group, somewhat drunk, he began shouting out the name of the restaurant and the person who turned him down.

The person who turned him down was, in fact, behind the mirror in the observation room.

The hostess was instructed to tell the participant he had a phone call. Because he was drunk,



@!/?#*&%


he did not stop to wonder how someone had the phone number of the group facility to call him there. Once removed from the group he was given his incentive and excused, never to return.

A researcher who prefers anonymity reports that during a focus group session, the moderator was using a flip chart to make lists of responses to various questions. When moving on to the next topic, she flipped a page up to get to a new sheet and continued on.

After a couple of minutes, those in the backroom noticed respondents sniffing the air. Turns out the flipped page had gotten stuck against a light and caught on fire. The valiant moderator knocked the flip chart to the ground, stamped out the fire, replaced the flip chart and carried on as if nothing had happened.

This same researcher reports that near the end of a different focus group, the moderator went to the backroom to see if the client had any additional questions. Since this was common practice, she just opened the door and started to step in. She quickly realized that her clients were totally unaware of either what was happening with the focus group or her presence in the room because they were passionately attending to each other.

She quietly closed the door, knocked on it as loudly as she could and waited for a response before reopening it.

Who says market researchers don't understand true love? 

Art Shulman is president of Shulman Research, Van Nuys, Calif. Send your tales of research-related wackiness to him at artshulman@aol.com. Contributors may remain anonymous.



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// Survey Monitor



and recommendation, company perceptions explain 60 percent of these behaviors, with product perceptions only accounting for 40 percent. www.reputationinstitute.com



••• brand research

Cereal killer

General Mills unseats Amazon in 2012 company rankings

In 2011, two 1990s Internet darlings took home top honors in reputation rankings – Amazon in the U.S. and Google globally – but food and beverage and consumer product companies have soared back to the top of the heap, according to Reputation Institute, a New York reputation management consultancy.

Reputation Institute has released the findings of its 2012 U.S. RepTrak Pulse, a study that measures the 150 largest U.S. public companies. General Mills ranked No. 1 in the study with a Pulse score of 83 after narrowly missing the top 10 in 2010 and 2011. The company scored strongest in three key drivers of reputation – products and services, governance and leadership – and was also No. 1 in citizenship.

The U.S. top 10 was filled with

competitors from the grocery aisles (with No. 1 General Mills, No. 2 Kraft and No. 4 Kellogg's all in the top five), cola wars (Coca-Cola No. 7 and PepsiCo No. 9) and tablets/e-readers (Amazon No. 5 and Apple No. 8), as well as perennial top-10 companies like Johnson & Johnson (No. 3) and UPS (No. 6). Perhaps the most interesting new entrant was Procter & Gamble – from No. 21 last year to No. 10 this year. P&G only began publicly using its corporate brand in the U.S. for the first time around the 2010 Winter Olympics.

Since 2009, U.S. companies have been competing in a new reputation economy, where who they are matters even more than what they produce. Framing this in the context of critical consumer behaviors, including purchase consideration, loyalty

••• retailing

Grocery list: whine and cheese

Consumers' fave supermarkets make it fast, easy, fair

Wegmans, Trader Joe's, Publix and Fareway are rated tops among 52 of the nation's major grocery stores, according to a study from *Consumer Reports*, Yonkers, N.Y. While most respondents were quite satisfied with their experiences, even some of the high-rated chains gave plenty of shoppers something to complain about. One-third of subscribers surveyed said they had given the heave-ho to a nearby grocery store. Forty-three percent changed their grocer in search of lower prices; about 25 percent cited poor selection, long lines or lousy food; 17 percent blamed employee rudeness; and 14 percent cited the crowds.

More than half of respondents

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had at least one complaint about their current store; almost a third cited two or more. The biggest gripe overall: not enough open checkouts (27 percent of shoppers), followed by congested or cluttered aisles and advertised specials that were out of stock. Other irritants included inept bagging, missing prices and scanner overcharges.

No chains tried their customers' patience more than Walmart Supercenter, Pathmark (Northeast) and Pick 'n Save (Wisconsin), where roughly three-fourths of shoppers had one or more problems. Shoppers who frequented Walmart were most likely to be miffed about the lack of open checkouts, out-of-stock regular items, indifferent employees, spotty pricing and confusing store layout. Thirteen percent of respondents shopping at Pathmark said they'd been overcharged, almost twice the average rate in the survey.

Fortunately, most consumers have several shopping choices and some supermarkets gave customers much of what they want. Costco, Trader Joe's, Fareway (Midwest) and Wegmans offer quality meat and produce, a clean shopping environment and very good or exceptional prices. All but Costco also earned the highest possible marks for service, defined as employee courtesy and checkout speed. Service is minimal at warehouse clubs such as Costco and lengthy lines are a trade-off for day-in, day-out deals.

www.consumerreports.org



●●● retailing
**One device,
many uses**

Consumers rely on mobile devices for in-store multitasking

Consumers engage in a wide range of product research activities when equipped with their mobile phones in a retail store. According to a survey by ClickIQ, a Minneapolis research firm, the majority of respondents said they accessed the Internet to research the product (61 percent), while one-quarter reported scanning UPS bar codes and 18 percent said they had scanned QR codes. Social activities also figured into the equation: 11 percent sent a text; 8 percent an image to a family member or friend; 11 percent called a family member or friend; and 7 percent called a different retailer than the one where they were shopping.

Respondents qualified for the survey by having researched a product in the past three months using their device while at a brick-and-mortar store and since purchased the product.

Price was easily the most-researched piece of information, cited by 82 percent of respondents. Half read online product reviews, while a significant proportion also compared features (45 percent) and checked availability (38 percent). More than one-quarter checked to see what shipping or delivery fees would be

incurred by purchasing the product online rather than in the store.

Most respondents also based their final purchase on price: two-thirds said price was the determining factor in where they made their final purchase. Availability (14 percent), features (8 percent), free shipping (7 percent) and already being at a store (4 percent) trailed as determining factors.

The most popular Internet searches included going to online-only retailers and accessing the manufacturer's Web site of the product they were searching, both at 43 percent. Almost two-fifths visited the online Web site of a retailer that also has brick-and-mortar stores but not necessarily the retailer where they were.

www.clickiq.com



●●● coupon research
**More saving,
more spending**

The buying power of digital couponers

Digital coupon users shop more frequently and spend significantly more during each trip than the average U.S. consumer, according to a study conducted by GfK Knowledge Networks, a New York research company, on behalf of Coupons.com, Mountain View, Calif. The study evaluated the shopping behavior of over 200,000 households that use digital coupons. These households were identified as having redeemed coupon(s) sourced from Coupons.com or other Web sites



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in Coupons.com's network. Shopping behavior was compared to the households in the GfK Knowledge Networks National Shopper Lab.

Digital coupon users make 22 percent more shopping trips per year than the average shopper (69 vs. 57 trips per year, respectively) and spend 23 percent more per shopping trip than the average shopper (\$55.05 vs. \$44.87 per trip, respectively). Digital coupon users also spend 49 percent more per year than the average shopper (\$3,803 vs. \$2,545 per year, respectively).

Over 60 percent of visitors to Coupons.com planned to visit a grocery store within two days of printing coupons or saving them to a loyalty card and 43 percent planned to shop within the next 24 hours.

www.coupons.com



●●● social research Be the change

Americans are wary of but invested in the future of their communities

Many Americans are uncertain of what the future holds for their communities but are committed to making their communities

better and want to get involved, take action and make a difference. Although 60 percent would move away from their community right now if they could, when asked who has the greatest opportunity and responsibility to make a difference in improving the quality of life in their community, half of the respondents reported "me, my family and other members of our community," according to a survey conducted by Wilton, Conn., research company Toluna Greenfield Online on behalf of YMCA of the USA, Chicago.

The survey examined how Americans rate their communities in terms of core strength drivers, including types of community involvement; healthy active lifestyles; education, youth and family life; and quality community services.

Many Americans are still concerned about the quality of life in their communities and are not confident their communities will rebound. In fact, when asked to grade their communities' strength, respondents gave an average rating of B-. In addition, Americans want communities that are safer, cleaner, offer access to more public health clinics and show a stronger commitment to improving children's nutrition and overall health and wellness. A safe environment ranked as the most important quality in building a strong community and over three-fourths say they are concerned about crime in their community.

Americans are putting more responsibility on local governments and themselves to impact change. Unfortunately, the vast majority of respondents (72 percent) reported that budget cuts by government, social services and nonprofit community organizations have had a negative impact on themselves and their families, with 22 percent saying they've felt a big negative impact. In response, almost two-thirds of respondents say they will get more involved in their commu-

nities this year and will contribute goods, services, facilities or other non-monetary resources to a worthy cause or organization.

www.ymca.net



●●● health care research Send it to me

Health care professionals prefer e-mailed new product info

Sixty percent of health care professionals prefer e-mail over all other forms of communication when learning about new product/technology offerings, according to a study from Magellan Medical, a Minneapolis medical technology company. The study surveyed over 400 medical professionals throughout the U.S., including physicians/physician assistants, nurses, hospital administration, materials management and educators.

Thirty-five percent of respondents indicated face-to-face interaction with a company representative as their preferred communication method to learn about new product/technology offerings and said this company representative should be someone with a clinical background. The third most-preferred method to learn about new product/technology offerings is at a conference or trade show, at 33 percent.

Respondents also stated evi-

dence-based outcomes were the single most important piece of information a medical company can provide when attempting to move a new product into their facility. A cost-benefit analysis registered as the second most important piece of information needed to make a decision, followed by pricing.
www.magellanmed.com



●●● advertising research
Marketer purse strings stay tight

Recession survey shows conservative outlook

Even as the nation's economic outlook brightens, marketers continue to spend conservatively as budgets remain steadfast, according to the Association of National Advertisers' (ANA) recession survey. The majority of marketers surveyed (84 percent) are still being asked to tightly manage their controllable spending, which is an increase over 2011's 77 percent. This number peaked in 2009 with nine out of 10 marketers sharing this sentiment.

Only 17 percent of marketers plan to reduce agency compensation, representing the most hopeful outlook for agencies since 2008. However, 52 percent of those marketers surveyed will challenge their agencies to reduce costs internally.

www.quirks.com

Marketers will continue to be conscientious in their spending, even as the economy recovers. Nearly half of marketers surveyed said that their advertising budgets will remain the same, one-third said their budgets will decrease and 17 percent said their advertising budgets will increase. For those companies that will reduce budgets, reductions are expected to be higher than last year, with 33 percent planning to reduce marketing budgets

by 11 percent or more, compared to 25 percent planning to reduce by 11 percent or more in 2011.

Marketers are opting for short-term budget cuts related to overhead expenditures. Almost 30 percent of marketers plan to decrease investment in professional development (e.g., conferences, training, etc.) and 21 percent plan to use more freelancers to fill open positions – both increases over 2011.
www.ana.net

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Product and Service Update

●●● panel research More than a survey site

Toluna.com launches social voting community

Wilton, Conn., research company Toluna has debuted Toluna.com, a social voting community Web site designed to allow members to connect with others while participating in surveys. In addition to making it easier for respondents to share related content on Facebook and Twitter, Toluna.com has added a social media community that aims to improve respondent quality by enabling members to follow content posted by other panelists; review posts by other members based on recommendations from others; and mark content as a favorite and recommending it to others.

The site also introduces the ability to earn Gifties. Gifties are virtual goods that members can buy with points they earn for completing surveys. Some of the Gifties can become real, through a type of instant lottery. For example, a virtual ice cream cone may become real, where a member will receive ice cream delivered to his/her home. They can also send Gifties to friends and colleagues, which is also a way to recruit new members for Toluna.com.
www.toluna.com

●●● social media research Weigh in on Twitter with Wayin

TwitPolls offers surveys and polls within Twitter

Denver social engagement service Wayin has launched TwitPolls, an interactive, social survey and polling service that aims to allow Twitter users to ask questions of their followers and receive tallied results at the close of the user-determined polling time frame. Brands can gather real-time feedback from their Twitter followers without forcing followers to leave the familiar Twitter environment.

Followers interested in a poll can click "Reply to this tweet" inside the Twitter news feed with the already-established hashtag answer. The core service of TwitPolls is free. Businesses that require additional functionality, such as leaderboards, additional games or customized charts and graphs, can contact a company representative for branded TwitPoll engagements.
www.twitpolls.com

●●● gamification Get in the game

New software brings social gaming techniques to consumer research

Nashville, Tenn., research company Consensus Point has debuted Huunu, a research software platform designed to use consumer knowledge by employing social gaming techniques to provide insights based on knowledge and judgment, rather than social and demographic qualifications. Huunu aims to offer comprehensive insights by rewarding participants based on their accuracy and knowledge

of the topic. Gaming elements, such as leaderboards and net-worth scores, offer participants recognition, reward and status, as well as an opportunity to compete and collaborate.
www.consensuspoint.com

●●● concept research A faster GutCheck

Platform aims to expedite community access using social media

Denver research company GutCheck has launched Instant Research Communities, a private, secure platform that aims to allow groups of qualified respondents to react to, validate and discuss a company's or brand's proposed business decisions out of the public eye.

The solution is designed to give users direct consumer insights quickly and affordably by allowing marketers to tap into existing communities on their Web sites, Facebook fan pages, Twitter and Google+. GutCheck instantly recruits and qualifies respondents from these pools of brand advocates and can also recruit from its own consumer panel so that brands can compare sentiment between fans and the general public.
<http://gutcheckit.com>

●●● packaging research Even better than the real thing?

Vision Critical expands virtual shopping and reporting with PackTest

Vancouver, B.C., research company Vision Critical has launched Virtual PackTest, an expanded suite of online, virtual shopping-based package-



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testing services that feature immersive, simulated shopping exercises and interactive online reporting tools. Designed to quantify the impact of graphics, architecture and structural changes using online data collection and nationally-representative sampling, Virtual PackTest provides a range of solutions from individual ad hoc studies to enterprise-wide, globally-scalable testing platforms.

The Virtual PackTest suite employs virtual technology and computer-generated environments to mimic the in-store experience, engage consumers and quantify package performance on-shelf. An analytic framework quantifies breakthrough and purchase at-shelf, with virtual eye-tracking and automated verbatim analysis revealing rational and emotional benefit effectiveness and brand communication impact.

Virtual PackTest also provides clients with an interactive online reporting system and diagnostic refinement tools.

www.visioncritical.com

●●● emotion research Trio of tools

BehaviorMatrix debuts three offerings for measuring consumer emotions

Philadelphia research company BehaviorMatrix has launched a behavioral analytics platform to analyze human emotion, allowing brands to measure the full range of emotional connections, perceptions and social momentum responsible for consumer behavior. BehaviorMatrix will initially offer three products based on its technology: Emotional Indexes, EmScape Reports and EmPower Reports.

Emotional Indexes is a data feed that extracts and quantifies an

individual emotional factor (i.e., joy, trust, fear, etc.) as it relates to a brand and its competitors. Emotional Indexes are updated daily.

EmScape Reports is a customized analysis of the entire emotional landscape surrounding a brand or product. EmScape Reports also benchmarks the brand against an average of the competition.

EmPower Reports is an analysis of the emotional and competitive landscape surrounding a brand or product. These reports provide a segmented analysis of emotional signals, including demographics of opinion leaders (both promoters and detractors) and a complete comparative analysis of competitive brands and products.

www.behaviormatrix.com

●●● data analysis Greater visibility for MarketSight reporting

Updated survey analysis platform features interactive charts and dashboards

MarketSight LLC, a Cambridge, Mass., research company, has released MarketSight 9.0, the latest version of the company's cross-tabulation survey analysis software. MarketSight 9.0 features several enhancements, including the addition of interactive charts and dashboards, aimed to provide a more widely-accessible online platform for sharing research results, even with novice or non-researchers.

The added dashboard and interactive charting capabilities are designed to allow MarketSight users to create their own dashboards without custom development or additional

costs. Access to dashboards can be limited to specific colleagues or clients or open to the public without requiring a MarketSight login. Interactive charting features allow viewers to modify the content and display of a chart, providing a level of analysis that can be performed by anyone, regardless of expertise.

www.marketsight.com

●●● CPG/retail research Predicting the future

New initiative sets out to define the next decade of consumer and retail analytics

Chicago research company SymphonyIRI has launched Analytics2020, a consumer packaged goods and retail industry initiative intended to identify and define the roadmap for consumer and retail analytics innovation in the next decade.

