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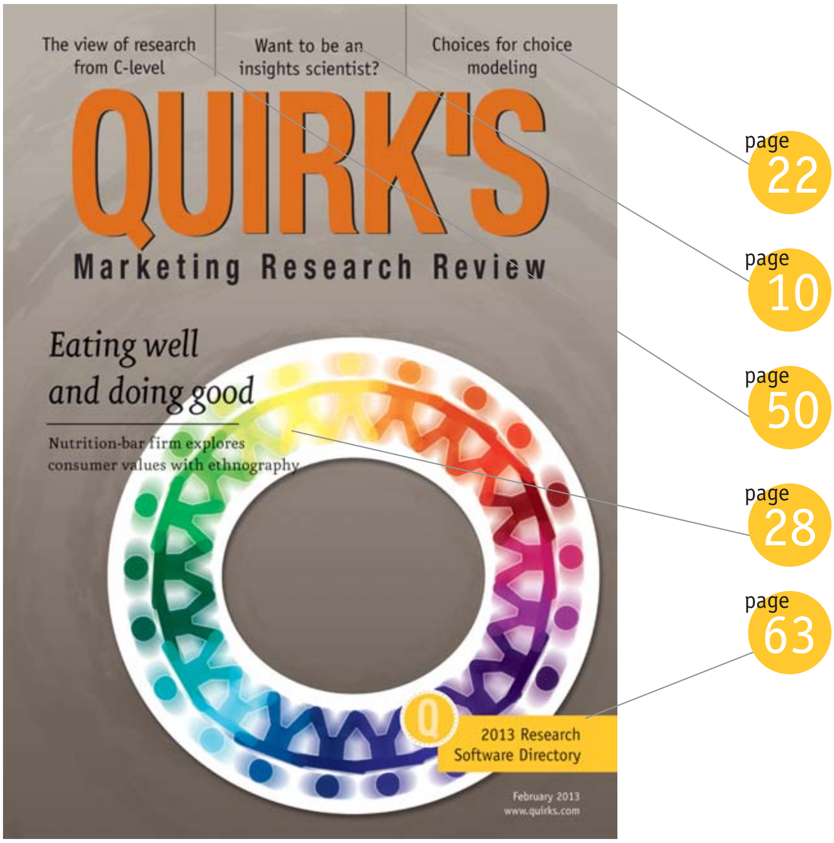
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Quirk's Marketing Research Review
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In Case You Missed It

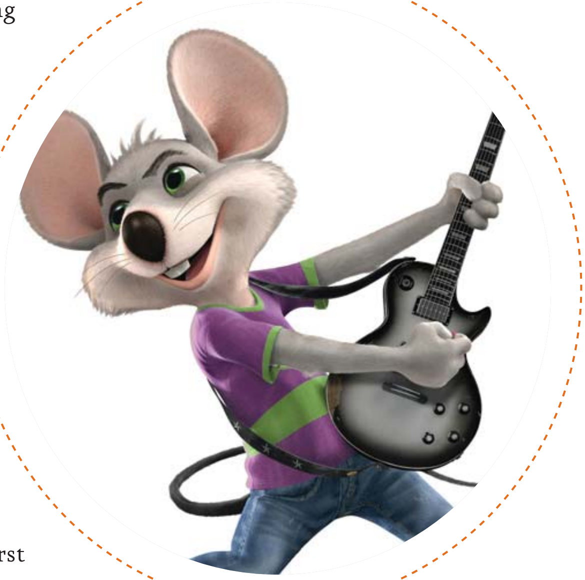
news and notes on marketing and research

••• brand research

Chuck E. Cheese's mascot makeover doesn't score with kids

Chuck E. Cheese gave its mascot a new look – and a guitar – as part of an image overhaul but since he made his July 2012 debut, the rebranding hasn't been all fun and games for the restaurant chain, according to Mark Brandau's November 29, 2012, article, "Chuck E. Cheese's mascot loses some consumer appeal," for *Nation's Restaurant News*.

The revamped mouse is part of a new marketing campaign aimed more directly at parents but research shows that Chuck E. has declined in appeal with children and their parents. According to the E-Score Character study from E-Poll Market Research, Encino, Calif., the new Chuck E.'s appeal with boys ages six to 12 dropped 11 percent to 46 percent. Among girls of the same age, his appeal fell from 57 percent to 49 percent. Increasing the appeal to those kids, especially boys, will be crucial for the chain in the future. "If the character improves the chain's image among boys, who are usually the first to reject something new, it stays hip longer," said Gerry Philpott, president and CEO of E-Poll.



E-Poll also reported a 28 percent drop in total awareness and a 9 percent drop in appeal when survey respondents were asked to compare the new Chuck E. with the mascot's previous version. Among the 1,500 mothers interviewed, 60 percent were aware of the old character while only 11 percent were aware of the new one. The change in mascots had a smaller effect on his appeal, as 26 percent of moms liked the old character and 24 percent liked the new character.

Failure to make inroads with mothers is not as big a concern as a drop in appeal with kids, said Philpott, because parents tend to go to whichever restaurants their children enjoy anyway.

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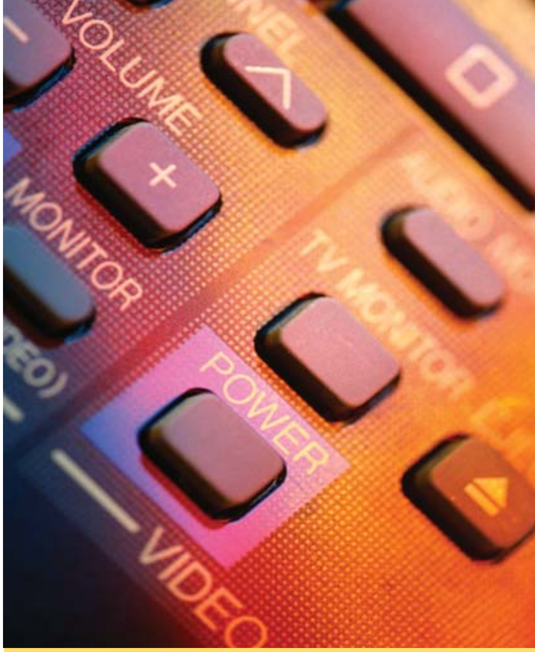

••• television research

Time-shifted TV viewing continued its rise in 2012

Sporting and live events ruled when it came to wooing U.S. TV viewers in 2012, as has been the case in recent years, but time-shifted viewing has been a boon for cable programming, playing a larger role in American TV-viewing in 2012 than ever before, according to data from New York researcher The Nielsen Company.

Only two scripted shows made the list of top-10 prime-time TV programs (*NCIS* and *Vegas*) but scripted programming dominated time-shifted viewing. In fact, cable shows comprised 90 percent of this year's list and all of the top time-shifted shows were scripted dramas.

Each program on the list of top 10 time-shifted TV programs of 2012 more than doubled its live viewership (*Breaking Bad*, 130 percent increase; *Mad Men*, 127 percent; *Warehouse 13*, 127 percent; *Covert Affairs*, 117 percent; *Suits*, 110 percent; *Justified*, 108 percent; *White Collar*, 108 percent; *Fringe*, 106 percent; *Sons of Anarchy*, 105 percent; and *American Horror Story*, 103 percent). In 2011, the highest gain was 90 percent, indicating that the use of DVRs and on-demand viewing is quickly becoming more popular.

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Know Why™

By Joseph Rydholm, Quirk's Editor

Are we ready to become scientists?

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Joe Rydholm can be reached at joe@quirks.com

Among the towering stacks of newspapers and magazines that weigh down the furniture in my office is a pile of recent issues of the *Harvard Business Review*. As with many of the publications I receive, I never have enough time to spend with each volume of the *HBR* and end up skimming the articles for the best nuggets. But every so often I come across one that demands a full reading.

The October issue featured a great piece by Thomas H. Davenport and D.J. Patil entitled "Data scientist: the sexiest job of the 21st century." As the marketing research industry continues to wring its collective hands over the impact of big data – How will it affect what we do? Will it render us obsolete? – articles like this one offer useful insights into where we may need to go if we want to remain an essential – rather than vestigial – discipline.

Granted, their version of a data scientist would have a much larger purview than "just" marketing research, looking instead at enterprise-level problems and projects.

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ID 20130202

And their insistence that anyone aspiring to data scientist status be a skilled computer code-writer might stop a number of marketing researchers, especially those who lean qualitative, at the door.

But in reading their thoughts on the skill set that data scientists should possess, I couldn't help but see parallels to our own situation:

More than anything, what data scientists do is make discoveries while swimming in data. It's their preferred method of navigating the world around them. At ease in the digital realm, they are able to bring structure to large quantities of formless data and make analysis possible. They identify rich data sources, join them with other, potentially incomplete data sources and clean the resulting set. In a competitive landscape where challenges keep changing and data never stop flowing, data scientists help decision makers shift from ad hoc analysis to an ongoing conversation with data ...

Data scientists' most basic, universal skill is the ability to write code. This may be less true in five years' time, when many more people will have the title "data scientist" on their business cards. More enduring will be the need for data scientists to communicate in language that all their stakeholders understand – and to demonstrate the special skills involved in storytelling with data, whether verbally, visually or – ideally – both.

But we would say the dominant trait among data scientists is an intense curiosity – a desire to go beneath the surface of a problem, find the questions at its heart and distill them into a very clear set of hypotheses that can be tested.

See what I mean? It's the same cluster of skills – ability to see the big picture; curiosity; good communicator; tech-savvy; empathy; a flair for storytelling – that I and other well-meaning nags have been prattling on about in recent months.

In the vanguard

As the buzz from *HBR* and other influential business information outlets grows louder, to the extent that you can promote yourself internally as someone who has those skills – or has ready access to a team of people who collectively have them – you can position yourself and your marketing research function as being in the vanguard (which is where we'd like to be) rather than bringing up the rear (which is where we are often perceived to be).

And to further seal the deal, maybe you can start bandying about a new preferred job title: insights scientist.

Minority is the New Majority.