The initiative will comprise a global industry survey to study in detail the requirements for success in the retail landscape and how to use analytics to create competitive advantage, coupled with creation of an Analytics2020 Consortium, including leading manufacturers and retailers, academics and media agencies.

The Consortium will develop a series of position papers to articulate the capabilities and anticipated results of the new generation of analytics on manufacturers, retailers and shoppers. An online field guide will be published to take the research into practice.

www.symphonyiri.com

●●● health care research All together now

The Quality Report aims to standardize health care research reporting

The Trust Alliance, a Bonita Springs, Fla., research advocacy group, has reached an agreement on a common standard for post-field reporting of health care data collection, dubbed The Quality Report. While its members currently produce field reports for clients, the information, format and definitions have all been different, making it hard for agencies and end clients to understand and compare fieldwork performance. The Quality Report is designed to offer a common approach to the reporting of this information. www.thetrustalliance.org

●●● mobile research All responses welcome

Research service offers survey solution for all cell phone users

CMS Research, Toledo, Ohio, has developed its mobile research plan to survey all potential cell phone respondents on both feature phones and smartphones. CMS Research's delivery options are intended to open up the survey to any cell phone user by utilizing an automated phone survey using interactive voice response (IVR). IVR can be combined with smartphone-exclusive Web surveys or used as the sole survey vehicle.

One programming effort produces both a Web and IVR option, which can be delivered via text, with all data col-

lected in the same data file. Respondent identification numbers are checked against the same database so respondents can respond with one methodology or the other – not both. www.cmsresearch.com

●●● research software Updates on the Horizons

Confirmit launches version 17 of multichannel software solution

O slo, Norway, research software company Confirmit has released version 17 of Confirmit Horizons, its multichannel software solution. Confirmit Horizons Version 17's updated features include new mobile and Web survey layouts; new customization and branding options; enhanced collection and processing of unstructured data using a text analytics suite; support for a wider range of Web platforms for designing surveys and reporting on feedback; further integration of mobile data into the Confirmit platform; the ability to view media captured on mobile devices, such as photos and video clips, from within Confirmit's reporting suite; new panel management; and enhanced speed and ease-of-use. www.confirmit.com

●●● survey software SurveyBuilder's new construction

Survey-authoring solution debuts updates

Encino, Calif., research company eSamp has unveiled a series of

upgrades to SurveyBuilder, its online survey authoring and on-demand consumer audience platform. New features include automatic formatting of all surveys for mobile devices, geographic targeting and image-based questions.

SurveyBuilder includes geographic audience targeting by designated market area (DMA), allowing users to select survey respondents based on location and from any DMA in the U.S. www.usamp.com

●●● Briefly

■ Columbia, Md., research company Arbitron Inc. has launched a syndicated, mobile consumer research service in the U.S., dubbed the Arbitron Mobile Trends Panels. The service includes an opt-in panel of approximately 6,000 smartphone and tablet users and is designed to use a proprietary, on-device software meter to provide information on how mobile consumers use apps; surf the Web; engage in social media; participate in e-commerce; are exposed to and act on advertising; and use their device to communicate. The service gathers data whether the device is online, connected to a cellular or Wi-Fi network or used offline. www.arbitron.com

■ SocialQ, a San Diego market intelligence engine, has designed a system for profiling respondents based on data points such as activities, attitudes and preferences - from favorite TV shows and sources of news to education and political affiliation. SocialQ collects this information by asking panelists to connect via Facebook. www.socialiq.com

■ San Francisco research company MarketTools Inc. has expanded its shopper research solutions with the addition of new Web technologies

intended to collect technical data, including behavioral metrics like time on task, selection order and pause time.

www.markettools.com

■ Google, Mountain View, Calif., has launched its first consumer survey tool. Google Customer Surveys prompts users to answer a question before accessing gated, premium content. Google then analyzes the answer.

Up to two questions can appear in each pop-up and the cost is \$.10 per response for a general Internet audience or \$.50 per response for a targeted audience. Publishers of the sites on which surveys appear also get paid by Google. They receive \$.05 per survey response.

www.google.com/insights/consumersurveys

■ Vancouver, B.C., research company Vision Critical has released the Vision Critical Surveys App for HootSuite, a Vancouver, B.C., social media management company. The app is designed to allow users to distribute survey links via social media and view results from within the HootSuite dashboard. The app provides direct access to Vision Critical Surveys. The Vision Critical Surveys App is available for free to all HootSuite users.

www.visioncritical.com/hootsuite

■ San Leandro, Calif., research company Opinionmeter International has released its TouchPoint survey app for Android.

www.opinionmeter.com

■ Toronto research company Hotspex Inc. and Toronto marketing company LEVEL5 Strategy Group have partnered to offer BrandMap, an online research tool designed to quantify and link emotional and rational drivers of brand usage. Rooted in emotional science, BrandMap aims to deliver insight into the emotional consumer-brand relationship and measure its impact to shape brand strategy.

www.hotspex.biz

■ Creative Research Systems,

Petaluma, Calif., has released an Android version of its interviewing software. The app does not require a live Internet connection and includes logic abilities, such as branching, piping, randomizing and more. It can also show pictures, play sound and record respondents' answers in their own voices.

www.surveysystem.com

■ Cincinnati research company ThinkVine and Richardson, Texas, marketing solutions company KBM Group have partnered to extend KBM's customer intelligence analysis in marketing-mix modeling and what-if scenario-planning across consumers, tactics and channels. The combined capabilities are intended to allow KBM to help clients better engage with customers and improve marketing planning, sales and ROI in a time of evolving media.

www.thinkvine.com

■ Convergys Corporation, a Cincinnati customer management company, has received a new patent from the United States Patent and Trademark Office for an analytics technique designed to improve the customer experience within an interactive voice response (IVR) system by statistically linking IVR and caller satisfaction data.

www.convergys.com

■ London research company YouthSight has developed Bright Young Minds, a research tool based on its panel of 115,000 respondents ages 16-to-28. Bright Young Minds uses a profiling system intended to segment the best and the brightest students and young people into the following groups: Connecteds, Creatives, Curious Minds, Market Mavens and Civic Activists.

www.youthsight.com

■ Roger Green and Associates Inc., a New Hope, Pa., research company, has launched the Health Payer Council (HPC), an online community of medical and pharmacy directors from leading U.S. medical insurers and benefit managers. The HPC is a shared community, providing

research tools and private discussion opportunities for its members. The site will be funded by subscriptions from health care product manufacturers, along with marketing research studies.

www.rogergreen.com

■ InSites Consulting, a Ghent, Belgium, research company, has released a set of mobile and social media extensions to its market research online communities, including integration with Facebook.

www.insites-consulting.com

■ New York research company Ipsos Healthcare has launched a new suite of Molecular Diagnostic Monitors to complement its Global Therapy Monitors. This family of studies aims to provide a multi-stakeholder view of the molecular diagnostics (MDx) market in multiple indications. First in line is the Oncology MDx Monitor.

www.ipsos-na.com

■ Essential Research, London, has launched The Essential Eye, a quarterly tracking study of 3,000 U.K. adults that aims to reveal how audiences are using new media technology and what they are using it for.

www.essentialresearch.co.uk

■ Cleantech Group, a San Francisco research company, has released the latest update to its i3 market intelligence platform, designed to combine its clean-tech industry database with ways for users to identify and connect with prospective partners, investors and customers. The latest release allows subscribers to contribute content, receive targeted alerts, make connections and keep private notes.

<http://i3.cleantech.com>

■ London research company TNS has released the findings of The Automotive Path to Purchase Study (TAPPS), a study intended to help international automotive brands gain a stronger foothold in Eastern markets. TAPPS is an interactive, online study that aims to measure in real-time the actual sequence of events in the buying process over a period of four-to-

six months across all touchpoints. TAPPS highlights five new rules for car companies hoping to grow their presence in China. www.tnsglobal.com

■ Jeffrey Bean of Del Mar Research and Consulting LLC, Del Mar, Calif., and Sean Van Tyne of Fair Isaac have released *The Customer Experience Revolution - How Companies Like Apple, Amazon, and Starbucks Have Changed Business Forever*, a book that details the critical management decisions and best practices that take place at companies dubbed "experience makers." www.delmarresearch.com

■ New York research company Ipsos Public Affairs has released the 15th edition of its U.S. Diversity Markets Report. The biennial report covers demographics and market characteristics for the Hispanic, African-American and Asian-American markets, built from 4,700 interviews among diverse consumers. www.ipsos-na.com

■ Kinesis Survey Technologies LLC, Austin, Texas, has published a white paper, titled *Issues and Considerations for Migrating Large Panels*. The white paper offers recommendations about how to successfully move a market research panel from one software platform to another. www.kinesisurvey.com/resources/whitepapers

■ New York researcher The Nielsen Company has released its *The State of the Hispanic Consumer: The Hispanic Market Imperative* report, which highlights trends across Hispanic culture, population shifts, purchasing behaviors and media consumption. www.nielsen.com

■ Los Angeles industry and market research reporting company IBISWorld has released the U.S. Industry Market Research Report. www.ibisworld.com

■ Encino, Calif., research company

uSamp has launched a Hispanic panel of over 100,000 members. www.usamp.com/panels

■ Paris research company Ipsos has launched a panel in the United Arab Emirates. www.ipsos.com

■ London research company Marketest has published *Extreme Outdoor Sport*, a report on consumer opinion regarding an extreme sports

holidays package for adults. www.marketest.co.uk

■ Irvine, Calif., research company MacKenzie Corporation has redesigned its Web site at www.mackenziecorp.com.

Correction: In the May 2012 Product and Service Update, Atlanta research technology company ActiveGroup's Web address was listed incorrectly. The company is online at www.activegroup.net.

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Behavioral science and the future of business

| By Aaron Reid



snapshot

The author argues that behavioral science and its associated disciplines offer much promise in researchers' efforts to go below the surface and uncover true insights.

For years, the market research industry has been dominated by methods that rely on explicitly-stated information from consumers on what they want and why they want it. This surface-level data cannot avoid the tragic “can't say/won't say” problem (i.e., that consumers are often unable or unwilling to self-report the true drivers of their behavior). Subsequently, our models of consumer behavior that rely on this explicitly-stated data are fundamentally flawed and even our most elegant estimation procedures (e.g., hierarchical Bayesian utility estimation, structural equation modeling, etc.) cannot cover up those flaws.

It is as though we are trying to use a complex combination of circles to describe what is really an ellipse. If we have the wrong data inputs for our models, our description – and therefore our insights – will miss the mark.

Our industry is in need of descriptive models of behavior that not only provide better prediction of consumer behavior but also provide a fundamental truth about the whys behind consumer behavior. This is where true insight lies and by uncovering that insight we can reveal a reservoir of innovative ideas for business. When we know the true nature of how people reach a decision, we can then provide products and services that better meet their needs. And when companies better meet consumers' needs, both companies and consumers prosper.

Constant search for innovation

In order to achieve growth, business is in constant search for innovation. To find

true innovation we need novel insight into human needs and motivations that are not currently being met in the marketplace. As market researchers, we may feel that truly deep insights are hard to find. I believe this feeling has arisen because historically, as an industry, we have been inspecting the surface level for reasons.

The good news is that deep insights on the whys behind behavior have already been unearthed. Within the behavioral sciences there is a vast reservoir of knowledge on human needs and motivations that is largely untapped by business. The behavioral science literature, including the sub-disciplines of psychology, neuroscience, sociology, behavioral economics and cultural anthropology, possesses deep knowledge on the whys behind behavior that has yet to be applied on a broad scale by businesses. This has led to a lot of buzz around the promise of new methods, including: neuromarketing, behavioral economics, implicit associations, eye-tracking, the quantification of emotions, social media analysis and choice architecture. Each of these disciplines and research tools holds great promise for revealing new insights for business.

Let's take the case of the behavioral economics principle of hedonic bundling as an example of how behavioral science can provide a deeper understanding of the why behind behavior and thereby provide a foundation for replicable successful marketing.

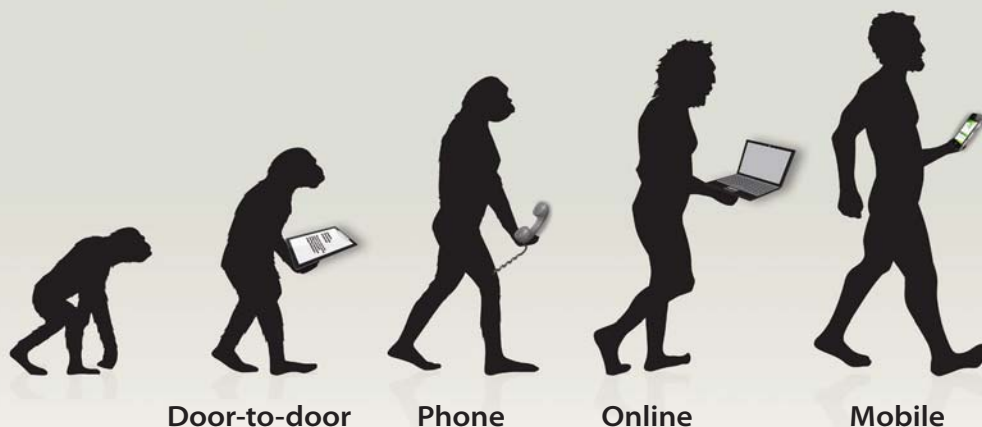
Imagine you walk into a grocery store and you see the following promotion on a gallon of milk and a bag of cookies:



quirks.com/articles

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Promotion A: Buy together and get \$2.00 off!

It sounds like a good deal and you might consider buying both the milk and the cookies. However, imagine you walked into the same grocery store and you saw the following promotion on a gallon of milk and a bag of cookies:

Promotion B: Buy together and get \$2.00 off the cookies!

Which of these two promotions sounds better to you? Promotion A or Promotion B? You've probably noticed that fundamentally these promotions are the same: you have to buy both products and if you do you'll save \$2.00. However, one of these promotions is much more effective at increasing bundle sales.

Kahn and Dhar (2010) dubbed Promotion B an hedonic bundle and showed that in a bundled product offering (i.e., buy two items and get a discount), placing the discount on the more "hedonic" item in the pair (e.g., the cookies) can increase bundle adoption up to 20 percent!

Hedonic bundling is an effect that results from two key behavioral economic principles of framing (Tversky and Kahneman, 1981) and mental accounting (Thaler and Sunstein, 2008). The mechanism behind hedonic bundling (the why) works as follows: Shoppers create different mental buckets for their indulgences. Indulgences come with the specific cost of guilt of having indulged. Therefore, offering discounts on the more indulgent item in a product bundle effectively reduces the pain of the guilt following from the indulgence. Reducing the pain reduces a choice

obstacle and this simple framing of the discount results in greater bundle sales.

Understanding the true why

As a researcher, understanding the true why behind this behavior (rather than relying on what consumers would state explicitly) places you at a distinct advantage in providing guidance for your client. Revealing the qualifying conditions and the mechanisms at work within each principle provides the foundation for generating applications of the principle to the marketplace. Gaining this deeper level of explanation allows for the principle to be generalized for broad strategic and tactical executions that a more surface-level explanation cannot achieve.


A surface-level explanation of why I'm more likely to buy the milk and cookies when you give me the discount off the cookies would likely have provided a non-replicable insight at best or an erroneous understanding of the why behind the behavior, leading to wasted marketing or innovation resources.

Understanding that the effect works through the mechanisms of active shopper mental accounting and "guilt mitigation" provides key insight for marketing communication, new product innovation, product-pairing ideas and social media promotion strategy, as well as balanced product offerings across the product and brand suite and inventory management, to name a few. The description of the behavior is more fundamental and therefore the insights more powerful for driving business growth.

Hundreds of principles

It is important to note that this is the application of one behavioral economics effect to one business application (promotion optimization) within one vertical market. In the reservoir of current behavioral science insights, there are hundreds of behavioral economics principles that can be applied to multiple business issues across all verticals. And that's just behavioral economics! Similar depth and breadth of behavioral insight can be found in social psychology, neuroscience, sociology and cultural anthropology, among other disciplines.

This brings us to an innovation imperative as an industry. The best research firms will construct themselves around these disciplines and, with the addition of keen insight on how to apply the insights to business in a practical and accessible format, will make a tangible impact on their clients' businesses.

While the reservoir of insights is deep and the methods for extracting insights are advancing every day, the market researcher still needs to assess when to use which advanced method to answer the fundamental business question at hand. With a strong dose of humility and a fierce commitment to delineating when specific behavioral science methods are most appropriate for which business applications, we can make the promise of behavioral science the future of business. 

Aaron Reid is chief behavioral scientist at Sentient Decision Science, a Portsmouth, N.H., consulting firm. He can be reached at 603-570-4819 or at aaronreid@sentientdecisionscience.com.

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snapshot

Discovery Channel commissioned a three-phase hybrid research project to understand how TV fulfills unmet needs.

●●● television research

Unscripted: Viewers open up about TV

Research helps Discovery Channel chart a course for the future

| By Emily Goon

In 2005, millions of Americans climbed aboard the *Cornelia Marie* with the late Captain Phil Harris and his crew as they braved the frigid waters of the Bering Sea to fish for crab on Discovery Channel's hit documentary series, *Deadliest Catch*. Viewers were captivated by the danger and intrigue of life at sea and grew to love the characters and the show's ratings skyrocketed when Captain Phil died in 2010 during filming for the sixth season. The outpouring of grief from *Deadliest Catch* fans further proved to Discovery that the show was something special – and something people wanted more of.

The show's overwhelming success spawned several other reality shows that followed a similar formula of people wrangling dangerous creatures in unfriendly waters. However, it soon became clear that all docudrama series are not created equal. *Deadliest Catch*'s success was not easily replicated. After all, it is a constrained model: How many fishing shows do viewers really need?

The creation and subsequent mild accomplishments of shows mimicking *Deadliest Catch* indicated to Discovery



that establishing a true connection with viewers isn't as simple as producing a show about death-defying fishing feats in perilous waters. A show has to deliver something greater than the sum of its parts. Clearly, the job of TV goes beyond mere entertainment.

Uncover the relationship

To better understand the role of TV in viewers' lives, executives at Discovery Communications, Silver Spring, Md., sought to uncover the relationship between viewers' deep, underlying psychological needs and the TV they watch. What drives TV-viewing and what are consumers trying to accomplish when they watch TV?

This research was initially inspired by an article in the *New York Times* regarding innovation and how businesses are employing techniques to involve customers as partners in invention. Discovery felt a similar approach could assist with successful programming development.

Ingrid Gorman, senior vice president, research, at Discovery Communications, says, "As technology changes, viewers are becoming much more demanding about fresh, innovative content and things that are really going to connect with them emotionally. Discovery is about igniting curiosity and in research we are also naturally very curious. This is about an evolution of trying to understand, on a deeper level, why people behave the way they do. It was natural for us to pursue that."

TV as a whole

These goals required examining TV as a whole and how it fits into consumers' lives. Discovery reached out to Insight Strategy Group (ISG), a New York research company that specializes in media and social sciences, to conduct a wide-ranging study of TV as a whole. Discovery understood that to effectively identify what TV accomplishes in the lives of viewers, it needed to evaluate not only its own programming but that of its competitors – including shows that, on the surface, have nothing in common with Discovery. Discovery wanted to explore what viewers seek when they turn on the TV and apply that knowledge to improve its own programming.

But how? The fundamental question – What is the role of TV? – asked in a traditional research questionnaire doesn't go deep enough. Boaz Mourad, co-CEO of ISG, says, "If you ask people, 'Why do you watch TV?', they would say, 'Because I like it; because it's entertaining.' That's the surface level. Then you can ask, 'Why do you like it? Why is it entertaining?' They might list show attributes – it has characters they like, it

makes them laugh."

Unfortunately, most research doesn't go beyond the second probe question. In this case, Discovery needed to ask why: Why does it make you laugh? Why is it funny? Why do you like this character?

"The reason most research focuses on the attribute level is because it's easiest to program to that. The show you like more is going to be the one you're more likely to watch. But knowing which one you like has no explanatory power.

The deepest level is a bit less predictive but it opens up a creative lens for how you can meet a need, separate from how you've done it before," says Mourad.

In short, Discovery wanted to find ways to meet the intimacy needs of viewers with something that isn't a fishing show.

A three-pronged approach

The project began in 2010. ISG designed a three-pronged hybrid research approach that included expert in-depth interviews (IDIs), viewer ethnographies and a national online quantitative survey. ISG was responsible for all three phases of the research and a Discovery client attended both qualitative phases.

To begin, ISG combed through academic literature on media to find male and female academics, media professionals and psychoanalysts who had developed theories and ways of thinking about the role of TV in people's lives. ISG then hired a recruiting agency to recruit nine experts for phone interviews.

The expert IDIs were intended to build hypotheses about the job of TV based on the experts' insights and ISG's experience in media. "Academics have things like mood management theory. Psychoanalysts look at aspirations and how viewers see characters, what role that plays, who they are and how they use TV as a vehicle to bring out their identity. Each expert had their own language," says Mourad.

One hypothesis was that people come to TV to fill unmet needs – when they have gaps in their life or when their "real" and "ideal" self don't align – suggesting that many viewers crave intimacy, freedom, a personal connection, a feeling of belonging, a fulfilling relationship or the opportunity to express themselves. This hypothesis provided a framework for the ensuing research phases.

Unearth the connection

Armed with a working theory on what motivates TV-viewing, ISG conducted 10 viewer ethnographies with men and women in the New York area – not New York City – and Kansas City, Mo. (five from each region). The New York respondents repre-





sented the more sophisticated media consumer, while the Kansas City respondents were meant to shed light on Middle America. The ethnographies were conducted to understand consumers' personal lives and psychological needs; explore the psychological needs that impact behavior; and unearth the connection between psychological needs and TV-viewing.

The ethnography respondents were simply regular TV viewers, not necessarily people who watch Discovery, as Discovery aimed to determine – and appropriate – what other networks were doing well. As you might imagine, the number of American adults who are TV viewers – the only requirement for the

ethnographies – is substantial, with nearly all households owning at least one television. ISG sought out well-spoken, “regular” viewers by including screening questions that measured creativity and articulateness. In this case, potential respondents were asked to describe why they like a particular show. Those who sounded most insightful were selected for the ethnographies.

Free therapy

And insightful, they were. Discovery was impressed with the degree to which the respondents were forthcoming and honest. “When we went in to do the ethnographies in people’s homes they were surprisingly honest with us. I wondered

why. It seems to me that it’s almost like free therapy. How often does someone come and talk to you for a couple hours and all you have to do is talk about yourself?” says Gorman.

Mourad confirms, “These were the most intense ethnographies we’ve ever done, in many ways. They were really almost like therapy sessions. There was a lot of crying, sharing, connection.”

ISG used the opportunity of being in respondents’ homes to examine their lives as a whole. The vast majority of the discussion did not center around television. Instead, ethnographers spoke to respondents about life in general. Only after they spoke about their life did any mention of TV-viewing arise. Respondents were not asked to make the connection between their life story and their viewing; this was done separately by the researchers.

“Actually sitting with them in their homes, you get information about what particular types of shows are resonating with them but also what’s going on in their lives. What are the things that they worry about? What are the things that they hope for? What are their current circumstances? Is somebody sick in their family? Are they out of work? Did they just have a new baby? All of these things go into this wonderful soup where we can interpret, on the back end, where the connections are being made,” says Gorman.

Cast a wider net

The quantitative phase took the learnings from the expert IDIs and ethnographies to cast a wider net to match up benefits, motivations and underlying psychological needs with particular programs. In an online survey, 2,600 men and women (2,400 from the general population and 200 from an oversample of Discovery viewers) were asked the same personal questions that were asked in the ethnographies, followed by questions about what shows they watch and what those shows provide (i.e., makes me laugh; has a character who’s politically incorrect; gives me inside jokes only certain people can pick up on, etc.). The data allowed ISG to assess which qualities are statistically associated with various types of shows.

“We were finding connections between unmet needs or wishes and

the kinds of shows that people watch. You might see that people who yearn for intimacy end up watching all of these different *Housewives* shows. And guys who feel like they lack a connection and wish they had more time for themselves end up watching *Deadliest Catch*," says Mourad.

In total, the research analyzed viewer connection with 26 different programs, from *Law & Order: SVU* and *Family Guy* to *True Blood* and *Jersey Shore*. The small sample of shows was selected by ISG and Discovery based on an all-encompassing definition of success, including high ratings, fan favor and critical acclaim. Programs from all genres, ranging from comedy to nature, were included and had to be popular so



that each show was rated by enough respondents to provide sufficient data.

"We looked at shows that were highly successful to understand why those shows were such hits but some came up organically. When we were talking with people about what they love and what they can't miss, that's where some of the other niche titles popped into the study," says Gorman.

Freedom is key

So what is it? What drives consumers to particular programs? When answering the question of why hit shows become hit shows, the research found that freedom is key.

"Freedom was the strongest, most salient need. There were three freedom needs: freedom to be myself, freedom to act out, freedom from my everyday," says Mourad. In today's

world, where we are constantly connected and accessible via mobile more than ever before and with the added pressure of the recession, the need to break out and feel free seems particularly pronounced.

The yearning for freedom seems even to transcend the divide between scripted and unscripted programming. In fact, each type of show can be simi-

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larly satisfying. For example, compare *Deadliest Catch* and *Entourage*, both of which feature aspirational lifestyles and characters who do the things the average person wishes s/he could but can't. *Deadliest Catch* is unscripted and *Entourage* is scripted but both meet the same psychological need: freedom. Essentially, the rules don't apply on the ocean or to the mega-celebrities on *Entourage*. Additionally, *Mythbusters* and *Mad Men*, two shows most would not think to link together, both provide freedom from the everyday.

Framing real life

However, though scripted and unscripted programming can meet the same need, Discovery has its own set of limitations. As a purveyor of non-fiction entertainment, it doesn't have the freedom to fabricate characters or write and rewrite content. Instead, Discovery is charged with the task of framing real life in a way that satisfies viewers' unmet needs.

"It's an important differentiation between fiction and nonfiction. It's harder for us since we deal in nonfiction. We have to go find those characteristics in real people that resonate with an audience. But there are certain areas we can explore further with a character if we know what to look for. It's a different exercise than our competitors," says Michelle Russo, senior vice president, corporate affairs and communications, at Discovery.

Though that's not to say they can't learn from scripted shows how to frame compelling characters. "The beauty of the study, in retrospect, is that we weren't looking at the nonfiction space

only," says Gorman. "We were looking at television and what is inspiring to people because we can learn, as a company, from just about anything that's out there and from the things that are working. This research really illuminates the whys behind the ratings and we can certainly try to use that knowledge to determine how we need our characters and stories to be on Discovery," says Gorman.

Already delivers

In the end, the research was presented to Discovery's general managers and the creative council and Discovery is using the research to inform future projects and provide the freedom viewers so desperately crave. Fortunately for Discovery, its programming already delivers on viewers' need for freedom.

"At its best, Discovery's core strength is taking people out of their day-to-day lives and putting them someplace new – new ideas, new experiences, new places, new people. And that, I believe, is what people crave from their Discovery experience," says Gorman.

Beyond the obvious

Discovery found that viewers seek true fulfillment from TV, proving that there were more intimate, meaningful reasons *Deadliest Catch* earned its place in viewers' hearts, beyond the obvious lure of drama on the water. By focusing on what underlying, unmet psychological needs a show satisfies instead of what attributes it delivers, Discovery stands to deliver characters and stories that connect with viewers on the deepest level – a recipe for compelling television, no matter the genre. ①

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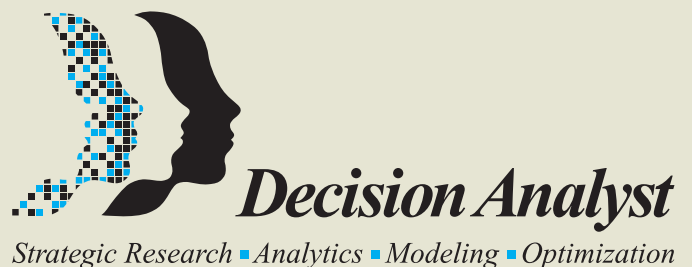
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Take your time

Don't rush through the qualitative screening process

| By Daphne Dodson

snapshot

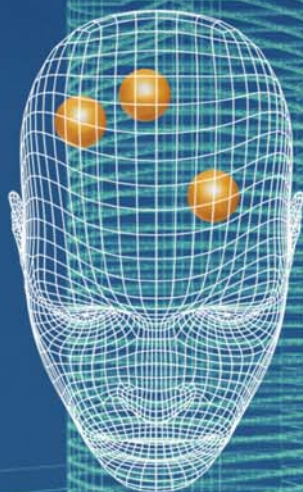
Good qualitative depends on good recruiting, the author says. Want good recruiting? Start with your screener.

I recently completed two separate projects that prompted my hyperawareness of the importance of a good screening. Though there may always be hiccoughs that arise during any recruit, preparing for and addressing common challenges helps to minimize significant issues. I'll address some of those challenges here and some strategies for working around them.

Value the screener. The qualitative screening process is imperfect. The end client has the "right" respondent in mind and conveys this target to his internal market research partner who, in turn, informs her qualitative market research firm, who communicates this to the recruiting firm's project managers, who train the actual recruiters, who screen potential respondents. Remind you of the game of telephone?

The screening tool is the document that should keep all project members searching for the same person. Thus, taking the time and effort to write, review, modify and then re-review the screener is invaluable. However, screener prepara-

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tion, review and recruiter training are some of the most rushed components of the qualitative research process. Not only do the key members of the research team not take the time, we often don't put in the effort to carefully review the screener to ensure that who we want to interview is exactly who we will interview based on our screening questions. We all own the issue but the ultimate accountability heavily weighs on the end client, who has a very firm mental grasp of the "perfect respondent." If she truly understands this, my experience has been that she is far more likely to dedicate the effort to screener review.

Vet the screener. A well-established screener makes the screening process a great deal easier because in all likelihood bugs (such as poorly-written questions or impossible criteria) were worked out in the first few screener generations. When you are seeking a new target, you don't have the luxury of relying on an established screener. You might have starting places – screeners that appear right for the job after minor edits. But beware: a "close screener" may create even greater issues because it allows for complacency.

I'll offer a simplistic fictional example. Say the marketing team wants to begin to gather customer reaction to a prototype child car seat. You have conducted qualitative research with moms in the past for your infant car seats, so you dig out your existing screener as a starting place and adjust for the fact that this study seeks to interview moms of children (not infants). The first interview begins and the end client informs you this respondent is all wrong: "We didn't want moms who drive a coupe; our child car seat won't fit in the back seat of a typical two-door car." (The infant seat never had this issue.) Interview two begins and you become painfully aware that the prototype has a weight limit – and there are some toddlers who apparently exceed it. The end client was aware the car seats were too big to fit in the back of a coupe and too small to accommodate larger toddlers but never thought about screening out moms based on their cars or their children's weights because, honestly, the marketing team assumed that most moms drive minivans or four-door sedans and toddlers are about the same weight. Of course, this newly-gained awareness is

in and of itself good learning but if the study objective is to improve the prototype, the sample of qualified recruited respondents dramatically dwindles.

Two of the best solutions to manage this potential issue are:

1. Informally vet the screener. In this example, we could have thought of the moms we knew and called them to go through the screener and then to talk about the product with us. Informal "friends and family" interviews help us to see holes that are difficult to anticipate and assumptions that are inaccurate. This is especially helpful in medical or business recruits where our personal knowledge of the new target is even more limited.
2. Formally vet the screener. This takes a little more money and time. In this case, you would screen respondents and then invite them to a short telephone conversation. The researcher would ask a few questions to ensure they are the right target and can be invited to the actual research interview. This technique helps ensure quality screening questions and is also a nice way to prescreen for respondent articulation.

Be mindful of elusive algorithms.

Qualitative research offers a rich opportunity to better understand market segments, digging deeply to bring segments to life in a way that quantitative research simply cannot. To find respondents who fit the segments, algorithm questions provided by the quantitative firm are added to the screener. In most cases, they are questions in the quantitative questionnaire that drove the segmentation solution. The challenge is that these algorithm questions are often based on attitudes and reported behavior and segments are often developed based on degrees or skews of behaviors or attitudes rather than on absolute distinctions.