This political season has proven what Opinion Access Corp. has known for years – the most influential groups of Americans are minorities who are growing in numbers and importance. Hispanics and African Americans are the new majority (just ask President Obama) and with the largest pool of Bilingual English/Spanish and African American interviewers both domestically and offshore, OAC can reach these groups, making us the most reliable resource for all your diversification data collection needs.

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••• mobile research

Disruptive but convenient

Users weigh the pros and cons of mobile technology

Some 85 percent of American adults now own a cell phone of some kind and these devices mean many things to their owners: an always-available link to friends and family, a pocket computer, a time-saving tool or even an actual telephone. However, all these benefits come with some drawbacks, according to a study from the Pew Internet and American Life Project, Washington, D.C. Mobile phone owners like the convenience and ease of connectivity but rue that they can be interrupted more easily, have to pay the bills and face bad connections.

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When asked to describe in their own words what they like most about owning a cell phone, 17 percent said the best thing about their phone is that it is convenient; 12 percent like the ability to call or talk with others at any time; 11 percent like that their cell phone can help them get assistance in an emergency; 9 percent favor using the Internet, e-mail or apps; and 8 percent like the ability to connect with family.

However, the convenience and constant connectivity these mobile devices offer also comes with a downside in the form of annoyances, interruptions and cost. When asked what they like least about owning a cell phone, 24 percent said the fact that they are constantly available and can be reached at any time. Fifteen percent said that the cost of cell ownership is the thing they like least; 12 percent cited problems with bad reception, poor signal or dropped calls; 8 percent dislike the battery life; and another 8 percent pointed to interruptions from telemarketers and other unwanted callers as their primary annoyance.

Overall, cell owners are far more likely to view their phone as a time-saver than as a time-waster. Some 33 percent of cell owners agreed that their phone saves them time because they can always access the information they need, while just 3 percent agreed that their phone costs them time because they are constantly being distracted or interrupted. The largest proportion of cell owners (56 percent) said that the time costs and time savings offered by cell phones pretty much balance each other out.

Cell owners are extremely attached to their phones, although most don't see that as too big of a problem. For many cell owners, their phone is an essential utility that they check frequently, keep close at all times and would have trouble functioning without. Over two-thirds find themselves checking their phone for messages, alerts or calls even – when they don't notice their phone ringing or vibrating. Some 18 percent said that they do this frequently. Forty-four percent have slept with their phone next to their bed because they wanted to make sure they didn't miss any calls, text messages or other updates during the night and 29 percent describe their cell phone as something they can't imagine living without.

Despite this connection to their devices, most don't worry too much (or get many complaints from their friends) about spending too much time with their phones. Eleven percent said that they themselves sometimes worry that they are spending too much time with their phone, while 12 percent said that people they

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know tell them that they are spending too much time using their phone.

Indeed, many cell owners hear complaints from friends that they don't devote enough time to monitoring their mobile communications. Thirty-nine percent said that people they know have complained because they don't respond promptly to phone calls or text messages and one-third said that people they know have complained because they don't check their phone frequently enough.

Mobile phone users see some drawbacks to cell ownership but in general are positive about the benefits that mobile connectivity provides. When asked to assess the impact of their cell phone on various aspects of daily life, cell owners see some clear benefits – particularly when it comes to maintaining connections to friends and family. Sixty-five percent said that their phone has made it a lot easier to stay in touch with the people they care about; 28 percent said that their phone has made it a lot easier to plan and schedule their daily routine; and 26 percent said that their phone has made it a lot easier to be productive while doing things like sitting in traffic or waiting in line.

On the other hand, relatively modest numbers of users see a downside to cell ownership in the form of increased distractions and difficulty disconnecting from work life. Nine percent said that their phone makes it a lot harder to disconnect from work life (this concern is particularly acute among cell owners in high-income households); 7 percent said that their phone makes it a lot harder to give people their undivided attention; and another 7 percent said that their phone makes it a lot harder to focus on a single task without being distracted.
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••• automotive research

Relying on reviews

Car shoppers consult the Web when selecting dealer

Nearly 80 percent of new-vehicle buyers use the Internet during their shopping process, among whom nearly one-third consult online ratings/review sites when selecting a dealer, according to a study from Westlake Village, Calif., research company J.D. Power and Associates. New-vehicle buyers are much more inclined to use a ratings/review site than a social networking site when selecting a dealer but satisfaction with the dealership experience is significantly higher among new-vehicle buyers who use social networking sites than among those who consult ratings/review sites.

Among new-vehicle buyers, males are significantly more likely than females to consult ratings/review sites, whereas females are significantly more likely to consult social networking sites. Both genders are equally likely to visit blogs, forums or social networking sites in general (7 percent each); however, females post considerably more positive online statements regarding their dealer experience than their male counterparts (86 percent indicate comments "mostly positive" vs. 77 percent, respectively).

The study analyzed the new-vehicle purchase experience and measured customer satisfaction with the selling dealer (satisfaction among buyers) and also measured satisfaction with brands and dealerships that were shopped but ultimately rejected in favor of the selling brand and dealership (satisfaction among rejecters). Among buyers, satisfaction was examined across four measures (listed in order of importance): working out the deal (17 percent); salesperson (13 percent); delivery process (11 percent); and facility (10 percent). Among rejecters, satisfaction was examined across five measures (listed in order of importance): salesperson (20 percent); fairness of price (12 percent); facility (6 percent); inventory (6 percent); and experience negotiating (5 percent). Overall sales satisfaction among both buyers and rejecters averages 664 on a 1,000-point scale in 2012, improving from 648 in 2011.

Lexus ranked highest among luxury brands in satisfaction with the new-vehicle buying experience for a second consecutive year, with an index score of 737. (Rankings are based on the experiences of both buyers and rejecters.) Infiniti (728) and Cadillac (725) followed. Year-over-year sales satisfaction improved the most for Infiniti (+52 index points), moving from ranking eighth in 2011 to rank second in 2012.

MINI ranked highest among mass-market brands for a third consecutive year, with a score of 712, followed by Buick (706) and GMC (683). Honda improved the most among mass-market brands (+30 index points) and moved from ranking 12th in 2011 to eighth in 2012.
www.jdpower.com

••• mobile research

Phones for Facebooking

Social media dominates smartphone Internet time

As consumers increasingly rely on smartphones as a major source of Internet access, social media represents by far the largest share of online time via these devices, according to research from The GfK Group, a Nuremberg, Germany, research company. Social sites and activities account for almost one-third of smartphone online minutes – double the proportion for e-mail, which ranks second at 16 percent.

The analysis also looked at differences in online activities when using PCs (laptops and desktop computers) versus smartphones. Social media represents only 18 percent of time spent on the Internet via PCs – the same percentage as e-mail and only slightly higher than online video (13 percent) and search (11 percent).

Phones now account for 17 percent of total time spent with the Internet across all devices, compared to 12 percent in 2011. Desktop and laptop computers, by contrast, have dropped off considerably, representing 73 percent of Internet time, compared to 83 percent a year ago. Tablets account for 6 percent of online time – double the 2011 figure of 3 percent; and Internet TVs also doubled, from 2 percent of online time in 2011 to 4 percent in 2012.

Trend data show that the purposeful Internet use encouraged by smartphone apps – checking social sites and e-mail – may be affecting how consumers approach online time via PCs, as well. The percent of time devoted to uncategorized "other" Internet activities on PCs has dropped by almost half in just a year, from 37 percent in 2011 to 20 percent in 2012. Meanwhile, time spent accessing online video via PCs has essentially doubled, from a 7 percent share to 13 percent, and time with social media and e-mail also grew.

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Credit card kickbacks go toward necessities

Among credit card holders, over three-quarters have rewards programs associated with their cards, most commonly cash back (47 percent) and general rewards points (44 percent), and the majority of cardholders put these rewards to practical use, according to a poll conducted by New York research company Ipsos Public Affairs on behalf of the American Bankers Association.

Cash back is not only the most common type of rewards program but it is also the most favored, as six in 10 rewards-card holders say that cash-back cards are the most appealing credit card reward program to them personally. Other rewards programs include airline miles (15 percent), gas rewards points (8 percent), hotel points (7 percent), or some other reward program (4 percent). Fewer than one-quarter (23 percent) do not have rewards programs associated with their cards.

A quarter (26 percent) prefer general points that can be redeemed for goods, while 9 percent most prefer airline miles cards. A handful of respondents choose hotel points (2 percent) or some other type of reward (2 percent), while 1 percent said that none of these types of rewards are most appealing.

Those most likely to prefer airline points are those with a higher household income (11 percent vs. 5 percent of those with lower incomes) and those with a college degree (13 percent vs. 6 percent of those without). Those without a college degree tend to prefer general points cards (30 percent vs. 21 percent).

Just over half of rewards-card holders say they most commonly use their rewards to make necessary purchases for themselves or their household (54 percent). Three in 10 use their rewards to purchase gifts for friends and family or for purchases or travel that are outside of their normal purchase behavior (i.e., special offers, upgrades, trips, etc.) (27 percent). Only 18 percent report that they have not used the rewards they have earned.

Among those who participate in a credit card rewards program, 68 percent do not have any suggestions for additional rewards they would like to see their credit card company offer other than what is already provided. Less than one in five offer some suggestion about another type of rewards offering, most commonly cash back (5 percent), some other type of points/rewards (5 percent), gift cards (2 percent) or gas rebates or rewards (2 percent). Just 2 percent would like to see a rewards program related to reduced fees or interest rates. www.ipsos-na.com

••• hispanics

Focus on faith and family

What ipacts the Hispanic-American worldview?

Hispanics are the fastest-growing population segment in the U.S. and have a distinct perspective faith, family and societal issues. A study conducted by Barna Group, a Ventura, Calif., research company, in partnership with American Bible Society, the National Hispanic Christian Leadership Conference and OneHope, investigated how Hispanic-Americans' views will impact the political, social and economic climate in the U.S.

To start, 54 percent of Hispanic-Americans identify themselves first as Hispanic or Latino before American, Catholic or Christian. Still, 69 percent of Hispanic-Americans think public schools should teach the values found in the Bible and 42 percent say the Bible influences their views of political and social issues. However, 43 percent read the Bible less than once a year.

Hispanic-Americans are very concerned about school dropout rates (58 percent), immigration (53 percent), unemployment (57 percent), health care (54 percent) and housing (52 percent). Hispanics believe the No. 1 way they contribute to American society is through their commitment to family. Over three-fourths say the traditional family is the main building block of a healthy community.

When faced with a moral or ethical choice, 22 percent of those surveyed make choices based on principles or standards they believe in say they should do; those standards were most commonly defined by their parents or the Bible. http://hispanics.barna.org

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Product and Service Update

••• ad research

This time with feeling

A new metric for measuring video ad effectiveness

Ace Metrix, a Mountain View, Calif., research company, has introduced the Emotional Sentiment Index, a metric intended to determine the level of emotional engagement consumers have with ads. The index does not judge an ad but rather gives the advertiser an index score to understand how the ad engages with viewers on an emotional level – positive, negative or neutral – relative to every other ad in the database, other ads in the category and other ads from the brand.

Using natural language processing algorithms, Ace Metrix calculates the positive and negative words used in verbatims collected from each ad through Ace Metrix's testing environment. The Emotional Sentiment Index is represented on a scale of 1 to 100 and the score indicates where the ad sits relative to every other ad in the database.
www.acemetrix.com

quirks.com/articles
ID 20130204

••• mobile research

Usability on-the-go

The appTimizer aims to improve mobile UX

London research company Skopos has debuted the appTimizer, a solution that uses a suite of qual and quant research techniques and technologies to uncover insights on areas for mobile user experience improvement. The service aims to "triangulate the truth" regarding app user experiences using in-person, in-situ usability tests; in-app quantitative surveys (via ads/links) on the user experience; and user ratings.

The system is being used to provide insight during development and pre-testing (via usability interviews and quant surveys with potential users but without user ratings) and post-launch (with in-app surveys and user ratings).
www.skopos.info

••• customer experience

Streaming business decisions

Solution for monitoring real-time online visitor behavior

Webtrends, a Portland, Ore., research company, has debuted Webtrends Streams, a digital intelligence solution designed to harness visitor-level data, as it happens, across all digital properties of an enterprise, including Web sites, mobile and social channels. Configurable live streams of real-time online customer activities provide views of a company's online business.

With Webtrends Streams, organizations can stream visitor events as they happen, allowing marketers to use this digital intelligence across their optimization, segmentation and targeting efforts to improve engagement with customers while they visit.

Webtrends Streams is powered by Streams Lab, a real-time big data exploration and visualization tool that aims to allow marketers to segment unlimited events and customer attributes into any number of live streams, depending on the business need. These live streams can be configured, enriched with other data streams and shared with testing, targeting and personalization solutions to drive immediate action and improve the customer experience.
www.webtrends.com/streams

••• customer experience

Acting on big data

Cloud-based predictive intelligence to help marketers take action

Mountain View, Calif., research company AgilOne has launched its flagship solution, dubbed AgilOne. AgilOne is a cloud-based collection of predictive marketing tools based on an intelligent platform and designed to deliver insight into customer data across all channels (e.g., customer data, Web activity, social behavior, in-store purchase, mobile, etc.) and recommend immediate actions to increase revenue.

AgilOne aims to allow high-volume marketers to harness big data and provide marketing analytics to help companies understand customer acquisition, retention and reactivation and predict what their customers are going to do next.

The AgilOne application includes PowerAlerts to tell marketers what is happening in the customer base (such as which segment may be inclined to respond to a specific offer) and what they can do about it immediately; Pathways to give marketers prebuilt dashboards and guided analysis against a specific business problem, such as churn; Metrics to allow analysts to do rapid, advanced ad hoc reporting; 360Profiles to give marketers a complete view of customer contacts, accounts or other

InterVu Webcam Focus Groups are Ideal for Hard to Reach Respondents

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important entities (such as products and key behaviors); and Actions to take immediate action.
www.agilone.com

••• data visualization

DIY dashboards

Enhanced reporting tool to improve Confirmit's VOC platform

Oslo, Norway, research software company Confirmit has introduced Active Dashboards, an enhancement to its reporting technology, in the latest release of its CustomerSat solution. Active Dashboards aim to allow users to visualize feedback results and share voice-of-the-customer (VOC) data across the enterprise for analysis, reporting and action management.

Active Dashboards provide each employee with a personalized, interactive view of customer feedback, tailored to their specific role within the organization. Expressly designed for VOC programs, Active Dashboards deliver customer survey data in real time, displayed through charts, tables and widgets that enable users to visualize and analyze survey results at a glance.

To ensure that the right Active Dashboard reports are delivered to the right employees, Confirmit CustomerSat's QuickPaths hierarchy-building feature automatically populates dashboards with survey data according to a company's organizational hierarchies. When employees change roles, QuickPaths adapts the hierarchies and automatically updates dashboards based on those changes.

Active Dashboards' reporting capabilities include features such as displaying performance across metrics and questions using color-coding and heat maps; trending a statistic over time; comparing scores for metrics and performance over time; setting crosstabs to compare metric performance; displaying verbatim responses; monitoring the health of a survey by tracking response rates in real time; conducting an automatic statistical analysis of KPIs to compare results between groups or teams; PeerCompare to allow users to see their scores for metrics in comparison to their peers; and the ability to share dashboards.
www.confirmit.com/customersat

••• research education

Keeping up

Online research course debuts trends curricula

The University of Georgia, Athens, Ga., in conjunction with the Marketing Research Institute International, St. Louis, has introduced new trends curricula to its Principles of Marketing Research: An Online Certificate Course. The material is intended to incorporate the latest thinking and practical industry knowledge, focusing on new and emerging technologies such as Web 3.0, big data, automatic language processing and others; evolving data collecting methods, such as mobile marketing research, data mining, panel evolution, apps-based research and gamification; and the changing structure of the research industry. The material was written by Blair Peters and is available to all who enroll.
www.principlesofmarketingresearch.org

••• gay and lesbian

Not so narrow

Service to target LGBT in gen-pop media

Gay Ad Network, Fort Lauderdale, Fla., has launched a data-driven audience targeting service designed to allow advertisers to reach gay and lesbian consumers beyond gay media. The service uses demographic, behavioral, purchase intent and social data-targeting algorithms to identify audience targets across an array of media outlets, ranging from niche LGBT Web sites to premium mainstream Web sites and mobile apps. The most relevant ads are delivered to individual consumers based on specific engagement metrics, interests and behaviors.
www.gayadnetwork.com

••• diy research

Simplify sampling

Samplify offers DIY online research sampling

San Francisco research company Peanut Labs has launched Samplify, a software-as-a-service sampling platform designed to provide real-time DIY access to Peanut Labs' online sample. The goal is for users to go through fewer steps to ensure that a representative sample is delivered to their clients.

Samplify aims to allow users to access the sample pool, both feasibility and pricing, test project links and launch and manage surveys. Additional functionalities include project configuration and nested quotas; the option to add pre-screeners; 24-hour access to reporting on project activity (both overall and by quota); real-time access to project status indicators (including attempts, completes, over quota, daily quotas and progress); and basic project management actions (including managing, resuming and duplicating projects).
http://samplify.it

••• survey software

Bolstered Beacon

Reporting software adds tools for improved survey programming

Fresno, Calif., research company Decipher Inc. has added the Alternative Question Toolkit and

Decipher's alternative question library to its Beacon market research platform. The updates are designed to allow users to utilize quick configuration that automatically incorporates built-in checks like error reporting, translation support and device targeting and optimization; add device-agnostic custom interactions and customize a survey's look and feel with HTML5, CSS and Javascript; apply open-source libraries controlling visualization and interactivity; and build their own library of alternative questions or use Decipher's integrated questions.
www.decipherinc.com

••• television research

Tracking TV on Twitter

Nielsen and Twitter partner to measure TV social media chatter

New York researcher The Nielsen Company and Twitter, Palo Alto, Calif., have collaborated to create the Nielsen Twitter TV Rating service for the U.S. market. Under this agreement, Nielsen and Twitter will aim to deliver a syndicated-standard metric around the reach of the TV conversation on Twitter.

The Nielsen Twitter TV Rating is slated for commercial availability at the start of the fall 2013 TV season and will serve as a complement to Nielsen's existing TV ratings, building on NM Incite's SocialGuide audience engagement analytics platform.
www.nielsen.com

••• Briefly

■ Research companies Kinesis Survey Technologies LLC, Austin, Texas, and StartSampling, Carol Stream, Ill., have partnered to deliver in-home product testing services to Kinesis users. The partnership will use StartSampling's project management, product fulfillment and research facilitation for in-home product testing initiatives. Consumer feedback will be supplied via online surveys powered by Kinesis Survey.
www.kinesissurvey.com

■ Stockholm, Sweden, research company Cint has partnered with Delta Marketing Dynamics, a Syracuse, N.Y., research company, and extended its existing collaboration with ImpactRx, a Horsham, Pa., research company, to increase its panel sample of medical professionals. The agreements are designed to allow health care organizations to obtain the opinions of medical professionals through Cint.
www.cint.com

■ Boston research company Crimson Hexagon has integrated San Francisco research company Klout's influence scores within its ForSight platform. The Klout algorithm analyzes more than 12 billion data points each day across key social media networks, as well as several offline influence factors.
www.crimsonhexagon.com

■ Reston, Va., research company comScore Inc. has announced the U.S. beta release of Media Metrix Multi-Platform, a solution designed to offer unduplicated accounting of audience size and demographics that reflects the multiplatform digital media environment, which includes Web sites, apps and video content accessed from multiple devices.
www.comscore.com

■ Shelton, Conn., research company SSI has announced plans to release version 8.2.0 of its SSI Web platform. The update will include a data generator to create practice respondent data to help users test skip patterns and set up crosstabs prior to getting real data; anchored scaling in max-diff; and latent class and logit integrated within max-diff's menus.
www.surveysampling.com

■ New York researcher The Nielsen Company has rolled out its Nielsen Online Brand Effect measurement and optimization solution in the U.K.
www.nielsen.com

■ Portland, Ore., research company Rentrak Corporation has expanded its International Box Office Essentials measurement service to begin collecting daily theater level attendance and ticket sales information in Malaysia and Singapore.
www.rentrak.com

■ London research company YouGov has launched its YouGov Omnibus services in the U.S. Ray Martin will lead the initiative out of the company's New York office.
http://research.yougov.com

■ Waban, Mass., research company Temkin Group has released The State of CX Metrics, 2012, a report that details how large companies are using customer experience metrics and how the effectiveness of these efforts has changed since last year. The report is available for download at www.temkingroup.com.