Let's take another fictional example. A cosmetics company has an algorithm that includes the following questions:

On a scale of 1 to 7, how strongly do you agree with the following statement?

I feel very self-conscious if I leave my house without first applying makeup.

How long does it take you to apply makeup before you go out in the evening?

The difference between a response of



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a 5 or 7 on the first question and 15 minutes to 30 minutes on the second question might move a potential respondent from being segmented as “Easygoing Glamour” to a “Cosmetics Connoisseur.”

Consequently, respondents recruited to one segment may shift in their attitudes or reported behaviors between initial screening and interview and wind up in a different segment. Again, if we think of the example above, imagine that an “Easygoing Glamour” respondent walks into the group with seriously “smoky eyes” because her new, beautiful friend just introduced her to a how-to YouTube video and our respondent is trying to perfect the technique (which, by the way, took her an additional 15 minutes of application time).

This phenomenon proves not only frustrating but quite dicey when trying to draw conclusions from the research. To minimize the issue:

1. Be aware of this when working with your quant firm to develop segments and segment algorithms. Algorithms that are heavily based on skews of attitudes and reported behaviors can be quite challenging when put into practice.
2. Rescreen before the interview or at the beginning of the interview so that the qualitative researcher and listeners are not mistakenly forming perceptions based on incorrect information.
3. Ensure that the design of the study takes into account that a certain number of interviews are likely to shift. If the sample size is robust, interviews that shift can be removed or adjusted before analysis without compromising the study.

Beware of mini-quants. It is not uncommon for end clients to look at the screening process as an opportunity to do a bit of quantitative assessment. Consider all those information-only questions just to get a record of how many said what. Of course the operative term of “how many” exposes the issue – we are using a qualitative screening process to seek a quantitative metric. But why bother to care?

1. These questions bog down a screener, impacting both the behavior of the recruiter and the potential respondent. The longer the recruiters are on the phone and the more questions they are asking any potential respondent, the greater the risk of quality degradation.

It is simply reality that sometimes long screeners result in sneaking in a “bad recruit” just to get the project complete.

Picture a doctor, a mother or a businessperson on the phone answering a myriad of questions to see if they just might qualify for the actual paid interview. At a certain point during the screening process, many potential recruits wane in actually listening to and thoughtfully answering questions – even the questions responsible for screening them in or out of the study.

2. The sample size, sample base and screening methodology for qualitative recruiting cannot offer quantitatively-sound findings.

Information-only questions can easily be added to the discussion guide and if they are not important enough to ask during the interview, arguably, they should be stripped from the screener. Occasionally these questions are added to the screener to guide future studies (gaining directional findings regarding incidence rates of responses before making them recruit specifications). While this can be an appropriate use of such questions, a better approach (than risking the current recruit) is to ask recruiting partners to e-mail blast their databases to pretest a specification.

Quality often requires flexibility.

Some clients hold the perception there is nary a reason to not find a respondent. It often becomes shocking to clients when they come to discover that the man who rides a unicycle to his job in the staple-removal department of an allergen-free peanut factory is difficult to find. Okay, I’m being cheeky but my sentiment is rooted in reality. The market, methodology and logistics must suit the screening criteria.

A great deal of my work is spent in health care and I’m always surprised when clients think that because there are 60 specialists in the city we are heading to, we will have no problem getting the eight we want. I try to help them become more realistic when I explain that:

1. We are asking them to leave their practices, commute 60 minutes round-trip and arrive on time for a specific hour and date (which we’ve deemed the best for us to listen to them, not best for them to attend).
2. We only want them if they meet a certain size of practice, years in practice,

prescribing behavior, etc.

3. The rate we are paying is barely, if at all, fair compensation for their time and effort.

This isn’t just a health care client issue. Consumer packaged goods and service industry clients are also challenged to remember that incidence rates of attitudes, behaviors, socioeconomic and even demographics differ greatly by geography – a national incidence rate is just an average. Couple this with our strict recruiting criteria, available interview times and our compensation rates and our large number of potential recruits significantly shrinks.

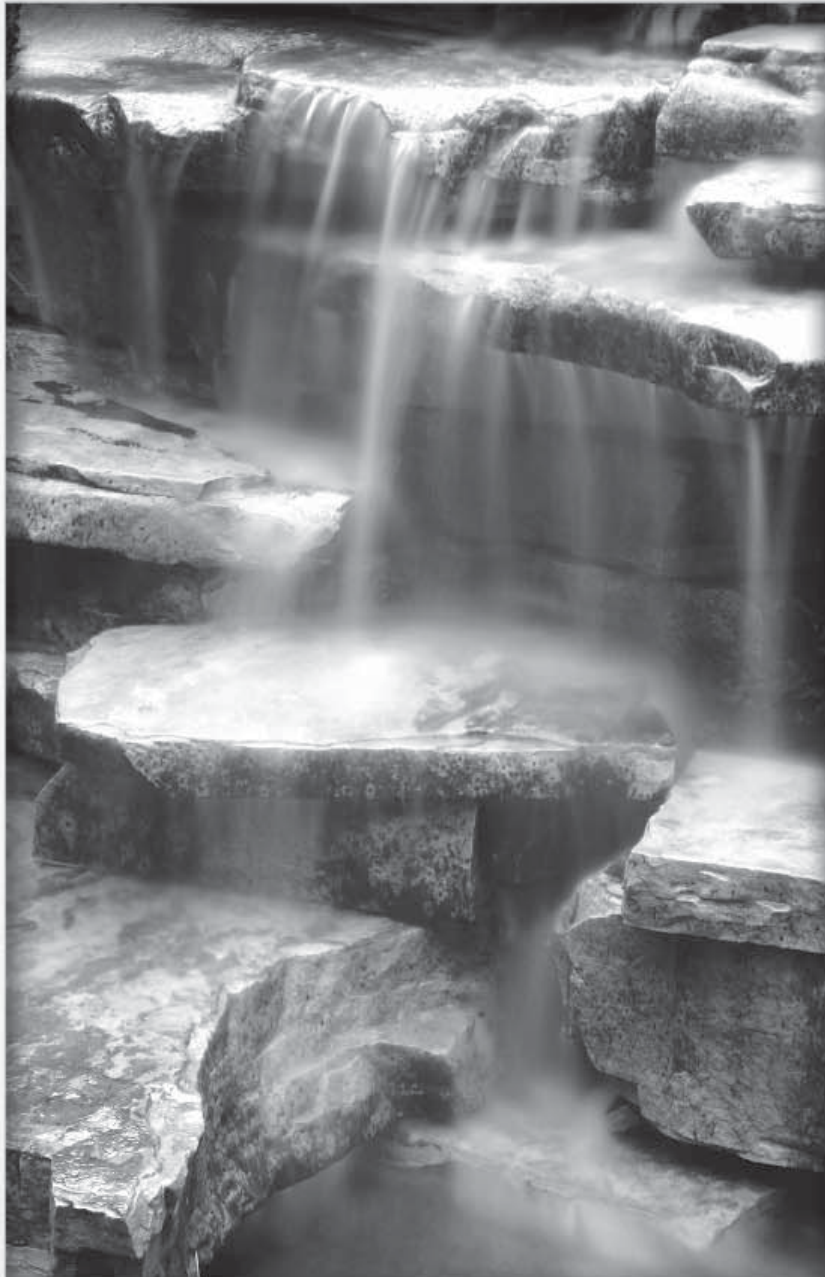
The best way to avoid this potential issue is to be thorough and open-minded during the design phase. The more the end client, market research client and qualitative researcher know who they want going in, the better we can design the study and select the best recruiting partners. This might mean choosing cities not based on where the client and agency are located but where the category development index is the highest. It might also mean a willingness to spend two days in one market to allow for evening slots, with no interviews during the day. It can also mean a mixed design (adding telephone and Web-assisted interview methodologies) to round out a needed sample size. It definitely means listening to the recruiters and qualitative researchers who are willing to stretch themselves but also recognize the importance of setting realistic expectations.

Invest a bit more

Consider the three factors that impact all projects: quality, cost and time. If we want a quality recruit, we might have to invest a bit more time and financial resources to ensure we have just who we need. If our timeline or budget is inadequate, we might need to accept less-than-ideal quality. While I like to believe that my skills as an interviewer and analyzer are essential to sound findings and actionable results, I humbly recognize that whatever talents I bring to the table are compromised or complemented by the person or people who I am interviewing. A good interview begins with a good recruit. **1**

Daphne Dodson is managing partner of Qual-Smart LLC, a Cary, N.C., research firm. She can be reached at 908-531-0509 or at daphne@qual-smart.com.

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Everybody's talking!

Eliciting participant discussion during bulletin board focus groups

| By Michael B. Mercier

snapshot

The author advises researchers on optimizing participant interaction when conducting bulletin board focus groups.

In the typical bulletin board focus group the moderator posts one or two sets of questions each day. Participants are expected to provide their initial response to each question and then to discuss their responses with each other.

Getting participants to provide their initial response to each question is easy. However, getting them to engage in discussion can be a challenge for several reasons. First, some participants may simply lack a clear understanding that this is expected of them; they may perceive providing their initial response as being the primary expectation and interacting with others as secondary – or even optional. Second, some may perceive providing their initial response as being relatively easy to do yet perceive participating in discussion as being laborious. Third, some may be very time-constrained when responding. And, finally, some simply may resist becoming fully engaged in the board.

Every board will differ in terms of whether these challenges will emerge. Some will present all of these challenges, some will present none and the majority will fall between these two extremes. Unfortunately, it's impossible to predict which of these challenges will emerge with any given board. Therefore, to be effective you must proactively manage the board to prevent them from emerging.

Your strategy for proactively managing the board should be designed to achieve the following objectives:

- to carefully manage participants' expectations of what will be required of them;
- to provide an incentive for engaging in quality discussion;
- to vigilantly ensure that respondents aren't overburdened with too many questions; and
- to optimize the level of participant engagement.

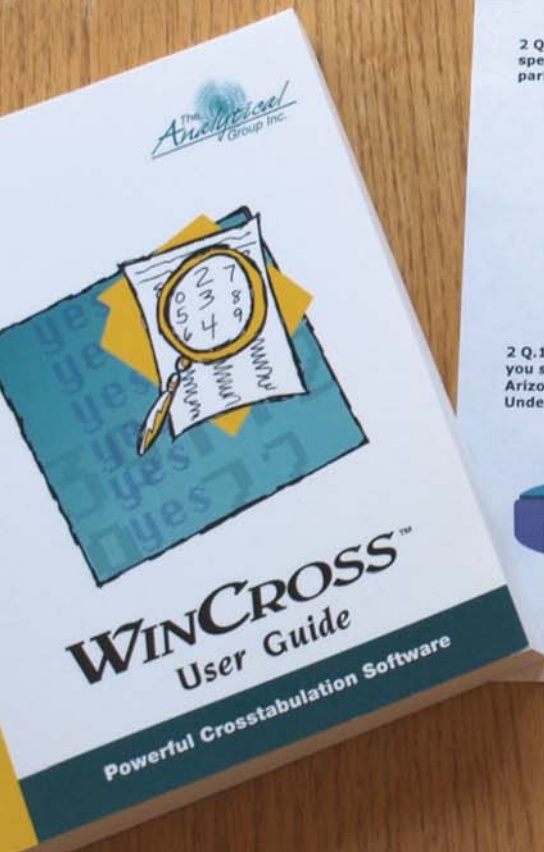
Let's review the tactics you can use to achieve these four objectives.

Managing expectations

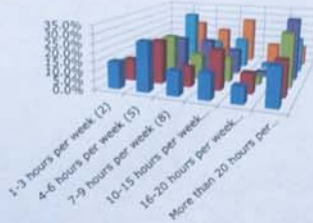
To effectively manage expectations during a bulletin board focus group you must do two things: 1)



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2 Q.1 On average, how many hours per week do you spend participating in outdoor activities at Arizona parks?



2 Q.1 On average, how many hours per week do you spend participating in outdoor activities at Arizona parks?
 Under \$30K



- 1-3 hours per week (2)
- 4-6 hours per week (5)
- 7-9 hours per week (6)
- 10-15 hours per week (12.5)
- 16-20 hours per week (18)

- Under \$30K
- \$30K to \$39K
- \$40K to \$49K
- \$50K to \$59K
- \$60K to \$74K
- \$75K to \$99K

Q.2 Agreement with the following statement:

TOTAL ANSWERING	Gender				
	TOTAL	Male	Female	Under \$30K	\$30K to \$39K
Agree (10)	400	240	160	120	120
Slightly agree (4)	240	160	80	80	80
Disagree (2)	120	80	40	40	40
Strongly disagree (1)	60	40	20	20	20
MEAN	13.2	11.4	14.3	8	17.4
STANDARD DEVIATION	2.75	2.66	2.77	6.2	1.8
STANDARD ERROR	0.02	0.04	0.06	0.08	0.11

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establish the expectations early on and 2) continuously reinforce them throughout the focus group.

Establishing expectations. You should introduce as early as possible the expectation that respondents participate in the discussion. Ideally, you should introduce it during the recruitment by addressing it in either the recruitment e-mail or the recruitment phone script.

Present the expectations in a way that unambiguously imprints them in the minds of participants. Don't simply mention them in passing. Rather, you should emphatically highlight them by dedicating a full paragraph to laying them out. For example:

"During this discussion board focus group we will post questions twice a day and we will expect two things of you. First, we want you to provide your own response to each question. Second, we want you to engage in a lively discussion with other participants in which you comment on each other's answers, pose questions to each other and, when appropriate, challenge each other. It is through such discussion that we will obtain the greatest insights – and therefore the greatest value – from the board."

Continuously reinforce expectations. Once you have established expectations, reinforce them throughout the remainder of the project. There are several opportunities for doing this.

You can reinforce them in every correspondence prior to the beginning of the project (e.g., when you e-mail participation instructions or start-date reminders) and by embedding a reminder every time you post a new set of questions. You can also reinforce them on an individual basis by monitoring respondents and privately requesting that those who aren't participating join the discussion.

Managing expectations will go a long way toward improving the quality of the discussion on your boards.

Bonus incentive

In addition to managing expectations, participants can be motivated to participate in discussion via a bonus incentive. For example, you might hold a competition that rewards the three participants who provide the highest-quality feedback with a bonus incentive of \$75.

A bonus incentive will impact each person differently. Some will be highly motivated to escalate their participation

in order to win the bonus, some will be moderately motivated and others will not at all be motivated.

A note of caution: You should expect to have one or two participants who take a quantity-over-quality approach to win the bonus incentive. Such people might, for example, copy and paste the same generic query onto the responses of 10 other participants. This dilutes the quality and depth of the discussion and should be discouraged by simply sending these participants a private note requesting that they readjust their approach and focus on posting fewer queries that take a more in-depth, personalized approach.

Finally, offering a bonus incentive provides a secondary benefit of serving as another point of communication that reinforces the importance of engaging in discussion during the board.

Ask only a manageable number of questions

Another way to optimize the group discussion is to ensure that the number of questions you ask remains manageable and doesn't overwhelm participants.

Discussion board focus groups pose the constant risk of overwhelming respondents with too many questions. As the board progresses, new insights emerge that raise additional questions in the minds of both clients and moderators. In response, both parties are tempted to add new probes to each subsequent set of questions. If several questions are added to two, three or four consecutive sets of questions, respondents can easily begin to feel that they are giving much more time and energy than expected. To deal with the burden that these additional questions bring they may begin to skimp on the discussion.

Be vigilant – consider whether you really need to add a question. If you do, make an effort to trim others from the list.

Engage participants

Finally, you can increase the likelihood that respondents participate in discussion by engaging them.

Engaging participants yields tremendous benefits. When people become engaged during a bulletin board focus group they become so deeply involved in the conversation that they forget themselves and spend more time – and provide more thorough and revealing responses – than you'd ever imagine.

There are two basic levels of engaging people in the context of a bulletin board focus group: personal and intellectual.

To some extent we all engage both ways. However, many people are predisposed to one way or the other. Consequently, you're going to have both types represented in any given bulletin board focus group. For this reason, it's best to employ strategies that engage participants personally and intellectually.