■ SIS International Research, New York, celebrated its 30-year anniversary in December 2012.
www.sismarketresearch.com

■ Clever Instruments, Barcelona, Spain, has launched a new Web site for its market research division, ARN Healthcare at www.arn-healthcare.com.

A look inside the choice-modeling toolbox

| By Michael Lieberman

snapshot

An overview of five common choice models employed in marketing research.

Consumers do not usually make purchase decisions based on one single condition. More often, consumers examine a range of features or attributes and then make judgments or trade-offs to determine their final purchase choice. Choice modeling is a market research tool that outlines this decision process. Within the context of a product or brand, choice modeling incorporates attributes such as cost, prestige and environmental impact to predict purchase decisions of individuals or market segments.

There are many statistical methods that can be used to perform this analysis. The main challenge for market researchers is determining which one is most appropriate in a given situation. This article will give an overview of the five most common choice models employed in market research, describe when to use them and outline their advantages and disadvantages.

Paired-comparison analysis

Paired-comparison analysis is the most basic type of choice model. Essentially, a respondent sees two choices and then determines which one he prefers. He then sees two more and the exercise repeats.

Paired-comparison is useful when there are small numbers of products or brands to compare – five or fewer. Comparisons contain no outside attribute information, such as prices, which limits the analysis.

Paired-comparison analysis helps the researcher work out the importance of a number of options relative to one another. It also helps the researcher set priorities where there are conflicting demands on resources.

For example, a major medical foundation is choosing between several different projects that are asking for funding. To maximize impact, it only wants to contribute to a few of these and the board of the foundation has been given the following four options.

A: End-of-life closure
B: Health careers futures
C: HIV/AIDS
D: Regional health initiative

With four initiatives, looking at two at a time, the maximum number of comparisons is six. The paired-comparison chart is shown in Table 1. The letter represents the choice of which initiative the board preferred and the number represents the strength of the preference (1 = prefer, 2 = prefer strongly).

Table 1

Service Category Questions	End-of-Life Closure	Health Careers Futures	HIV/AIDS	Regional Health Initiative
End-of-Life Closure		A,2	C,1	A,1
Health Careers Futures			C,2	B,2
HIV/AIDS				C,2
Regional Health Initiative				

Finally, they add up the A, B, C and D values and convert each into a percentage of the total. These calculations yield these percent-

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ages: end-of-life closure – 30 percent; health careers futures – 20 percent; HIV/AIDS – 50 percent; regional health initiative – 0 percent. The board has made its choice. It will support HIV/AIDS and end-of-life closure.

Conjoint analysis

Conjoint analysis is useful in shaping new products, determining maximum levels of product enhancement and predicting market share. It works best when assessing a product that has a maximum of six attributes. In this method, the researcher is given a list of all attributes and all levels of these attributes. From this, he creates a computer-generated design referred to as an orthogonal model.

Respondents are asked to rank various product qualities, followed by a series of product purchase interest questions. Running the data yields utility scores which allow the researcher to accurately simulate the marketplace in great detail.

Below is an example of a conjoint scenario:

On a 1-to-5 point scale, how likely are you to purchase this olive oil with the following features?

- Premium, select-quality olive oil
- Full-bodied olive oil, adding a rich layer of flavor
- Contributes to a healthful cholesterol ratio
- Select, high-quality olive oils from California
- 16 oz., $5.89

Using the same 1-to-5 scale, we would then ask the question using a different combination of attributes. Conjoint analysis allows the researcher to examine the relative importance of price against the other factors in the model. In Figure 1 we see that while price has the largest share of attribute importance, the other factors are also significant.

The next step in the conjoint analysis process is the development of a simulator to model any combination of factors. This will allow the researcher to see purchase intent for scenarios not shown in the survey – and therefore facilitate the design of the optimal product. A respondent might see only nine scenarios but with the conjoint output, we can evaluate 240 different product levels.

A limit to conjoint analysis is that it can only model combinations of levels of attributes that are included in the study. This can be a limitation if price is an attribute; conjoint is unable to model prices that are not shown.

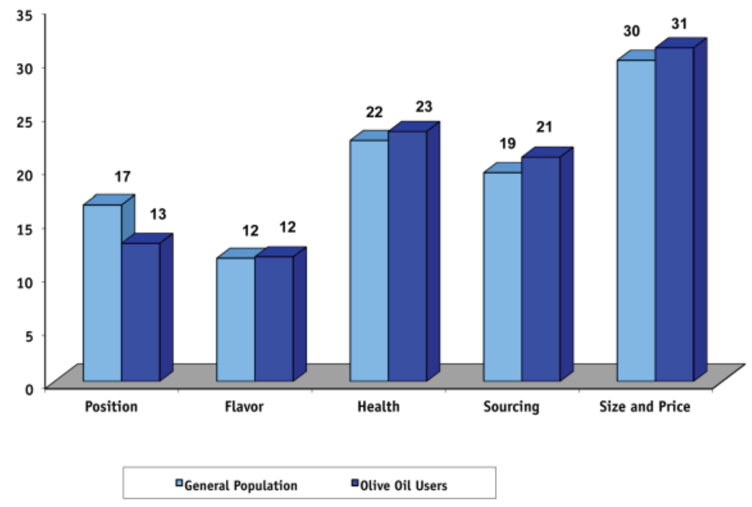


Figure 1: Average Importance of Attributes

Discrete choice modeling (also referred to as choice-based conjoint)

As the name might suggest, this choice technique best measures distinct choices – in other words, best for products or brands that already exist.

Discrete choice analysis consists of a series of questions that ask respondents to choose between three or more hypothetical products or services at different price levels. The model simulates future market states to support product and price-level decisions.

A well-constructed discrete choice model: optimizes price or brand positions within existing market realities; takes into account "non-purchase"; gives customers real-world choice by including competitive brands at different prices; and can target specific competitors with products designed to take share specifically from them.

For example, Bart's Bait Company wants to introduce a new bait into its local market. With discrete choice, it will be able to project its market share among its chief competitors. Bart specifies the competitors and a range of prices. Below are two sample scenarios:

Scenario 1
Please choose *one* of the following:

1. Bart's Skinny Chunk at the price of $2.39
2. Zoom Fat Albert Twin Tail at the price of $2.19
3. E-Bait Big Salty Chunk at the price of $2.39
4. Bracken Bait's Big Critter Craw at the price of $1.89
5. None of the above

Scenario 2
Please choose *one* of the following:

1. Bart's Skinny Chunk at the price of $2.39
2. Zoom Fat Albert Twin Tail at the price of $2.39
3. E-Bait Big Salty Chunk at the price of $1.89
4. Bracken Bait's Big Critter Craw at the price of $2.19
5. None of the above

Please notice that the only changing attribute on these two scenarios is the price. The brands remain constant.

After running the model using logistic regression, we then create a simulator, which allows Bart to plug in prices for its Skinny Chunk as well as for the three other competitors in the market.

The baseline output is shown in Figure 2: if all bait sold at a middle price of $2.19 (median market condi-

Figure 2: Discrete Choice – Bart's Bait – Skinny Chunk Market Entry

Initial Price Findings – All Brands at $2.19

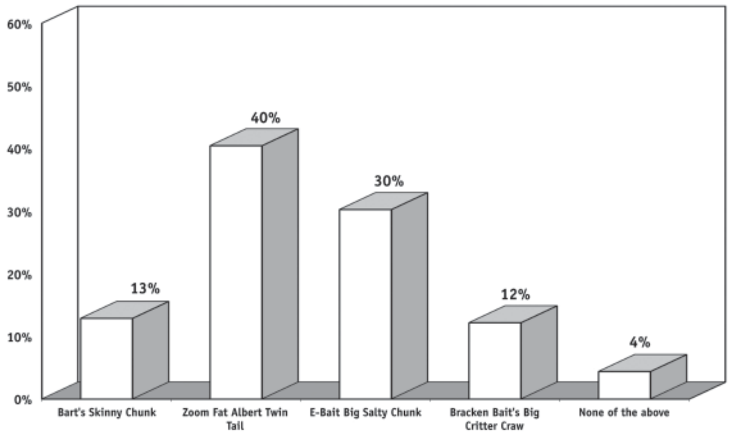
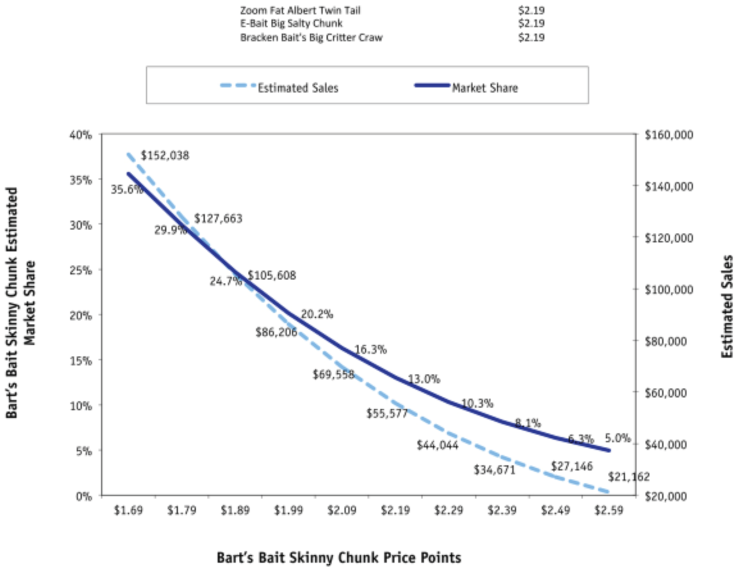


Figure 3: Tested Price Points for Bart's Bait Skinny Chunk



tions), Bart could expect about a 13 percent entry market share.

This model works as a market simulator. Bart can project its Skinny Chunk market share and sales for different price points. Figure 3 shows a graph of Skinny Chunk sales and market share by price-point if competitors are all priced at $2.19.

Clearly, the lower the price Bart charges, the greater the market share it will gain. However, the lower prices may not be realistic price points and the higher ones may give Bart too low a sales figure. Moreover, Bart's competitors might raise or lower prices around the median of $2.19, which would render this analysis obsolete.

One of the great advantages of the discrete choice model is its flexibility. The graph (Figure 3) can be reproduced in literally infinite iterations if market conditions change. For example, if E-Bait priced its bait at $2.29 and Zoom priced its at $1.99, a new chart can easily be created. Or if Bracken's suddenly exits the market, the model can be reset for only three brands.

So Bart's Bait can determine the best price for its product based on changes in the competition.

Large numbers of attributes

Users of the three methods seen so far would probably agree that their most serious problem is dealing with large numbers of attributes. Corporate clients often seek to include every possible scenario, which may lead to long, grueling interviews and reduced incidence – not to mention respondent fatigue and inferior-quality data. There is a definite trade-off between including "the kitchen sink" and performing an actionable choice model.

There are, however, choice models that deal with large numbers of attributes. The final two examples are useful when these come up.

Maximum-difference (max-diff)

Whereas a paired-comparison question asks a respondent to make a binary choice, maximum-difference has the respondent specify "best" and "worst" choices from sets of three or more objects.

Max-diff can test a large number of attributes without requiring respondents to see them all. Moreover, max-diff is flexible – data from a max-diff analysis can be used to create a choice simulator like those of conjoint and discrete choice.

A maximum-difference choice model is easily administered, has multiple levels of analysis and is a very effective tool in establishing the relative priority of such items as: potential message for a new product; features or benefits of a service; which extras to include in a loyalty program; fundamental customer interests and activities; and unmet/future needs.

Maximum-difference eliminates the awkwardness of a large set of customer choices, moves rapidly through the survey and eases respondent fatigue. Moreover, max-diff not only reveals the descriptive results that companies are looking for but can also be applied to predict future customer behavior.

As an example of a max-diff study, let's say that a hotel chain, Malone Gardens, wants to know which benefits members of its loyalty program prefer. Moreover, it would like to know if it can expect a bump in expected visits if a given benefit is included.

Initially Malone Gardens provided a long list benefits it wanted to test. For the sake of simplicity, we tested only 12:

- free hotel nights
- experience getaways
- dream vacations
- premium merchandise
- airline miles
- bonus points
- complimentary health club privileges
- hotel room upgrades
- reward planner services
- spa or golf packages
- partner car rental privileges
- shopping and dining

Each of the 12 benefits can be shown randomly (thus no need to do an orthogonal design). However, they must be shown in groups of four and each benefit must be shown the same number of times. Two example sets are shown below.

Least Important	Reward	Most Important
	Free Hotel Nights	X
X	Experience Getaways	
	Dream Vacations	
	Premium Merchandise	

Least Important	Reward	Most Important
	Bonus Points	
	Complimentary Health Club Privileges	
	Hotel Room Upgrades	X
X	Reward Planner Services	

The construction of max-diff gives it an advantage in that if a client wants to test 30 attributes he or she can. Each respondent would see only 10 or so scenarios, with the flexibility that each respondent may likely see all different sets of benefits.

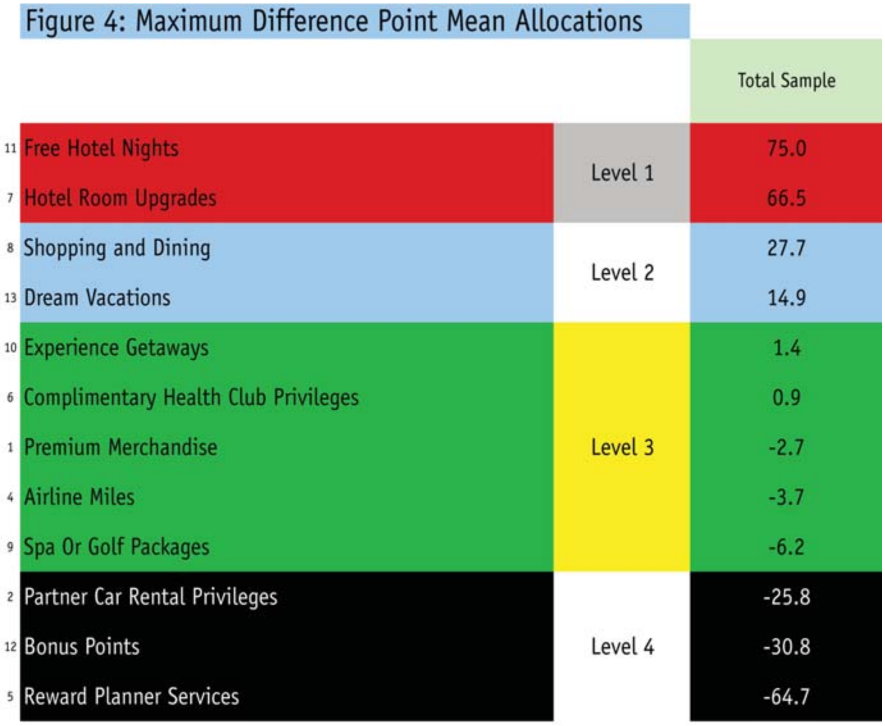
One drawback for max-diff is that attributes are unable to have different levels (i.e., how many bonus points should be given). Secondly, if a client wants to test a large number of attributes, he or she will most likely need a large sample to fulfill data requirements.

First-level max-diff scores may be calculated as such. Among scenarios with each reward present:

- a reward scores +100 if "Most Appealing"
- a reward scores zero if "Not Chosen"
- a reward scores -100 if "Least Appealing"

Figure 4 shows the first-level descriptive scores for the Malone Gardens project. Not surprisingly, guests want free nights.

Figure 4: Maximum Difference Point Mean Allocations



			Total Sample
11	Free Hotel Nights	Level 1	75.0
7	Hotel Room Upgrades		66.5
8	Shopping and Dining	Level 2	27.7
13	Dream Vacations		14.9
10	Experience Getaways	Level 3	1.4
6	Complimentary Health Club Privileges		0.9
1	Premium Merchandise		-2.7
4	Airline Miles		-3.7
9	Spa Or Golf Packages		-6.2
2	Partner Car Rental Privileges	Level 4	-25.8
12	Bonus Points		-30.8
5	Reward Planner Services		-64.7

Level 1: WINNERS - highly desirable items that have high/low scores near 100
Level 2: DESIRABLE - items with a high/low over 10
Level 3: NEUTRAL - items with high/low near 0, indicating indifference
Level 4: NOT DESIRABLE - items with high/low negative scores over 20

Another advantage of max-diff is that it can be formed to compute a choice model, similar to a conjoint. In our example, guests were asked "How likely would you be to join Malone Gardens Priority Club?" The average before running through the max-diff exercise was 5.6. Figure 5 shows that if the hotel adds three of the more popular benefits, the likely-to-join average rises from 5.6 to 7.3. This kind of agility makes max-diff a leading choice model choice for clients who want to test a large number of attributes.

Adaptive conjoint analysis

Like max-diff, adaptive conjoint analysis (ACA) was developed specifically for situations where there are many attributes. For example, given the large number of variables that go into car design, the automobile industry employs ACA. Generally, ACA is recommended for scenarios with more than six attributes when pricing research isn't the goal of the study.

In ACA, the researcher designs a computer-interactive interview. The questions change based on a respondent's last answer. ACA allows the researcher simulate respondent preferences for new or modified products, giving the analysis the ability to test what-if scenarios such as product formation or marketing activities. Respondent utilities are used to estimate strengths of prefer-

Figure 5: Maximum-Difference Difference Simulator

Malone Gardens Hotel

	1=Included in The Items
Loyalty Benefits	
Free Hotel Nights	1
Hotel Room Upgrades	1
Shopping and Dining	0
Dream Vacations	0
Experience Getaways	1
Complimentary Health Club Privileges	0
Premium Merchandise	0
Airline Miles	0
Spa Or Golf Packages	0
Partner Car Rental Privileges	0
Bonus Points	0
Reward Planner Services	0
Likelihood to Join Malone Gardens Priority Club Member	7.3

ence, purchase likelihoods, and, with cumulated respondents data, to provide a simulated market share.

The downside of ACA is that the data collection vendor must have the ACA module. This makes the technique expensive. In addition, employing a large number of attributes and levels often confuses the results. Respondents may have difficulty keeping in mind that all other attributes not involved in the current question.

For a new-car study with 12 attributes, for example, ACA might cut the question down to something like this:

Please rank order the following:
Power windows/locks
Automatic transmission
No antilock brakes
Five-year loan
Six airbags

To be followed by:

Which of these two are more important?
Automatic transmission
OR
Six airbags

ACA interviews generally take a minimum of 45 minutes. In the past decade, the use of ACA is declining. Firms have come out with hybrid methods that are simpler, such as max-diff. Researchers have also shifted to discrete choice, as choices are viewed as more realistic than concept ratings.

Many ways to apply

There are many ways to apply choice modeling to business solutions. (Table 2 summarizes my recommendations. ACA is not included, as I generally do not recommend this methodology.) Each choice methodology can yield extraordinarily accurate, real-life results if applied correctly. That is why it is important to zero-in on the specific problem the client wants to solve. Deliverables must be made clear, for they determine which method we choose.

Whenever we begin a kickoff meeting, I always ask, “At the end of this project, what would you like to be holding?” From there we work backwards to form a game plan to best answer the questions. And then the fun part begins.