Engaging on a personal level. We become engaged on a personal level when we connect with another person. What generates this feeling? A variety of things, such as having another person acknowledge something unique about us; identify points of similarity with us; or express interest in or appreciation for some quality that we possess.

As a moderator, you can generate this personal connection between yourself and participants using the following process.

First, elicit personal information about each participant. It is best to do this with the very first set of questions that you post. You might ask questions about their families, their hobbies, places they've lived, etc.

Once you have this information, react to it in a way that facilitates this feeling of connection. As stated above, you do this by acknowledging something unique about them, identifying points of similarity that you share or simply by expressing interest or appreciation.

Invest the time and effort to do this with every respondent. And you should do it as genuinely as possible to optimize the likelihood that you will engage as many people as you can.

While I've described how you can generate the feeling of connection between yourself and your participants, it's important to keep in mind that you also can generate a feeling of connection between participants. This is an equally valid and effective way to get them engaged personally.

You can do this by forming your initial questions so that participants share their personal information with each other rather than with you. For example, perhaps with your first question you ask people to describe their top three-to-five hobbies and in the second question you ask them to read each other's responses and reach out to those who have similar interests to find out how and why they initially got involved in that hobby.

Table 1: Impact of Masking on Discussion

Question Category	When Respondents See Each Others' Responses	Impact on Discussion
Masked	Never	No impact
Partially-masked	After submitting their own response	Some impact
Unmasked	Prior to submitting their own response	Optimal impact

Engaging on an intellectual level.

People who are predisposed to engage intellectually become engaged when they use their minds to analyze a subject, formulate a perspective, articulate that perspective logically and then express it orally or in writing. And they especially become engaged when the subject interests them deeply.

One strategy for engaging people on an intellectual level during a bulletin board focus group is to optimize the number of unmasked questions.

What is an unmasked question? Most bulletin board platforms allow moderators to categorize each question as fully-masked, partially-masked or unmasked. With a fully-masked question, the participant's response is never seen by others. With a partially-masked question, each respondent sees the responses of others only after s/he submits his or her own response. And with an unmasked question, respondents are allowed to see others' responses prior to submitting their own.

Many moderators make the mistake of making all questions partially-masked. While in the abstract this can sound like a great strategy for eliminating any kind of peer bias, it also can kill discussion. If respondents are unable to read the responses of others prior to submitting their own initial response, it tends to decrease the likelihood that they will actually take the time to read others' responses and respond to them; there is a tendency to submit their answer and move on to the next question (Table 1).

However, if questions are unmasked and respondents are able to browse other participants' responses prior to submitting their answers, then they are far more likely to be drawn into the discussion by being engaged intellectually before submitting their answers. If they are allowed to read others' responses first, this can be a catalyst for drawing them into the discussion as their passions are ignited and they seek to present their own viewpoint.

Another approach is to ask debate-style questions early on in the discus-

sion. People who engage intellectually tend to enjoy debate. To design an engaging debate question, take the overall topic of the board, select an aspect of that topic that is controversial or for which people tend to hold deep, strong opinions. Then simply ask participants

to state their position and defend it.

Optimizing the value

By managing a bulletin board focus group in this strategic manner and striving to achieve these four objectives, we can ensure that we are generating lots of discussion and optimizing the value generated by the focus group. ①

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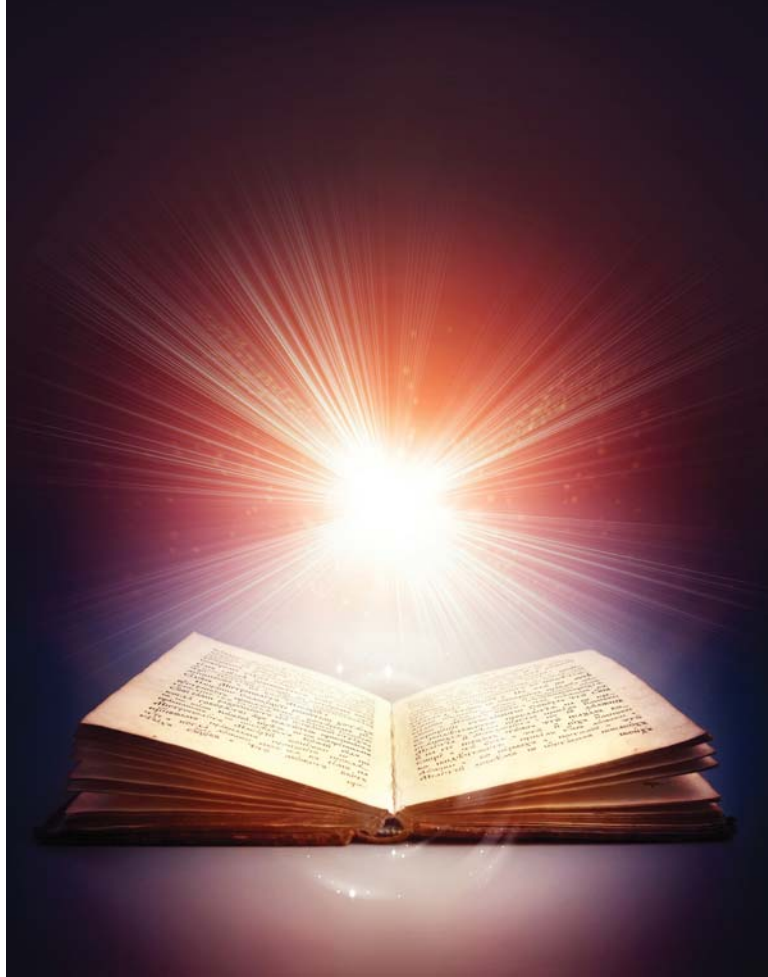
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A researcher's guide to storytelling

Using stories to deliver more effective takeaways to research clients

| By Ted Frank



snapshot

Understanding the components of a great story and learning how to execute them can bring depth to research presentations.

I recently received a frantic e-mail from a client who said her boss wants all researchers and strategists “to raise their level of storytelling. Now!”

“I don’t even know what that means,” she wrote. “I don’t think he does either. No one does. But we still have to do it. It’s total garbage!”

I agree with her. And I’m a storyteller.

There are many reasons for the buzz and I agree with many of those as well. Most opinions lean toward clients needing relief from all the data that overwhelms and paralyzes them. With the title of their book, *Drinking from the Fire Hose*, Christopher Frank and Paul Magnone struck the right metaphor for the client’s data analysis experience. Researchers want that hose pressure to be eased so they can actually savor and digest their insights. Through storytelling, they hope to find that.

Unfortunately though, storytelling, like most other buzzwords in their heyday, is in that hype period where everyone’s talking about it yet no one’s really saying anything substantial about how to effectively tell an insights story or how it can help clients and further goals.

That’s what this article is all about.

Done right, stories can accomplish a great deal more than just turning down the fire hose so clients can understand their data. They can also help connect with clients emotionally and make them believe in the insights enough to move forward and inspire their teams.

Just look at how movies affect us. They make us question our beliefs, even cry. Movies make us admire and sometimes emulate their heroes, quoting dialogue years later – and all in about the same amount of time as the average consumer insights presentation. Yes, they are different but that doesn’t mean you can’t borrow some movie techniques and work them into your reports. It’s actually easier than you might imagine and combining them will absolutely provide the understandability of the low-pressure hose and the memorability and emotional power of a movie. In other words, the story your clients are really looking for.

But enough of my buzz. Let’s start with some real understanding:



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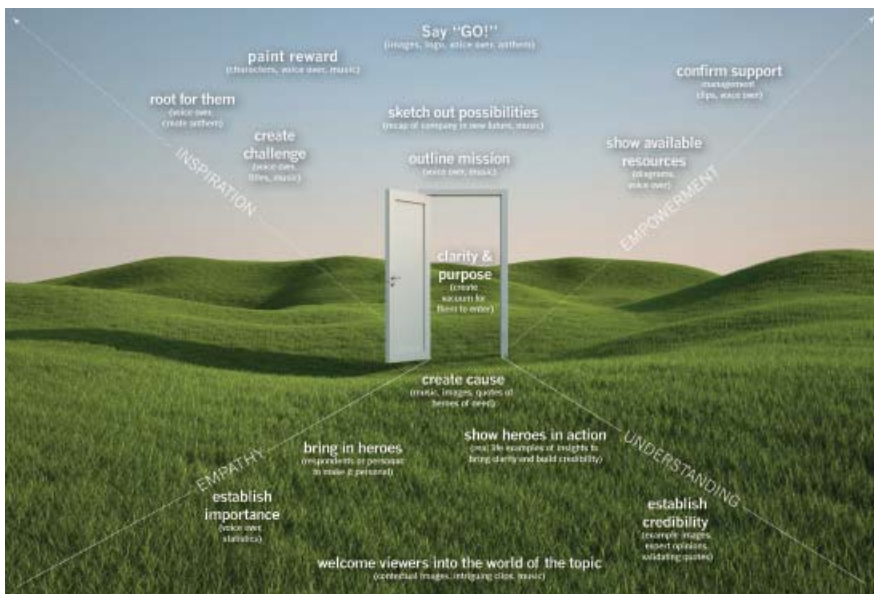


Figure 1: A door metaphor for the story map is useful for drawing stakeholders into the topic at hand, as it serves as both an entryway and a helpful organizing guide.

There are three main ways you can deliver a story in the consumer insights world:

Storytelling is what most are attempting to do right now: turning insights into a narrative and delivering it orally, usually with some slides to help. With good storytelling, the intimacy and sincerity created can make it the most effective method of all. But you have to be an amazing storyteller to pull it off. Also, because it relies on a storyteller, it's not very portable or spreadable.

Story-showing is letting characters, scenery, music and symbols do the storytelling for you. It's what you get when you go to the movies but can also be delivered in a well-done deliverable, like a video. Because it's an offering clients can put on their computers and pass on, it's also inherently more portable and spreadable throughout a corporation.

Story-staging is when you craft an experience that emotionally impresses your clients in a way that allows them to form their own story. You see this in interactive exhibits, workshops and ideations, but it is rare that they make the impact they could. Successful story-staging can be so effective that your clients not only get it but they actually embody the insights so the next step of moving to action feels natural for them. Of the three types of storytelling, it has the potential to be the most powerful but also takes the most thought. Story-staging usually

works best when you only have one or two points to make. There are some fine examples of story-staging in the Heath brothers' book *Switch* (my favorite is Jon Stegner's gloves on page 12, which is actually brought in from another book, *The Heart of Change* by John Kotter and Dan Cohen).

Have a plan

Before you start your story, it helps to have a plan. And like marketing, that plan starts with understanding the rational and emotional needs of the clients and stakeholders you're trying to move; deciding what key impressions and messages you want them to come away with; and delivering the story in a way that feeds their senses and leaves them fulfilled but always wanting more.

As I said, it's a lot like marketing. In fact, successful storytelling employs a lot of the tools you use every day. For example, segmentation to discern the difference in the learning style of a CMO who needs you to cut to the chase from that of an ad agency that needs an experience emotional enough to build empathy with consumers and feel their aspirations without telling them what to do. And then of course there are the needs of the project. Do the clients and stakeholders you are presenting to need to explore, define, make a decision? Thoughtfully considering the ways your audience members naturally learn and use your insights will help you decide the right kind of story to tell.

Like any brand positioning, it helps to decide what you want the client to take away – not what you're going to tell them but what you want them to say to someone who asks later. What they say will likely be only two or three pieces of information or impressions. After all, there is so much we can remember and even less we can pass on. Deciding ahead of time what you would like those takeaways to be will help guide your story.

Finally, delivering those takeaways in a way that engages the senses can truly create the transformative experience you're looking for. Hearing the word "cookies" is one thing. Seeing a photo of them with chocolate oozing out of them is another. And smelling them fresh out of the oven? There's no comparison. Sensory techniques heighten the experience along with your credibility because you're telling, showing and sharing, so the onus is not all on you to create the impression. The aroma will do it all. That said, you can still pique the imaginative senses simply with the written or spoken word.

Map out stories

Like professional screenwriters, storytellers find it immensely helpful to map out stories. Figure 1 is an example of how we mapped out a sample video on our Web site (www.backstoriesstudio.com/stratfull.html). The video details a fictitious strategy for Verizon (like you, we cannot show any of the real work we do).

Every map is different but they should all use both emotional and rational means to build the insights into a rallying cause – one that clients and stakeholders clearly understand, believe in and want to solve. Then we show them the door through which they can enter the story.

In talking with client-side insights professionals and stakeholders over the years, I've learned that the door is as common and vital a need as is protection from the fire hose. The clients want to make insight-driven decisions but before they can do that with confidence and passion, they need to be walked to the door.

Amplify your impact

Whether you are telling, showing or staging a story, there are some com-

mon techniques that can amplify your impact exponentially. None come easy at first but with rehearsal and experience, they can become second nature.

Experiential

Your audience wants to be transported away from the conference room and into the world of your story. But they will need help to fire up their emotions and imagination.

Telling

Lay out the scenes, characters and actions in the most simple, visual and familiar way (either through common experience or metaphor). Attention to detail is key. For a terrific example, listen how Garrison Keillor lays out Lake Wobegon and all its inhabitants. Tell me if you can't smell and taste the rhubarb pie. Using gestures, voices and inflection can also keep your clients engaged and in your world. I'm not suggesting you become a comedian but watching how comedians and other performers use these tools to tell stories can be eye-opening – and funny.

Showing

Images that show instead of tell can bring the audience closer to what you want to say – at lightning speed. The word “fish” can evoke visions of anything from a goldfish in a bowl to a shark in the ocean to a plate of teriyaki salmon. Showing the fish you're talking about will eliminate that ambiguity. Showing also creates a more conclusive and lasting impression. If a respondent for your TV remote-control project says, “I fumble with the buttons because there are so many of them,” shooting a video of them spending two whole minutes trying to locate the mute key will make your clients feel the consumer's frustration much more effectively than only talking about it.

Staging

Even more than watching consumers fumble, you could set up a line of TV sets, chairs and coffee tables with a remote on each table – one from every model in your competitive set. Then ask executives to sit down and race to see who can find and record the next episode of *Modern Family*

or search for a movie with Natalie Portman. Within 30 seconds, they'll feel it more deeply.

Characters

In insights and strategy, characters are usually the respondents or personas. Either way, they are terrific vehicles for making your story accessible, easy to follow, memorable and sharable. They can also be used to differentiate one point from another. Hollywood does this very well. Screenwriters create character webs to map out charac-

ter traits. They then look for opportunities to accentuate them. For instance, a “good” character can make an “evil” character seem more evil just by juxtaposing them. You can do the same thing with segmentation work and amplify both differences and commonalities.

Telling

Finding human examples of each of your points will personify them and make you more credible. I learned this once when having to relay bad news to a client who wanted feedback on their



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company's ground lunch meat. We had to say, "Consumers told us over and over again that it looked like dog food." It was that overwhelming. Although we gave many suggestions on how to fix it, they never hired us again. So from now on, any significant point I make comes with characters to back me up.

Showing

Similarly, nothing will communicate faster and with more credibility than having someone exemplify your insight. This is why on our map in Figure 1 you'll find both "bring in heroes" and "show heroes in action." Having heroes that show their experiences and needs gives clients someone they can feel for, stirs up their own emotions and stimulates their desire to help.

Staging

With this method the client can even become the character. Look for ways to bring them into the consumer experience so that it becomes their experience as well. This can be a

demonstration like with the TV remotes or a game where they role-play. We've also found success by giving clients smartphone apps right after a presentation so they can explore and manage situations like the consumers in the project, all the while competing against their teammates for greater understanding.

Symbols

Like characters, symbols are a vehicle for quick recall. And every important character should have a symbol. Circular glasses immediately conjure up images of John Lennon. And who doesn't flinch when they see that creepy mask from *Halloween*? It doesn't have to be evocative (but is more powerful if it is), just prominent and repeated enough to make the connection.

Telling

Simply holding a symbol up as you speak, setting it down and coming back to it later can bring your audience right to that spot where you left off.

Showing

Similarly, showing the symbol on its own and then with the character will reinforce its impact and connection. Having the symbol show up in other materials or giving your clients an actual set will further cement its messages.

Staging

Giving clients the ability to hold and interact with the symbol takes it further and can sometimes help them form their own organic connection to it.