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Table 2

Service Category Questions	Choice Model
Small Number Of Existing Attributes	Paired-Comparison
Product Design	Traditional Conjoint
Market Share, Pricing	Discrete Choice Model
Large Number Of Attributes	Maximum-Difference

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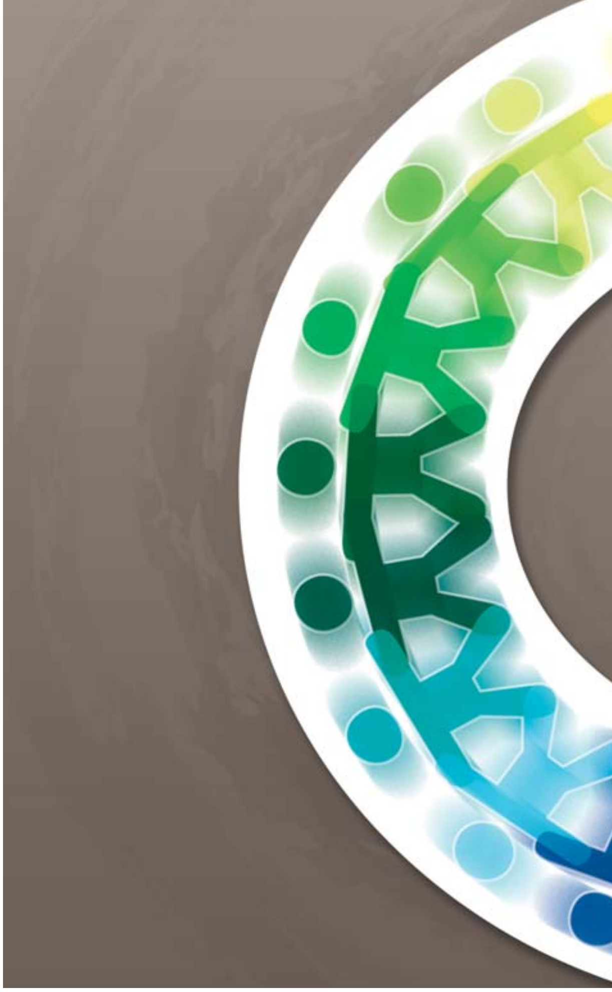
Eating well and doing good

Creative ethnography helps small nutrition-bar start-up find its path

| By Remington Tonar and Jacob Jasperson



snapshot

Nutrition-bar maker 1-For-1 Foods used ethnography and other research methods to understand how its buy-one-give-one model could fit into consumers' lifestyles.

The emergence of socially-responsible business models has changed the way consumers think about businesses but it has also changed the way businesses think about consumers. Buy-one-give-one (B1G1) companies, for example, give one product or an equal value in cash to charitable causes for each one purchased, requiring the businesses to understand two different categories of consumers: those who would normally consume their products and those who may consume them due to the firms' humanitarian model.

This was one of the primary marketing challenges for 1-For-1 Foods, an Indiana-based B1G1 nutrition-bar start-up that retails in the greater Chicagoland area and gives one bar to homeless shelters in the area in which each bar is purchased. 1-For-1 Foods realized that its actual target market extended far beyond health and fitness buffs to socially-conscious consumers who might not normally buy premium nutrition bars.

To better understand these different audiences and learn how they relate and intersect, 1-For-1 Foods turned to us for some pro bono research help. Drawing on our experience conducting research for emerging technology companies, national non-profits and chain restaurant groups, we designed a series of quantitative and qualitative studies, among which was a set of ethnographic studies on nutrition-bar consumers and B1G1 consumers.

Unlike other qualitative forms of research, ethnography studies consumers in their natural environments, providing unscripted and unfiltered results that elucidate people's perceptions and values. This kind of data was critical for 1-For-1 Foods, which needed to thoroughly understand the values and attitudes of its two disparate audiences. Quantitative surveys by themselves do not allow for this level of insight and focus groups and interviews can be less effective than ethnography because of their artificial construction. Indeed, the effectiveness of ethnography at capturing individual and shared values and perceptions is what has made it so

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valuable in the social sciences and, more recently, in marketing.

Many of today's most successful companies have leveraged ethnographic approaches to study consumer behavior and garner a rawer understanding of consumer preferences. Traditional ethnographies often take the form of shop-alongs or in-home studies where ethnographers will observe a consumer interacting with a product at some point in its life cycle. Ethnography, however, is often more time-consuming and expensive than other forms of qualitative research. A typical ethnographic study might require thorough observation of multiple consumers over multiple days, high incentives for participants and high fees for external researchers, which makes these studies prohibitive for many businesses.

More data, more perspectives

As a young company, 1-For-1 Foods didn't have a very formidable marketing budget. So, to help reduce logistical and incentive costs while ensuring credible and useful results, we proposed conducting a set of ethnographic studies on larger groups of people and augmenting the results with online ethnographic research. The advantages to this approach are fourfold. First, observing multiple people simultaneously lets researchers collect more data from more perspectives at one time, saving time and money. Second, because all people are influenced by other people, observing consumers in situations where ideas are being shared can give researchers a more accurate understanding of what those people think and believe. Third, by observing consumers interacting with a product in a group setting, researchers get a sense of what that consumer values about the product and what it means in their social lives as well. Finally, because digital media have become a major locus of social interaction, the online world is an ideal place to conduct ethnographic research in a way that is fast, cheap and effective.

Using this approach, three separate studies were conducted. The first observed a group of avid nutrition-bar consumers on a hiking trip and documented their conversations, habits and interactions with health-food products. The second study observed owners of shoes sold by TOMS – a fast-growing Los Angeles-based company that gives one pair of shoes to underprivileged children for every pair purchased – socializing in public and in private, paying particular attention to the value they placed on their shoes and TOMS' buy one-give one model. The third study used a digital ethnographic approach that observed what different peer groups of nutrition-bar consumers and TOMS shoes consumers were saying about these products via social media. Highly detailed profiles of the most active consumers of each product were constructed using publicly available online information in order to capture the other priorities of each set of consumers.

Because we undertook this project pro bono, we wanted to make sure we were able to give 1-For-1 Foods the tools it needed to conduct future research on its own. To that end, marketing staff from 1-For-1 Foods accompanied us on both immersive ethnographic studies and participated in analyzing the data after the studies were completed.

An ideal setting

For the first ethnographic study, we worked with independent coffee shops in the Chicago area to locate health-bar consumers. Because of the social focus of the study, rather than choose a number of individual participants, we selected a group of friends consisting of 10 male and female health-food consumers from multiple generations that could be observed collectively. After talking with the group about the requirements of the study, we suggested that a hiking trip that the group was planning would be an ideal setting for an ethnographic study.

Using a pre-planned hiking trip as the setting for the study guaranteed that all participants would be immersed in an environment that felt natural and meaningful to them, ensuring that their behavior would be authentic and insightful. The three-day study resulted in extensive documentation of the personalities, social and individual behaviors and value expressions of the hikers. It is worth noting that most of the data was documented in writing due to the lack of electricity on the trip. However, we did use solar chargers to replenish their smartphone batteries so some video could be recorded.

Particular attention was paid to how the hikers interacted with nutrition bars and other health-food products that they had brought with them. A number of powerful insights emerged as a result of these observations. One important finding was that health bars appeared to add value to the hikers' experience both physically and psychologically. On a basic and quite obvious level, health bars provided a portable and convenient form of nutritional sustenance. On a higher level, however, health bars seemed to serve as tangible symbols of a healthy lifestyle that unified the experience of natural food with the natural environment, acting as a visible expression of the hikers' worldview. As one participant said, "[Nutrition bars] stand for who I am and what I believe to be important."

The deeper meaning of health bars was further evidenced by the social value that they added to the group dynamic. The hikers consistently consumed health bars together and often shared and exchanged different bar brands. Most of the hikers demonstrated genuine interest in discovering new brands and hearing peer reviews of popular ones. Additionally, lending further credence to the idea that health bars have a social value proposition, half of the hikers reported that they consume health bars in a similarly social way at their gyms or after working out.

Shadowed the group

Working with several different shoe retailers, we identified a number of TOMS shoes owners to participate in the second ethnographic study. Like the previous study on nutrition-bar consumers, a group of six friends – men and women in their 20s and 30s – who all owned at least one pair of TOMS shoes was chosen for observation. We shadowed the group for a day, accompanying them on a shopping excursion and to dinner at a downtown Chicago restaurant.

Although all of the group members were devoted TOMS shoes wearers, only half of the participants wore their TOMS on the day of the study. Beyond being a more accurate reflection of reality, the diversity of shoe brands yielded a couple of insightful observations. For example, there was a difference in how the participants wearing TOMS treated their shoes compared to those who weren't. Contrary to what one might expect, the TOMS shoes wearers actually treated their shoes with less regard than those wearing other shoe brands. A number of observations, such as the reactions of participants when they scuffed their shoes, suggested that the slightly worn look of TOMS shoes is not only acceptable but valued.

These observations were validated later in the day when two of the participants saw TOMS shoes for sale in a store, causing one of them to remark on the waning condition of his own TOMS. His companion responded by saying, only half-jokingly, "Whatever, it gives them character." Outside of this exchange, the participants did not talk directly about their TOMS shoes. However, they did have several very elucidating conversations about their social and political views. Particularly salient topics of discussion included health care, corporate corruption, global warming, iPhone rumors and new movies.

These touchpoints gave us useful information about the values of a core audience and also served as a reference for participant responses during one-on-one exit interviews that were conducted after the observation period. During these interviews, participants were asked what types of ideas they associate with TOMS and with socially-responsible business models in general. A significant portion of their responses to these questions corresponded with the conversation topics from earlier in the day. For example, some ideas that the participants associated with TOMS included the health and wellbeing of others; the value of ethical corporations; authenticity and trendiness. Additionally, almost all of the participants associated the idea of socially-responsible business with environmental friendliness.

The insights gathered from these live ethnographic studies were then used to inform an online ethnography that analyzed conversations about nutrition bars and B1G1 products on social media networks and profiled a number of consumers who were ardent evangelists of these products. The study of online conversations validated a number of hypotheses that emerged from the live ethnographies and using publicly available information to profile key audience members was a quick, affordable and comprehensive way to get a detailed view of consumers' values and lifestyle.

Impediment to success

For many organizations looking to use ethnography as a research tool, the major impediment to success is not actually conducting the study but interpreting the findings. In the case of 1-For-1 Foods, this task was particularly challenging because two disparate audiences were studied. After revisiting the field notes and media from the ethnographies, however, we were able to draw out dozens of actionable insights that had implications for audience identification, messaging and packaging.

Sticking with the examples cited above, we learned that health bars are not always consumed in isolation and that many times they are paired with other healthy activities such as hiking or working out. Health bars can sometimes even become a topic of conversation, the facilitators of social interaction. The fact that they can facilitate social experiences suggests that they can be symbolic, not merely symptomatic, of a healthy lifestyle.

Health bars are more than a source of nutrition. To some, they're a symbol of a lifestyle, a culture and a particular set of values that are shared among health-conscious consumers. In order to tap into those sentiments, marketing and advertising cannot just focus on the nutritional value of the product but should also feature healthy activities and healthy people in ways that glorify and reinforce the values of that particular consumer culture.

From TOMS shoes consumers, we learned that their personal sociopolitical beliefs are very much linked to their loyalty to TOMS. The B1G1 model is at the heart of why they value TOMS and a socially-conscious focus is important to them when they select both products and peers. This culture of socially-conscious consumers prizes integrity and authenticity in their politics and their purchases. They place a higher value on things that are raw, real and worn, that are not pretentious and nonconformist. Thus, messages directed at this audience should be honest and simple and packaging should look natural and organic.

Ensuring that the entire product experience resonates with socially-conscious consumers is pivotal to getting them to remain loyal to B1G1 brands. It is not enough to have a socially-conscious business model. If the brand experience doesn't meet their expectations and conform to their values, then even the best B1G1 brand will be seen as a poseur and a pretender. Simply put, the ethos of socially-conscious brands needs to correspond to the ethos of socially-conscious consumers.

At the intersection

The 1-For-1 Foods consumer sits at the intersection of two consumer cultures, espousing the values of both health-conscious consumers and socially-conscious consumers. Of all the live ethnography participants from both groups, over half consumed both nutrition bars and owned TOMS shoes, demonstrating that there is tangible overlap between these two core constituencies. Beyond the overlapping of consumer product preferences, there is also a salient overlapping of values. Both segments demonstrate deep consideration for human health, whether their own or that of others, and an underlying concern for the environment. These values of vitality and sustainability inform the perceptions and behaviors of these groups, transforming what they believe and what they buy. Although this statement is mildly truistic, arriving at this conclusion through ethnography gives researchers a comprehensive and unadulterated look at how these values instantiate themselves, allowing researchers to go beyond simply identifying consumer values to understanding what those values mean. Evolving this understanding by monitoring and profiling consumers via social media shows how these values are shared in a less formal environment. This deeper grasp of consumers' values can help marketers reach the right people in the right way with the right message.

The insights that emerged as a result of this process of immersive group ethnography and online ethnographic profiling allowed 1-For-1 Foods to better understand its audience and helped to inform a new approach to marketing and packaging. Conducting ethnography in this manner was truer to how it's traditionally used in anthropology and showed 1-For-1 Foods how it could save money and time down the line by gathering more data in one study and augmenting those findings with free online data.

It should be noted that, in addition to these ethnographic studies, a number of other research tools were used, including quantitative surveys and focus groups. When combined with other tools and properly executed and interpreted, ethnography has the potential to add tremendous value to a research project, and doesn't have to be overly expensive or time-consuming. If the success of the 1-For-1 Foods ethnography project demonstrates anything, it's that even the most complex of qualitative research methods can be leveraged effectively by even the smallest of organizations. Ⓠ

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Let us do our thing

Anthropologists in MR are more than data-gatherers

| By Cathleen Waters

snapshot

The author makes a case for why anthropologists should be included in the early stages of an ethnographic research project rather than merely being asked to observe and report on consumers.

Last June, I attended my first MRA event and I was delighted to observe my colleagues in their own environment, to meet other research professionals from all over the world and to catch up on what's going on in the industry.

I had been looking forward to it for a while but I was also a little scared. I'll tell you why.

On the first day, in the morning, we were awed by innovative social media analytics and in the afternoon we considered Survey Monkey CEO Dave Goldberg's plea to be our friend. We also learned more about what sort of information new mobile research technology could lend us.

Personally, I had a lot riding on day two. I was on the edge of my seat during a talk on the evolution of qualitative research and let out a sigh of relief when a seasoned head of research from a major television network said that traditional qualitative methodologies weren't going anywhere

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anytime soon. She recounted how, in researching the comeback of the American television favorite *Dallas*, the show's writers collected fodder from ethnographies of current Texas oil families and garnered incredible insight into what their world is like – things that those at the network "could have never invented."

My heart soared because throughout the MRA conference, I was keeping a secret.

Despite my embrace of tools like Survey Monkey and my belief that taking a look around Facebook and Twitter can provide great inspiration for a serious exploratory study, I was closely guarding the belief that traditional ethnography remains the deepest, most intimate, most vibrant practice of qualitative research that we know of.

And while the conference was abuzz with talk of methodologies old versus new, while we were all there to learn about what could be new and exciting for our clients, what was strikingly absent at a conference dedicated to the business of studying people was talk about anthropology.

For me, anthropology is a lot like French cooking: It's delicious and sexy and always will be. It can speak for itself – and not because of constant enhancements. Rather, because it's a discipline comprised of practices improved upon over time by trial and error, within a set of high standards and with strong respect for the traditions of our academic forefathers and mothers. All of this is set against the backdrop of an integrated study of culture, geography, religion, language and linguistics and psychology.

This is why I was so delighted to hear the head of research of a major TV network say that traditional qualitative methodologies, such as ethnography, were still viable. And so, just to make sure, having just been validated by the network's development work on *Dallas*, I rose and asked a question. I acknowledged the speaker's holding of ethnography in high regard, but asked whether their ethnography was conducted by anthropologists. I was met with a vague affirmative response that seemed to indicate that no, it wasn't. My heart sank.

Very confusing

You see, the words anthropologist and ethnography, in market research, have become equated with someone who employs observational techniques in proximity, such as shop-alongs, intercepts, focus groups and in-home visits. Some people may even consider telephone interviewing a form of ethnography.

But ethnography is not just a method of data collection: The term also implies an analysis that is concurrent, evolving and in real time. Thus it's very confusing for an anthropologist to get a call from a client requiring "ethnography," after which he sends you into the field with a questionnaire and wonders why your anthropological powers have not produced marvelous never-before-seen insights.

Rather than solely a data-gatherer, the anthropologist is, and should be, a sort of project lead, recruiter, moderator and analyst. We begin our research by delimiting the epistemological questions (determining information needs and limitations and then key questions with the client), selecting our informants (recruitment), then conducting in-depth interviews (moderating). We synthesize our insights by means of ethnographic analysis throughout the process and then we make our ethnography known to the world (presenting findings). Anthropologists almost always conduct their research in the native language of their informants and so you'll find that many anthropologists are multilingual. We consider an understanding of the native language to be a *sine qua non* to understanding our informants.

Did you know that there are valuable insights to be learned from the recruitment process? Why do we ask how many televisions and rooms a home has in Mexico, instead of household income? Why does the incentive feel, even when handsome, like it's not really an incentive in Brazil? Why might it be so hard to recruit people suffering from HIV in China? Why can't you get anyone (including your client) to answer the phone in Italy in August? The answers lie in deep

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cultural information and should shape your research, not be an obstacle to it.

Interwoven tools

So, what is ethnographic analysis? Apart from its horizontal scope – if I may use that phrase, since it spans the entire timeline of your project – ethnographic analysis also comes from the breadth of interwoven tools that the anthropologist uses to consider the world of his informants. What sets our work apart is that the first lens through which the anthropologist looks is his informant's eyes. What does he consider his place to be within the cosmological world? Does he believe there is a god? Does he think of himself first in terms of an individual and secondarily as a collective being such as friend, son, Californian, Northerner, Southerner, Muslim, homosexual? What language or dialect does he speak at home and in his social and professional interactions? What sort of subjects does he consider taboo?

Thus, the anthropologist's viewpoint is singular at times – when trying to gauge each particular informant's outlook on his world with a portfolio of tools that includes religion, history, geography, language and gender, to name a few – and then plural when determining that person's particular inclinations and the relationship to others who similarly associate.

Why does this seem problematic? One of the reasons it's so difficult to understand anthropology in the market research field and in the U.S. is because of an emphasis on psychology. Psychology is certainly a fascinating field and it plays a very important role in social science and in market research. But its development as a discipline rests strongly upon its focus on the individual.

How exactly does this affect market research? In market research, especially in consumer goods, we use the psychographic as a starting point when drawing up an image of our consumer or patient and therefore the means by which we recruit. So, the entire study is already set up to examine, analyze, create findings and later segment based on psychology. (There are certainly differences in segmentation based on biology and payer systems, for example, that are interesting to look at in health care. I find the most clear-cut use of psychographics to be in consumer goods.) What psychology does a great job of is capturing important visceral emotions valuable to us, like "I chew gum when I'm worried and it makes me feel confident," or "I buy dubious knockoff erectile dysfunction drugs on the Internet because I'm too embarrassed to talk about ED with my doctor." (These are paraphrased from two studies I've worked on.)

But what it doesn't take into account is the language, dialect or register of the conversation or the larger cultural beliefs involved. For example, conventional market researchers most often try to conduct the same qualitative and quantitative studies across all of the countries in their global studies but the person who writes the questionnaires and who does the analysis is, in the majority of my experience, monolingual and U.S.-focused.