Tension

The key to drawing and holding clients into your story is managing the push and pull. It's what brings you to tears and sends your heart racing, makes you angry or joyous. For this reason, tension is one of storytellers' favorite tools. Since it and its components can be used similarly in each form, I will describe each one.

Suspense

Leaving gaps in your story is what sucks us all in. It breaks our trance and presents us with an uneasy void

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that we must fill. Will they? Won't they? What happens next? Sometimes accomplished with a simple pause, the audience members become like children at Christmas. The key, however, is all in the setup, which is why we don't put our door at the beginning of our map. You have to take the client there first.

Pace

Just like suspense, managing the pace of your story can drive emotions. A fast pace excites us or makes us fearful or overwhelmed. A slow pace can create feelings of intimacy or frustration or provide a nice break. You'll find pace affecting you in movies, songs and even sports. It's why the pitcher and batter are so crucial to the drama of baseball.

Music

Nothing helps me control pace and evoke emotion as powerfully as music. It's like a direct flight to the heart and the quickest way to bind everyone in the audience. We use music in four main ways: we use


expansive, medium-paced music when we want to open up a new idea or introduce a person; we use slow, heartfelt music when we want clients to emotionally bond; we use meandering or confining music when we want to evoke uneasiness or frustration; and we use driving beats and strums when we want to inspire and build excitement. The Verizon mapping video features examples of these music types: expansive when we introduce Max (4:35); confining when he fumbles with his iPod in the car (6:03); and driving when we go in-depth into Project Flow (9:30).

Framing

In story-showing media, like video or photos, you can see this as a zoom or a punch in. For an example, check out the phone call Max has with his wife in the sample video (8:34). We punched into this face to help viewers feel his embarrassment. But you can also use the framing technique in storytelling and story-staging by proximity to the audience. It's why politicians go into the crowd when

they want to be heartfelt but stand back when they want to be heroic.

Wanting more

There are, of course, many more storytelling techniques and hopefully, as the axiom goes, I've left you wanting more. Try these to start and see what the real buzz is all about. Even if you only incorporate a few techniques you should see a big leap in the reception your stories get and in your relationship with your clients. It's also a whole lot of fun. 

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The face-to-face interface

Appreciating the value of traditional research in a digital world

| By Stephen Turner



snapshot

This article details the benefits unique to face-to-face research, including group bonding and access to nonverbal cues and metadata.

The Internet has, in a few short years, redefined our abilities to reach diverse segments of people where they live and work either as a batch or real-time process. Thanks to consumer-level proliferation of broadband connectivity, Webcams, smartphones and the like, we can conduct complex interviews with dispersed and even rare samples of respondents using audio and visual communications of considerable fidelity. There is no question that this is a great step forward for our discipline.

But, in the midst of this rush to capitalize on the efficiencies of digital research, I want to cast some words of serious caution. My intent is not to denigrate the Internet as a research tool but to remind the reader that it does not erase the need to gather face-to-face data in pursuit of understanding human beings. My thesis is that our work isn't fully done until we sit across the table from those we wish to understand – physically in their presence as we engage in discourse about their needs and interests.

Not the first time

This is not the first time, incidentally, that our industry has encountered such issues. In the first half of the 20th century, opinion polling (the forerunner of marketing research) was conducted largely by canvassing sampled neighborhoods on foot, with rigid rules about which households you should stop at and with whom you were to speak when you got there. But the efficiencies of mail and telephone surveys were too seductive to continue relying solely on a face-to-face approach.

Furthermore, it was clear almost from the onset that mail and phone studies each had its own set of limitations and biases. Mail surveys allowed you to provide visual stimuli but you had little control over who answered, when and with what sorts of preparation. Additionally, it was all but impossible to stop people from backtracking or otherwise distorting the order in which they answered questions. Phone surveys solved some of these problems but had their own issues to contend with – no visuals, for example, unless they were distributed beforehand. But more troublesome was the temporal imperative to answer the questions in relatively short order whether you understood the question or had the wherewithal to answer. Each approach had advantages but



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An extraordinary tool

In comparison, the Internet is an extraordinary tool. It can be used in so many different ways – from analyzing content that flows on its own (e.g., blogs, reviews, social media) to various synchronous and asynchronous querying techniques from chat boards to online focus groups, which simulate face-to-face encounters with considerable precision. And with today's smart mobile devices, respondents can take the interview with them – into their homes where they're comfortable or to the store where they can describe what goes through their heads as they weigh their options.

However, like all of the new techniques before it, there is still an important body of information left on the table, even as our technological skills bring us closer to the experience of face-to-face communications. My sense is that Marshall McLuhan's phrase, "The medium is the message," is as relevant to Internet-based research as it was to the advent of TV when McLuhan's *Understanding Media: The Extensions of Man* was published in 1964. Indeed, I am absolutely sure it is.

A social animal

Man is a social animal. Parts of our brains have evolved over many millennia to attend to communications that take place on levels other than verbal. There are thousands of scientific articles attesting to the fact that a lot of what we "say" to each other is transmitted via all of our senses in ways so nuanced as to defy verbal recognition.

Moms and infants communicate with each other long before language forms for the little one. Adults recognize others' dispositions and moods instantly without knowing exactly how or why. Experts in nonverbal communication tell us how to recognize when people are lying, just nervous or, perhaps, romantically inclined. In Malcolm Gladwell's *Blink*, he describes peoples' abilities to make good decisions instantly even when high-level cognitions tell them to do otherwise – decisions made on the basis of nonverbal communication.

The effects of nonverbal cognition are an important part of social and personal understanding. Today's brain scientists tell us that we echo the appropriate emotions of others whom we are watching.

We experience genuine fear and excitement and sadness and anxiety as we observe others in situations manifesting those emotions. So it happens that group behavior ebbs and flows with a rhythm that is interconnected among group members in ways that cannot be explained as an aggregate of individuals' isolated thoughts and feelings. Say what you will about groupthink, the truth is that we think and behave as groups in real life. We are an inherently social species.

Taken in context

When you have a group discussion in a face-to-face environment, interactions take place on an entirely different level than they do in an Internet-based focus group. Interactions in digital groups take place on the basis of literal interpretations of what is being said. Interactions in a face-to-face group are based on literal communications taken in the context of a continuous flow and interpretation of descriptive metadata (having to do with how the information was delivered) – information our brains have come to understand and over the past million-or-so years. Such modifications often yield very different sets of messages.

I'm not trying to say that moderators, even the best of them, are extraordinary in their ability to read all the subtle cues that emanate from face-to-face encounters. What I'm saying is that all of us are hardwired to do this. A good moderator is perhaps better tuned in to such vibes than most. He or she may not be a studied expert in turning covert communications into overt messages but has learned how to use that underlying current of information to arrive at a deeper sense of what someone is really trying to say.

A good moderator thinks carefully about the literal meaning of what someone is saying, modifies that literal meaning in the light of nonverbal cues and then – this is the key – asks the respondent to clarify the extent to which the moderator's interpretation of what was meant fits or doesn't fit the respondent's intended message. This is an iterative process and dramatically more effective in person than online.

Furthermore, and just as importantly, this same process is going on with everyone who is party to the conversation. Because we are human and because our brains are designed to attend to the flow of emotive cues that surround indi-

vidual pronouncements, our reactions to what someone says in our presence are continuously being modified and do not always track with a literal interpretation of what was actually mouthed. Despite the efforts of even the most rigid of moderators, those reactions enter into the dynamics of all group discussions.

The metadata

People posture. They do it all the time. They do it to convince others and themselves that they truly are the person they project. The interesting thing is that we're often more capable of – or at least willing to – acknowledge the pretenses of others than we are our own. Focus groups (as well as 12-step programs) make use of the fact that, as social animals, we sense when other people are misrepresenting themselves, perhaps because we are familiar with the same pattern in ourselves but also because we are all expert at attending to nonverbal cues that accompany the communication. Furthermore, it doesn't take long in a physical group setting for members to press each other to explain discrepancies between what they literally say and what they seem to be saying when one takes into account the metadata.

Unfortunately much of that metadata is missing when we interface digitally. In a face-to-face setting, micro-expressions that would never be seen on screen are readily apparent, such as eyes rolling back, a one-sided sneer, a particularly-intense rather than off-handed delivery – all things that fine-tune the intent of one's words. Body language is vivid. Hand gesticulations, submissive posture, a slight turn away from the listener or a cock of the head all add shades of meaning. Sighs, snorts, giggles, huffs and murmurs emphasize the emotional components of a viewpoint. Indeed, a host of marginal cues that may not be seen or felt in an Internet transmission are obvious in a face-to-face setting – perhaps to be considered at a low level of consciousness but nonetheless pertinent to interpreting an intended meaning.

And I'm only mentioning here things that are overtly apparent. Some communicators precluded from Internet representation entirely (e.g., odors, flop sweat, etc.) can modify how we interpret what literally spills from the mouth. Smell-O-Vision has been talked about for years but it isn't here yet.

Lost in transmission

It's not just odors, of course, that are lost in transmission. The sensing devices that feed remote interviews are, by-and-large, fixed in their focus. Cameras are generally trained on the face and upper torso and rarely offer acute details of either. Microphones also tend to be focused to filter out extraneous noise, blocking metadata in the process. Because almost all transmissions involve duplex communication, there is very little by way of useful sidebar information.

In a traditional, face-to-face focus group, I can direct my visual or audio focus anywhere I want at any time. If there's a sidebar event taking place, I can divert my attention from the primary conversation to the sidebar (and I can assure you that sidebars are frequently more interesting and relevant than the primaries). Doing this is all but impossible in a digital encounter where sidebar information, if present, is generally too indistinct or garbled to track.

A complete story

So, it happens that 40+ years of conducting marketing research studies of all

types have convinced me that face-to-face inquiry is an essential part of truly understanding peoples' thoughts, feelings and dispositions toward the products, services and communications we study in our work. To be sure, we can get a huge amount of reliable and valid information by carefully collecting data via the Internet but we won't have a complete story until we lace in some of the richness that comes only from sitting down across from someone in the physical world and talking things through.


The problem, of course, is that face-to-face work is expensive and time-consuming. It is especially difficult when you need to talk to people who are geographically dispersed. Still, I believe leaving out face-to-face work entirely is equivalent to the drunk who looks for his lost watch under a streetlamp because that's where the light's best.

What I wish to advocate here is that, as an industry, we develop hybrid approaches to research that include components suited to digital research in addition to substantial face-to-face work.

A goodly number of our clients are already marrying digital and face-to-

face approaches that transcend the sum of their parts to create new avenues of understanding. The surface is just being scratched, with new ways of using smartphones and tablets to gather personalized observations and bringing those observations into face-to-face settings. I believe these approaches have enormous promise for illuminating peoples' attitudes and motivations.

Not just words

But no matter how elegantly it is done, no matter how closely the medium mimics reality, I remain convinced that if you don't spend a good deal of time and energy on thoughtful discourse in the physical presence of your customers, you are never going to understand exactly what they are trying to tell you. Articulateness is not just a matter of words. It also comes from the way words are packaged and no emoticons – no matter how clever – can achieve the warmth of face-to-face interaction. 

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Happy (mostly) to be here

A report on the 2012 Quirk's salary survey of corporate researchers

| By Emily Goon

snapshot

The results of our annual salary survey show job satisfaction and likelihood to stay in a current position up, though client-side researchers acknowledge it's on them to stay flexible in this evolving industry.

For the fourth consecutive year, Quirk's has surveyed its audience of client-side researchers to take the temperature of the industry by tracking salary trends. While the 2010 and 2011 salary survey results showcased the market research industry's resiliency in a tough economy, 2012 seems to be a further improvement, with results indicating that client-side researchers are earning more, are sufficiently satisfied and more likely than ever to stay put.

The 2012 salary survey data is based on completed surveys from 1,287 full-time client-side researchers – our largest respondent pool to date. That level of response allowed us to achieve an interval of 2.6 at the 95 percent confidence level.

Different from last year, however, is the breakdown of job classifications. The 2010 and 2011 results indicated that those with the title senior vice president or vice president earned tens of thousands of dollars more than owners, presidents and CEOs (\$185,500 vs. \$152,000 in 2011; \$180,182 vs. \$124,364 in 2010). These curi-

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Total 2012 Compensation, By Region

Region	Base	Bonus	Other	Total
Northeast (CT, MA, ME, NH, RI, VT)	\$106,939	\$15,111	\$18,374	\$140,424
Mid-Atlantic (NJ, NY, PA)	\$110,763	\$10,942	\$21,679	\$143,384
East North Central (IL, IN, MI, OH, WI)	\$94,336	\$5,035	\$13,463	\$112,834
West North Central (IA, KS, MN, MO, NE, ND, SD)	\$91,321	\$3,069	\$9,053	\$103,443
South Atlantic (DC, DE, FL, GA, MD, NC, SC, VA, WV)	\$98,538	\$9,790	\$15,082	\$123,410
East South Central (AL, KY, MS, TN)	\$93,367	\$18,300	\$12,667	\$124,333
West South Central (AR, LA, OK, TX)	\$94,085	\$13,887	\$13,197	\$121,169
Mountain (AZ, CO, ID, MT, NM, NV, UT, WY)	\$92,051	\$3,525	\$7,746	\$103,322
Pacific Coast (AK, CA, HI, OR, WA)	\$120,121	\$9,177	\$16,250	\$145,548
Canada	\$88,370	\$2,926	\$7,630	\$98,926
Mexico*	\$39,500	\$1,000	\$1,000	\$41,500
Central and South America*	\$66,200	\$2,000	\$9,600	\$77,800
Eastern Europe*	\$22,400	\$0	\$3,400	\$25,800
Western Europe	\$102,143	\$4,929	\$15,857	\$122,929
Asia	\$69,474	\$39,526	\$32,316	\$141,316
Middle East*	\$128,143	\$11,143	\$18,286	\$157,571
Africa*	\$159,400	\$400	\$8,600	\$168,400
Australia/New Zealand*	\$111,500	\$250	\$3,500	\$115,250

* Fewer than 10 responses were received from these regions

Total 2012 Compensation, By Experience

Years of Experience in M.R.	Base	Bonus	Other	Total
< 1 year	\$62,125	\$750	\$5,542	\$68,417
1 - 2	\$62,680	\$5,133	\$4,400	\$72,213
3 - 5	\$71,217	\$3,422	\$5,944	\$80,584
6 - 10	\$89,170	\$4,822	\$12,027	\$106,019
11 - 15	\$104,518	\$4,467	\$12,133	\$121,118
16 - 25	\$122,667	\$17,745	\$21,033	\$161,444
>25	\$123,201	\$15,275	\$28,255	\$166,732

Total 2012 Compensation, By Degree Achieved

Highest Degree Achieved	Base	Bonus	Other	Total
High-school graduate	\$76,250	\$13,800	\$10,050	\$100,100
College graduate	\$88,300	\$8,138	\$14,888	\$111,326
Master's program graduate	\$106,486	\$9,539	\$14,813	\$130,839
Ph.D. graduate	\$117,397	\$7,551	\$16,513	\$141,462

ous findings inspired us to take a closer look at these big-money titles.

The 2012 salary survey separated owners and partners from presidents, CEOs and COOs and found that owners and partners are earning almost double that of presidents, CEOs and COOs (\$293,818 vs. \$149,200). A difference of almost \$150,000

is dramatic but not entirely befuddling, as it stands to reason that company owners and partners would be the best-compensated and the most highly-invested. It would appear that in the previous years, grouping owners with presidents and CEOs may have inaccurately inflated the salaries of presidents and CEOs.

Greater divide

However, we see now that there's an even greater divide between the pay of the head honcho and the No. 2. Senior vice presidents and vice presidents are making on average over \$100,000 more than those with a president/CEO/COO title (\$257,159 vs. \$149,200). These results have held fast over the past three years, though without any conclusive reason as to why. This could be unique to our sample and further analysis is needed. Though it is worth considering whether high-profile positions like president and CEO come with the prestige but not the pay.

Aside from these positions at the very top, the highest-earning client-side job titles are market research director or senior director (\$169,306), director of marketing (\$143,095) and business development (\$196,636 and higher than that of president/CEO/COO). Nearly half of all respondents classified their position as market research director or senior director (20 percent) or market research manager (29 percent). The next-most-selected title was senior research analyst at 10 percent, followed by research analyst at 9 percent.

Overall, client-side researchers are earning more, as the grand total for 2012 compensation by industry was \$124,009, compared to \$109,447 in 2011. The technology/IT/Web industry had the highest average at \$145,510, followed by consulting at \$144,095; food/beverage at \$143,721; advertising/public relations at \$140,424; and manufacturing at \$140,093.

Domestically, the biggest bucks are made on the coasts, specifically the West Coast (average salary of \$145,548) and New England (average salary of \$140,424 in the Northeast and \$143,384 in the mid-Atlantic region). Client-side researchers working internationally reported the highest salary, with \$168,400 in Africa and \$157,571 in the Middle East, though fewer than 10 responses were gathered for each of those regions.

The future looks bright for client-side earnings. In 2011, only 4 percent of respondents said that their base salary decreased in 2011 and the rest reported that their salary increased or stayed the same. The good news continues in 2012 as 3.77 percent of respondents reported a decrease in salary. The same percentage (25 percent) of respondents' salaries stayed

Total 2012 Compensation, By Industry

Industry	Base	Bonus	Other	Total
Advertising/Public Relations	\$98,155	\$9,451	\$20,732	\$140,424
Agriculture	\$99,923	\$5,154	\$10,692	\$115,769
Automotive	\$107,750	\$4,875	\$15,958	\$128,583
Banking/Financial	\$106,055	\$12,018	\$21,682	\$139,755
Building Materials/Products	\$70,333	\$0	\$3,667	\$74,000
Computer Hardware/Software	\$115,706	\$7,353	\$11,706	\$134,765
Construction/Housing	\$96,400	\$8,200	\$9,000	\$113,600
Consulting	\$104,571	\$12,619	\$26,905	\$144,095
Consumer Goods	\$110,034	\$13,874	\$15,924	\$139,832
Education	\$83,703	\$3,892	\$5,216	\$92,811
Entertainment	\$98,357	\$8,821	\$8,964	\$116,143
Food/Beverage	\$110,839	\$15,705	\$17,177	\$143,721
Government	\$93,077	\$0	\$846	\$93,923
Health Care/Pharmaceuticals	\$107,241	\$13,124	\$13,862	\$134,228
Hospitality (hotels, restaurants, etc.)	\$94,471	\$3,118	\$14,118	\$111,706
Insurance	\$99,132	\$3,434	\$15,461	\$118,026
Manufacturing	\$100,000	\$12,173	\$27,920	\$140,093
Media/Publishing/Information	\$94,358	\$3,049	\$11,259	\$108,667
Non-Profits	\$86,123	\$123	\$2,298	\$88,544
Retail	\$91,911	\$4,536	\$11,321	\$107,768
Technology/IT/Web	\$114,235	\$11,471	\$19,804	\$145,510
Telecommunications	\$103,160	\$17,160	\$14,680	\$135,000
Transportation	\$73,300	\$0	\$2,300	\$75,600
Travel	\$88,556	\$1,389	\$8,833	\$98,778
Utilities/Energy	\$94,356	\$11,800	\$12,644	\$118,800
Other	\$85,485	\$3,574	\$10,294	\$99,353

whose bonuses remained the same dropped from 54 percent in 2011 to 48 percent in 2012. The verbatim responses echoed these findings, confirming that bonuses are down:

"No bonuses were given in 2011. Received around 10 percent in past years."

"I work for a government agency and have not had a raise in five years."

"No raise or bonus in five years!"

"No bonuses were paid out due to poor company performance but I remain eligible for a bonus in 2012, depending on company performance."

"Salary freeze and furloughs since 2009."

And simply:

"I am a slave..."

Satisfaction about the same

But despite the vanishing bonus, satisfaction has stayed about the same overall, with 73 percent of respondents saying that they are somewhat satisfied (20 percent); satisfied (36 percent); or very satisfied (17 percent) with current employment, compared to 71 percent in 2011. Once again, the 2012 results indicate no link between job satisfaction and pay, only that those who are the most indifferent are paid the least. Those who gave a neutral response to the question of job satisfaction earned an average of \$113,064 and those who said they were somewhat dissatisfied earned \$107,746, compared to those who were very dissatisfied earning \$125,459; dissatisfied \$128,726; satisfied \$125,514; and very satisfied \$128,775. It seems money can't buy you love or job satisfaction, at least not in this industry!

In general, corporate researchers are less likely to seek new employment in 2012 than they were in 2011, with 15 percent somewhat likely to seek new employment; 7 percent likely; and 12 percent very likely. This is a 7 percent decrease from 2011, where 41 percent of respondents reported being somewhat likely, likely or very likely to seek new employment but is still an increase over the 2010 results where only 10 percent were very likely to seek new employment. Overall, though, client-side researchers seem more content, as 21 percent are very unlikely to seek new employment, compared to 13 percent in 2011. Of course, another driver could be the fear of trying to find a new job in a tight employment market. Though in looking at some of the verbatims,

How likely is it that your company will hire additional research employees in 2012?

Answer	Response	%
Very Unlikely	312	25%
Unlikely	204	16%
Somewhat Unlikely	131	11%
Undecided	120	10%
Somewhat Likely	201	16%
Likely	127	10%
Very Likely	147	12%
Total	1,242	100%

the same as in 2011 and the rest increased. While only 5.66 percent reported a salary increase of more than 10 percent, down from 8 percent in 2011, at least the majority of corporate researchers' salaries are headed in the right direction.

Unfortunately, bonuses took a slight hit as 18 percent reported a bonus decrease in 2012, compared to 10 percent in 2011. The percentage of researchers who reported a bonus increase stayed steady around 35 percent and those

Total 2012 Compensation, By Annual Revenue

Annual Revenue/Sales	Base	Bonus	Other	Total
< \$1 Million U.S. dollars	\$79,923	\$25,256	\$22,333	\$127,513
\$1M - \$3M	\$83,382	\$324	\$5,618	\$89,324
\$3M - \$6M	\$71,000	\$1,364	\$7,955	\$80,318
\$6M - \$10M	\$76,929	\$321	\$2,964	\$80,214
\$10M - \$50M	\$82,892	\$1,845	\$5,973	\$90,710
\$50M - \$100M	\$89,092	\$2,477	\$9,815	\$101,385
\$100M - \$300M	\$93,924	\$1,913	\$9,348	\$105,185
\$300M - \$500M	\$100,986	\$3,446	\$15,216	\$119,649
\$500M - \$1 Billion	\$99,303	\$6,462	\$10,714	\$116,479
>\$1 Billion U.S. dollars	\$112,219	\$14,175	\$20,554	\$146,947

Total 2012 Compensation, By Gender

Gender	Base	Bonus	Other	Total
Male	\$108,241	\$14,210	\$19,450	\$141,901
Female	\$94,427	\$5,148	\$11,426	\$111,000

many respondents indicated they were fairly new to their current positions, so perhaps job-switching isn't that difficult these days.

Additionally, there does not appear to be a correlation between how likely a researcher is to seek new employment and salary, as the average salary of someone very likely to seek new employment is over \$10,000 higher than someone very unlikely to seek new employment (\$120,787 vs. \$109,632). The highest-paid researchers fall somewhere in the middle, with an average salary of \$130,435 for those undecided about seeking new employment.

For those who do venture out looking for a new job, the percentage of companies likely to hire additional market research employees in 2012 is almost the same as 2011, with 16 percent somewhat likely to hire

additional employees; 10 percent likely; and 12 percent very likely. Unfortunately, it is still generally less likely for companies to bring on additional researchers, as 52 percent are very unlikely, unlikely or somewhat unlikely to do so, compared to 38 percent of companies very likely, likely or somewhat likely.

Experience and earning

In terms of qualifications, 2012 again showed a strong connection between experience and earning. The average salary for researchers with less than one year of experience is \$68,417, increasing to more than double that for researchers with over 25 years of experience (\$166,732). At 16 or more years of experience, researchers today could expect to earn over \$160,000 per year.

There is also a pattern similar to the

one seen in 2011 where more education does yield higher salaries, with a Ph.D.-holder earning over \$40,000 more than a researcher with a high-school diploma and \$30,000 more than someone with a bachelor's degree (\$141,462 with a Ph.D. vs. \$100,100 with a high-school diploma and \$111,326 with a college education). Fifty-seven percent of client-side researchers reported having a master's degree, the average salary for which is \$130,839, up from \$113,199 in 2011.

So if researchers are missing the bonus this year, they would be wise to further their education. However, certification courses don't seem to carry the same weight. Results showed a difference of only approximately \$4,000 in favor of those who hold a market research certification, which 20 percent of respondents reported having.

Loose and lithe

As the research industry continues to battle the recession and keep up with evolving technologies, researchers are aware that success depends greatly on their ability to stay loose and lithe. When asked about what skill set marketing researchers will need to possess in the coming years, the overarching theme seemed to be one of flexibility and adaptability:

"Innovation. Eagerness to try new methods."

"A large toolkit, knowing right method for problem (vs. an all-encompassing approach)."

"Flexibility with the continued presence of technology and social media impacting our companies, decision-making and research protocol and process."

"Adaptability to new methodologies and 'non-panel' data sources (e.g., customer

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Total 2012 Compensation, By Job Title

Job Title	Base	Bonus	Other	Total
Owner/Partner	\$149,091	\$83,909	\$60,818	\$293,818
President/CEO/COO	\$121,000	\$5,400	\$22,800	\$149,200
Senior Vice President or Vice President	\$173,683	\$34,175	\$49,302	\$257,159
Market Research Director/Senior Dir.	\$132,607	\$13,235	\$23,464	\$169,306
Market Research Manager	\$96,576	\$6,804	\$12,249	\$115,630
Account Executive/Manager	\$52,000	\$0	\$19,333	\$71,333
Customer Insights Manager	\$98,056	\$2,319	\$10,889	\$111,264
Director of Marketing	\$105,476	\$27,524	\$10,095	\$143,095
Marketing Manager	\$95,235	\$2,294	\$5,206	\$102,735
Brand Manager or Product Manager	\$75,778	\$3,667	\$5,000	\$84,444
Communications Director/Manager	\$66,800	\$3,200	\$5,800	\$75,800
Project Manager	\$75,513	\$1,231	\$7,436	\$84,179
Business Development	\$100,273	\$50,636	\$45,727	\$196,636
Senior Research Analyst	\$77,308	\$1,246	\$5,477	\$84,031
Research Analyst	\$58,641	\$479	\$2,111	\$61,231
Business/Market Analyst	\$69,667	\$8,806	\$7,528	\$86,000
Statistician	\$105,000	\$0	\$12,000	\$117,000
Research Assistant	\$36,800	\$600	\$800	\$38,200
Sales/Account Representative	\$92,000	\$4,500	\$19,000	\$115,500
Administrator/Coordinator	\$45,429	\$0	\$1,429	\$46,857
Consultant	\$92,000	\$333	\$6,000	\$98,333
Other	\$88,086	\$1,914	\$20,743	\$110,743


* Fewer than 10 responses were received for these titles

database, social, etc.).”

“Ability to adapt quickly to ever-changing business environment while also educating their customers on the importance of marketing research as a component that is necessary for overall business growth.”

“Adaptability and analytical skills.”

Slow but sure

The client-side salary survey results again show that research is on a slow but sure course for improvement, keeping its strong foothold in industries of all stripes. And with client-side researchers well aware of what’s required of them to keep up with the ever-changing landscape – thanks to new methods and technologies cropping up left and right – it’s exciting to think about what could be on the horizon. 

For more charts and graphs, see the online version of this article. Also, the June 25th Quirk’s e-newsletter will feature an article on the vendor-side salary survey. Visit quirks.com/salaries.aspx for a breakdown of compensation for client- and provider-side research job titles, including crosstabs by age, gender, location and more.



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Names of Note

■ **Research Now**, Plano, Texas, has appointed **John Rothwell** as executive vice president, supply, and as president of e-Rewards' portfolio companies; **Miles Worne** as chief strategy



Rothwell



Worne



Burge

officer and managing director, Europe, Middle East and Africa; and **James Burge** to its executive leadership team as managing director, Asia-Pacific.

Additionally, Research Now has promoted **John Tan** to executive vice president, global operations; and **Kate Svoboda** to vice president, operations. Svoboda will be based out of the company's Toronto office.



Tan



Svoboda

■ **Penske Truck Leasing**, Reading, Pa., has

promoted **Sherry Sanger** to senior vice president, marketing. Research will be among her responsibilities.

■ **Raymond Pettit** has been named chief research officer at **iTVX**, a New Rochelle, N.Y., metrics firm.



Pettit

■ **Edmonton**, Alberta, research company **Universal Survey Group** has hired **Kean Spencer** as vice president, business development; and **Mary Ellen Fasano** as vice president, account management.

■ **Thomas Gallagher** has joined New York research company **Ipsos Loyalty** as vice president, financial services.

■ **Insight Strategy Group**, New York, has promoted **Mia Scelsi** to associate director, operations; and **Andi Glick** to senior project manager. Additionally, the company has hired **Jillian Rodriguez** as creative writer.

■ **Victoria Chen** has joined **Bell Falla and Associates LLC**, a Norwalk, Conn., research company.



Chen

■ **Gavin Johnston** has joined **People Path LLC**, a Boulder, Colo., research company, as principal and strategist/anthropologist. Johnston will be based in Kansas City, Mo.



Johnston

■ **Quratulain**

Ibrahim has been promoted to CEO of **TNS-Aftab**, a Lahore, Pakistan, research company.

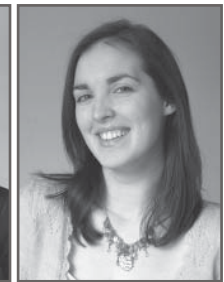
■ **Face Facts Research**, Leeds, U.K., has hired **Jackie Skillington** as field manager; **Chloe Emerson** as call center manager; and **Jennifer Garrick** as marketing manager.



Skillington



Emerson



Garrick

■ Atlanta research company **CMI** has hired **Donna Wydra** as senior vice president, consumer and shopper strategy.

■ **The Pert Group**, a Farmington, Conn., research company, has named **Doug Guion** president. The company has also hired **Patricia Bien** as senior account director, beverage; and **Jim Eschrich** as director, qualitative research. Eschrich will be based in Kansas City, Mo.

■ **Vancouver**, B.C., research company **Vision Critical** has named **Scott Miller** president and COO, international business.

■ **Neil Phillips** has joined New York research company **WorldOne** as vice president, quality. Phillips will be based in London.

■ **Robert Moran** has been named partner of New York communications company *Brunswick Group*. Moran will be based in Washington, D.C., and will direct the firm's insights and opinion research practice in the Americas.

■ *MarketVision Research*, Cincinnati, has hired **Roula Constantine** as qualitative research consultant; **Jim Huttenberger** as vice president, West Coast; and **Tom Donnelly** as research director.

■ **Anjul Sharma** has been named global director, qualitative research, at *Radius Global Market Research*, New York. Sharma will be based in London.



Sharma

■ *M/A/R/C Research*, Irvine, Texas, has promoted **Susan Hanks** to senior vice president.

■ *Gongos Research*, Auburn Hills, Mich., has hired **Debra Pomorski** as vice president, finance and administration; and promoted **Cindy Boozer** to finance manager.

■ **James Turner** has been named managing director, U.K., of Washington, D.C., research company *StrategyOne*. Turner will be based in London.

■ **Martin Filz** has joined *Global Market Insite Inc.*, a Bellevue, Wash., research company, as managing director, Europe, Middle East and Africa.

■ Edison, N.J., research company *Schlesinger Associates* has hired **Anne Hedde** as managing director, *Schlesinger Interactive*.

■ **Jake Katz** has been named chief architect at New York research company *Ypulse*.

■ Reston, Va., research company *comScore Inc.* has appointed **Beth Uyenco** as senior vice president,

international research. Uyenco will be based in Chicago.

■ Cincinnati research company *Burke, Inc.* has promoted **Ken Strunk** to vice president, data collection services.



Strunk

■ Rochester, N.Y., research company *Harris Interactive* has restructured its executive team, naming **Eric Narowski**, CFO; **Marc Levin**, COO; **Mike de Vere**, CEO, U.S. business groups; and **Todd Myers**, COO, U.S. business groups.

■ **Mike Leahy** has been named president of Port Washington, N.Y., research company *The NPD Group's* Canadian market research business. Leahy will be based in Toronto.

■ **Karen Ring** has joined *GfK MRI Starch Advertising Research*, New York,

as vice president, research.

■ **Howard Parr** has been named group director, U.K., of Rhinebeck, N.Y., research company *Phoenix Healthcare*.

■ **Laura Atkinson** has been promoted to compliance manager at *Insight Research Group*, London.

■ New York research company *Ipsos Healthcare* has promoted **Frank Guo** to director, health care, China.

■ *Bazaarvoice*, an Austin, Texas, research company, has hired **Kelly Connery** as general manager, brands, North America; and **Matthew Schatz** as general manager, retail and emerging markets.

■ **Doug Pryor** has joined Saskatoon, Saskatchewan, research company *itracks'* business development team. The company has also promoted **Alan Mavretish** to vice president, client development.



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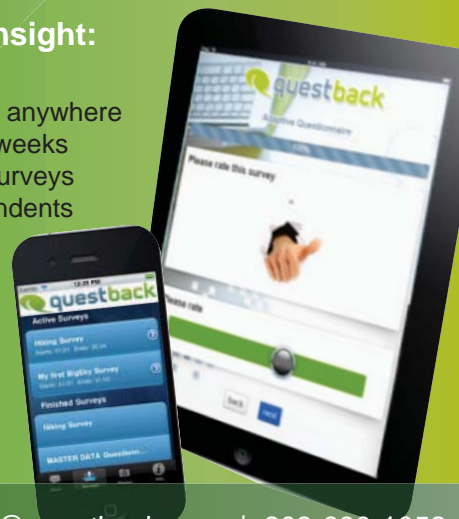
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Research Industry News

News notes

■ Columbia, Md., research company **Arbitron Inc.** has reached a \$7 million legal settlement with the Plumbers and Pipefitters Local Union Pension-Annuity Trust Fund regarding an April 2008 case alleging that Arbitron misled investors about the rollout of its Portable People Meter service.

Separately, Arbitron agreed to pay \$400,000 to settle a lawsuit with the Attorney General of the State of California, the Los Angeles City Attorney and the San Francisco City Attorney, in which Arbitron was alleged to have underrepresented black and Hispanic listeners in California, Los Angeles and San Francisco.

■ **The Federal Trade Commission** (FTC), Washington, D.C., has released Protecting Consumer Privacy, a report in which the FTC reaffirms its support for the development of a browser-based do-not-track online data collection opt-out.

Acquisitions/transactions

■ **Twitter**, San Francisco, has acquired social media analytics company **Hotspots.io** for an undisclosed sum. Hotspots' staff will join Twitter's revenue engineering team.

■ Cambridge, Mass., research company **Kantar Retail** has agreed to acquire a minority interest in **GME FZ LLC**, a Dubai, United Arab Emirates, management consultancy.

■ Washington, D.C., research company **Penn Schoen Berland** has acquired London research company **First Movies International**.

■ Montreal research company **Voxco** has acquired Paris research company **Sypiens** to develop mobile applications for its Acuity4 Social, Acuity4 Survey and Command Center solutions.

Alliances/strategic partnerships

■ Miami research company **Geoscape** and **Scarborough Research**, New York, have partnered to integrate Scarborough's PRIME Lingo data resources with the Geoscape Intelligence System. Geoscape subscribers who opt for the PRIME Lingo option will have access to all Scarborough studies, as well as Geoscape's Hispanicity segmentation.

■ Reston, Va., research company **comScore Inc.** has partnered with data management company **i360** to launch i360 Segments, which combine's i360's voter data with comScore's audience segmentation tool Segment Metrix 2.0.

■ New York researcher **The Nielsen Company** and New York brand protection company **AdSafe Media** have agreed to integrate AdSafe's ad safety ratings, contextual analysis and viewability measurement into Nielsen Online Campaign Ratings.

■ Paris research company **Ipsos** and Doha, Qatar, business group **Darwish Holding** have partnered to open an Ipsos office in Doha, dubbed **Ipsos Qatar**. Elie Nawar will serve as managing director.

■ New York research companies **BuzzBack** and **EyeTrackShop** have partnered to combine methodologies to allow marketers to evaluate packaging and communications.

Awards/rankings

■ The **Qualitative Research Consultants Association**, St. Paul, Minn., has selected a qualitative research study by Layla Shea of **Upwords Marketing Solutions** and her client,

The Crohn's and Colitis Foundation of Canada, to receive the Quality Award. The award recognizes and promotes excellence in qualitative research on an international level.

■ **The Advertising Research Foundation** (ARF), New York, has announced the winners of the 2012 David Ogilvy Awards, which celebrate the extraordinary and/or creative use of research in the advertising development processes of research firms, advertising agencies and advertisers. Among the winners are **Bank of America; Budweiser; Comedy Central;** Procter & Gamble's **CoverGirl, Olay** and **Vick's**; and ConAgra's **Hunt's, Tassimo** and **Verizon**.

Additionally, the ARF has honored Paris research company **Ipsos** with two Gold awards and one Quality in Research. For a full list of ARF Great Mind Awards winners visit www.thearf.org/great-mind-12.php.

New accounts/projects

■ Stockholm, Sweden, research company **Cint** has expanded its panel exchange platform OpinionHUB in Asia-Pacific with the addition of several partners, including **Nepa** in Sweden; **Tudou** in China; and **STAR TV Network** in India.

■ **Burger King Corp.**, Miami, Fla., has selected St. Albans, U.K., research company **SMG** to launch Guest Trac, a U.K. customer experience tracking program.

■ London research company **UKOM** has chosen Reston, Va., research company **comScore Inc.** as UKOM's partner for online media measurement in the U.K. The three-year contract begins in 2013.

■ Stamford, Conn., research company **Repucom International** has added Boston research company **Crimson Hexagon's** ForSight platform to its client offering.

■ U.K. TV network **ITV** has renewed

its custom panel contract with Surrey, U.K., research company **EasyInsites**. ITV has also expanded its Viewback panel to source from and represent viewers of ITV's daytime programs.

■ Richmond, Va., farm supply and service cooperative **Southern States Cooperative** has selected Herndon, Va., research company **Vovici's** enterprise feedback management solution to collect customer loyalty data.

■ Monterrey, Mexico, research company **Inmega Investigacion de Mercados** has become Montreal research company **Voxco's** exclusive distributor of Acuity4 Social in Mexico.

New companies/new divisions/relocations/expansions

■ **The Worldwide Independent Network (WIN)**, an Istanbul, Turkey, research network, has expanded to include **ORB** in the U.K.; **Marktest** in Portugal; **Motivation** in the Netherlands; **Romir** in Ukraine; **PSRC** in the Philippines, **Infosearch** in Thailand; **Joshua** in Singapore; **SRGB** in Bangladesh; and **GSC Research** in Mozambique.

■ Palo Alto, Calif., research software company **SurveyMonkey** has opened an operation in Brazil and named Rodolfo Ohl country manager.

■ New York research company **GroupM** has introduced its innovation unit GroupM Next. The division is online at www.groupmnext.com.

■ Princeton, N.J., research company **ORC International** has opened an office in Singapore.

■ Researchers Sean Case, Matthew Ronco, Baillie Buchanan and Carl Sayres have opened **Research For Good** in Redmond, Wash. The company's mission is to provide reliable, high-quality respondents while supporting registered charities and not-for-profits by making donations with every survey complete. The company is online at www.researchforgood.com.

■ Atlanta research company **Infosurv Inc.** has relocated its office to 980

Hammond Drive, Suite 720, Atlanta. All other contact information will remain the same.

■ New York research company **Millward Brown** has opened offices in Dubai, United Arab Emirates, and Lagos, Nigeria.

■ Miami research company **IBOPE Zogby** has renamed itself **IBOPE Inteligência**.

■ Steve Henke, former president of **20|20 Research**, Nashville, Tenn., has launched **Harpeth Marketing**, a Franklin, Tenn., research consulting firm. The company is online at www.harpethmarketing.com.

■ **Buffalo Communications**, a Vienna, Va., public relations company, has launched a research division called **Buffalo Strategy Services**. Michael Lengel has been appointed to lead the operation.

■ Elkins Park, Pa., language services company **CETRA Language Solutions**

has opened an office in Limerick, Ireland. CETRA Ireland Ltd. will operate as a wholly-owned subsidiary of CETRA Inc.

■ **Discovery Research Group**, Salt Lake City, has launched **Focalytic**, a Midvale, Utah, research company. Focalytic is online at www.focalytic.com.

Research company earnings/financial news

■ **The Nielsen Company** reported first-quarter 2012 revenue growth of 3 percent and net income of \$25 million, compared to a net loss of \$(181) million in first-quarter 2011.

■ **Tobii Technology**, Stockholm, Sweden, has closed a \$21 million funding round with investors Intel Capital, Amadeus Capital, Investor Growth Capital and Northzone Ventures. The funding will be used to continue R&D investments in core technology and to take eye-tracking and gaze interaction to mainstream computers and other mass-market applications.

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CALENDAR OF EVENTS

●●● can't-miss activities

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

Marcus Evans will host its life sciences market research conference on **June 19-21** in **Philadelphia**. For more information visit http://www.marcusevansch.com/LSMR_QMR.

The International Quality and Productivity Center will hold its annual shared service exchange on **June 24-26** in **Pinehurst, N.C.** For more information visit www.sharedserviceexchange.com.

The American Marketing Association will hold its annual advanced research techniques forum on **June 24-27** at the Westin Seattle in **Seattle**. For more information visit www.marketingpower.org.

featured

Research Innovation and ROI Inc. will hold a 90-minute remote training session, themed "Enhancing Executive Conversations for Maximum Impact," on **June 26** at 11:30 a.m. CDT. Cost to attend is \$199. Attendees will earn PRC credit hours. For more information visit <http://execcon.eventbrite.com>.

Worldwide Business

Research will hold a conference, themed "Luxury Interactive," on **June 26-27** at the Bridgewater in **New York**. For more information visit www.luxuryint.com.

Marcus Evans will hold its customer experience conference on **July 17-18** in **Chicago**. For more information visit http://www.marcusevansch.com/CEM_QMR.

IIR will hold a conference, themed "Shopper Insights in Action," on **July 18-20** at the Marriott Magnificent Mile in **Chicago**. For more information visit www.shopperinsightseven.com.

The Australian Market and Social Research Society will hold its annual national conference, themed "Looking Forward, Looking Back," on **September 6-7** at the MCEC Melbourne in **Melbourne, Australia**. For more information visit www.amsrs.com.au.

ESOMAR will hold its annual congress on **September 9-12** in **Atlanta**. For more information visit www.esomar.org.

The Marketing Research Association, Quirk's and the **Market Research Executive Board** will host the corporate researchers conference on **September 19-21** at the Fairmont **Dallas**. For more information visit www.marketingresearch.org.

The American Marketing Association will hold its annual marketing research

conference on **October 1-3** at the Bellagio Hotel and Casino in **Las Vegas**. For more information visit www.marketingpower.com.

The Shopper Technology Institute will hold its annual LEAD Marketing Conference on **October 1-3** at the Westin O'Hare in **Rosemont (Chicago), Ill.** The conference focuses on loyalty, engagement, analytics and digital applications. For more information visit www.leadmarketingconference.com or www.shoppertech.org.

The Qualitative Research Consultants Association will hold its annual conference on **October 3-5** at the Hyatt Regency in **Montreal**. For more information visit www.qrca.org.

The Council of American Survey Research Organizations will hold its annual conference on **October 8-11** at the Four Seasons Resort in **Scottsdale, Ariz.** For more information visit www.casro.org.

The Pharmaceutical Marketing Research Group will hold its annual meeting of The PMRG Institute, themed "Getting Ahead of the Curve – Advancing the Marketing Researcher," on **October 14-16** at the Sheraton Philadelphia Downtown Hotel in **Philadelphia**. For more information visit www.pmrg.org.

The 2012 **Ethnographic Praxis in Industry Conference**,

themed "Renewal," will be held on **October 14-17** at the Savannah College of Art and Design in **Savannah, Ga.** For more information visit www.epiconference.com/2012.

Research & Results will hold its annual conference on **October 24-25** at the MOC Convention Center in **Munich, Germany**. For more information visit www.research-results.com/trade-show/exhibitor-information.

ESOMAR will hold its 3D digital dimensions conference, themed "(Online + Social Media + Mobile) Research," on **November 4-6** in **Amsterdam, the Netherlands**. For more information visit www.esomar.org.

ESOMAR will hold its qualitative research conference, themed "Informing Strategic Decision Making and Action," on **November 6-8** in **Amsterdam, the Netherlands**. For more information visit www.esomar.org.

IIR will hold its annual conference, "The Market Research Event 2012," on **November 12-14** at the Boca Raton Resort and Club in **Boca Raton, Fla.** For more information visit www.themarketresearchevent.com.

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

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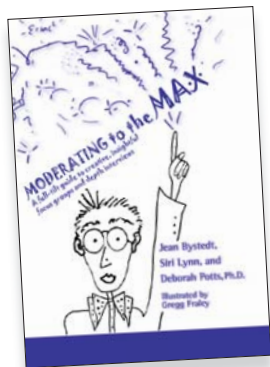
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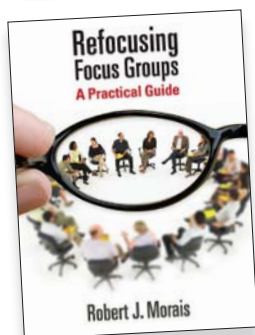
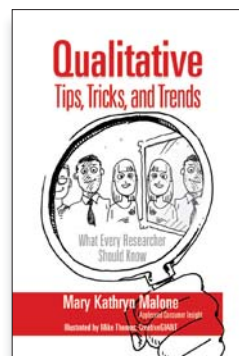
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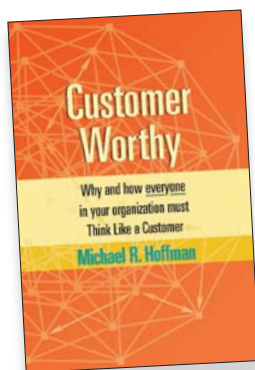
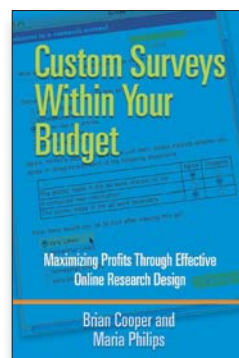
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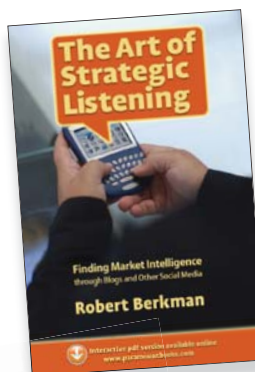
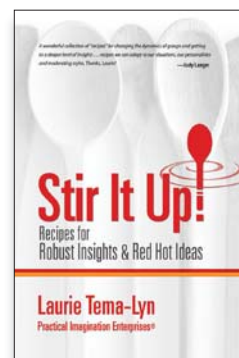
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Digital coupon users spend 49 percent more per year than the average shopper.

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"This research really illuminates the whys behind the ratings."

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RThe truth is that we think and behave as groups in real life.

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If researchers are missing the bonus this year, they would be wise to further their education.



Will we see you in September?

For the second year in a row, Quirk's, along with the Marketing Research Association and the Market Research Executive Board, is sponsoring the Corporate Researchers Conference on September 19-21 at the Fairmont Dallas, an event designed for corporate research practitioners, directors and executives supported by research and related services providers. The event will include presentations on leading the corporate research function, directing marketing research projects and real-world research. We hope to see you there! For more information visit www.marketingresearch.org.



More salary survey results to come!

This issue features the client-side results from our annual marketing research salary survey (page 56). The 2012 survey is based on feedback from over 3,000 respondents – our largest sample yet! Watch for the report on the provider-side results in our June 25th e-newsletter.

WIN ••• WIN ••• WIN ••• WIN ••• WIN



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To register, send an e-mail to contest@quirks.com with your complete contact information. Please include "ROI Contest" in the subject line. Deadline to enter is June 24, 2012. The winner will be selected at random and announced in the August issue of *Quirk's*.

Congratulations to April's winner, David Burton of David Burton Associates, Surrey, U.K. April's prize was a \$3,000 project credit with Toluna QuickSurveys.

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