Further, the research is disjointed

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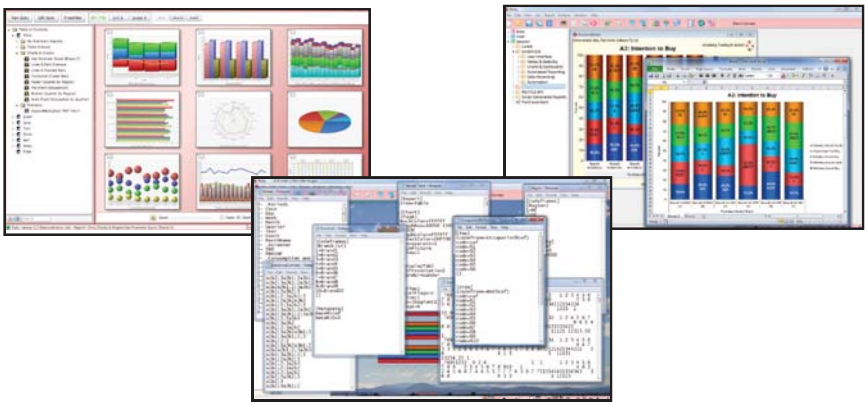

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because each step is conducted by a series of different people along the way: The executive consults with the client, the large recruiting house may write and translate the screener, someone along the way writes the questionnaire and another person may translate it, probably using different language than the person who translated the screener. Then an unknowing moderator asks a series of questions with no real stake in the game, no larger idea of what happened before or what are really the burning questions the client is asking and then she sends an Excel data dump or a bunch or transcripts to someone for analysis. This process, to me, is like keeping a window open during the winter and watching all of the heat – and your money – fly away!

Keeps me up at night

This is the way we do market research today and to be honest with you, it keeps me up at night. Two years ago, a vice-president from a pretty well-known market research house in New York City called me up. She was planning a project with a long-time client and wanted to bring an anthropologist into the mix in order to show the client that the company was keeping it real with their brand. She flew me to Dallas to conduct in-store ethnography with plus-sized women from the working poor who shopped for cute clothes at low-priced retail clothing chains.

"Could I take a look at past work you've done with the client?" "Could I take a look at the RFP?" "Who wrote this questionnaire?" were some of the questions I asked my new client. She denied the first two requests for information because of confidentiality and just plain dismissed the third one. When I presented the meat of my interviews and offered possible trains of thought as a result, she considered them as being out-of-scope with what the client was going for. Of course, my observations and analysis could not have been in line with the client's thinking if I had no access to the client. It's very hard to come up with an aha moment in isolation.

So can you see why anthropologists see a holistic approach to research as important? Yes, we are all, of course, academics, which is sometimes a dirty word, I know. It often means that there is a strong ability (and probably desire) to work alone but not because of a grouchy temperament. Whether it's nature or nurture is a different debate but anthropologists are perhaps drawn to the field because of the desire to solve their own specific burning questions about people, culture and language using their strong talents for planning, problem-solving and analysis.

It's not that we like to work unattended for the majority of the project or that we can't work well with others; it's because of our vision of the larger scope of your project that we work best near the beginning or at the top, however you prefer to view it. We'd rather not be considered just one of the researchers hired to go out and collect data after the entire study has been planned, as it were.

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My earlier mention of the television executive and her appreciation for the cultural insights garnered by the focus groups of the Texas oil families is a wonderful example of how the spirit of ethnography can thrive in contemporary market research. Because in this case, the writers of *Dallas* were specifically interested in the culture of the Texas oil families, its evolution, and, I assume, as writers they were poised to catch every nuance in that particular dialect of American English. This is where we see how language is important not just in global studies but in domestic market research studies as well.

New ways of thinking

I think I speak for a lot of my colleagues when I say that we get pressure from our clients to provide new, cutting-edge methodologies. I believe, not surprisingly, that offering a credentialed anthropologist on your roster of employees or consultants will add a lot to your brand if you are a market research provider and also if you're in-house as the department head. Because an anthropologist will surprise you with new ways of thinking about your research and therefore new ways of doing it. I don't mean with mobile devices and Internet programs. I mean simple things like asking different questions to different people. Not even using a questionnaire. I go back to my example about erectile dysfunction. It's funny, you can do market research on ED in the U.K. via telephone and a Brit will tell you very honestly, from the isolation of his den and in a whispered voice, all about his ED and how he gets his meds and how he doesn't want his wife to know. But did you know that no man in Italy suffers from ED (insert laugh)? Or that perhaps certain men would have alternative uses of ED drugs when it comes to their wives versus their mistresses? In the U.K. and the U.S. you can buy cheap ED drugs online that come to your house in an unmarked box. In some Middle Eastern countries, the knockoffs are suited up in brazen little boxes bearing the image of a tiger, because it's common for a man to gift prowess to another. One of the largest pharmaceutical companies in the world sent me into the field to study erectile dysfunction across five countries and had me use the same formulaic questionnaire for each. I wished they had called me sooner because the information I obtained ended up being as lifeless and sterile as the category.

Insight is lost

We anthropologists who have been trained to conduct traditional ethnography are sad to see so many occasions on which vibrant, beautiful human insight is lost by using different companies, people and parts for each of the above processes. Another casualty? Your valuable research dollars.

Picture a cup: We fill it with rice but there's a little hole in the bottom. The cup is our ethnography; the rice is the people, their outlook, their words. If we take the key questions and pass it to another person to write the screener, in that passing, we lose a couple of grains of rice. If we then recruit and receive nothing but a list of names and phone numbers, passing the cup now to the moderator, we've lost a lot of rice by the time it gets to her. We have just spent thousands of dollars to stare at a list of names and e-mail addresses on a spreadsheet and only then do we begin the hard work of trying to make them come to life. If the anthropologist had had a hand in determining key questions with the client and screening and recruiting her informants, the ethnographic processes would have begun in those earlier stages. Multilingual anthropologists have stunning initial insights into your respondents, just by knowing their names and the region and country in which they live (I swear, it's true).

So give one of us a call next time you want to wow your client with something "new and exciting." Just make sure that you're willing to do things a bit different and we'll make sure that they are.

Cathleen Waters is an anthropologist with New World Medium, a New York global language services firm specializing in marketing research. She can be reached at 646-934-1912 or at cathleen@newworldmedium.com.

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Getting down to the core

How to conduct values research in a qualitative setting

| By Rebecca Day and Reyn Kinzey

snapshot

The authors explore the use of ethnography to understand consumer values, using a research project on TV news as an example of how values can affect product and service choices.

"What matters most to you?" That's really the question behind all market research. But if you ask it that way, the question is hard for a respondent to answer – it's too broad, there's no context.

If you want to make it clear that you really do mean the question in its broadest context, you can ask: "What matters most to you in your life?"

Given time, respondents can and will answer that question but the question certainly opens up an existential rabbit hole of biblical proportions. It's not the kind of question you ask a stranger sitting next you on an airplane, unless you're a philosopher, a religious fanatic or an out-of-work psychiatrist.

But if you frame the question more narrowly, as we often do in market research and ask, for example, "What matters most to you when you watch the news on television?" you're likely to get narrow answers: "Accuracy of the information." "Reliability."

Those answers are honest enough, true in their own way, but not particularly helpful, because we know that people do not, in fact, choose television news stations based on accuracy of information and reliability.

Combine the two

So, if "What matters most to you in life?" is too broad and "What matters most to you in choosing a news station?" is too narrow, are there ways to combine the two that will lead to better market research?

We think so, and we've been fortunate enough to find clients who think so, too. In this article, we'd like to briefly explain values research and provide some key definitions. Then we'll explain why it's important. Finally, we'll provide a case history to demonstrate how values research can be conducted.

Roughly defined, "values research" tries to determine the relationship between what consumers value most in life and how they go about more mundane decisions such

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First, though, let's clarify what we mean by values in values research. Values are the guiding principles by which we run our lives. They may be closely connected – or not – to our religious convictions and political opinions but they are not at all the same thing. We bring this up because clients are often concerned that an exploration of values with consumers is going to turn into participants' harangues about current politics, particularly in this time of political polarization.

Actually, they hardly ever do: average people get it when you ask about their values. Now, by the time we finish interviews with participants, we generally have a pretty good idea of what their religious convictions and political opinions are but we can also generally understand what kinds of personal values are governing their lives.

One final point of definition: values are often stated as universal (such as "justice") but if they are truly values, they are held very personally. We may hold a belief to be universally true but a real value is what drives us personally: It is what is most valuable to me.

For an example out of history, consider the life and death of Thomas More, made famous by the play and movie *A Man for All Seasons*. Most people who know More's story might comment that More died a martyr to his Catholic faith because he would not accept Henry VIII's divorce from Katherine of Aragon and Henry's claim to be the supreme religious authority in England (if that's how you would describe it, you're in good company: that's pretty much the way the Vatican explains it).

However, if you look at More's story from the perspective of values research, you might explain things slightly differently. More certainly had strong religious convictions and strong political opinions but something else seems to have been driving his actions. He was not executed for actively opposing the King's divorce and remarriage. He himself wished to remain silent about those matters (and he did, indeed, remain silent about "the king's great matter" until after he was convicted and condemned to death). He was executed for refusing to take the Oath of Supremacy, an oath acknowledging the king's religious authority in all matters.

Of course, his refusal to take the oath may have been motivated by his religious faith and by his political beliefs but the point to keep in mind for values research is what he did: he refused to swear an oath.

Many English Catholics with the same religious convictions and political opinions did take the oath, assuming that God would realize that a vow taken on pain of death is coerced and so not a sin. More's own daughter swore the oath, even though she was as devout as her father and quite possibly the closest person on earth to him.

The personal value that determined More's life was a determination that he would rather die than swear to something that he did not in fact believe. The usual word for that value is integrity.

We are our values

At its best, a value is something that we cannot violate because violating it would make us other than who we are: We are our values. When they are working properly, values don't just help us make decisions about how to act, they determine what we will do before we even consider making a decision.

Think about it: Would you steal a million dollars if you knew you could get away with it? If you even stopped to think about it, honesty is not an operative value in your life.

Admittedly, most of us probably are not as fortunate as More in having such a perfectly integrated sense of religious faith, political convictions and values to shape our lives. He was, as Maslow might say, a fully self-actualized human being.

For most of us, our values, religious convictions and political opinions, along with our other wants, desires and passing fancies, are a hodgepodge that we reconsider and tinker with every day. Maslow did not believe that very many of us ever achieve full self-actualization.

And yet all of us have personal values that run much deeper and determine our behavior far more than our opinions and current fancies. Those values run deep partially because they are formed very early. Both the Freudians and the Jesuits would argue that everything important happens to us before puberty: The Jesuits have a saying, "Give us a boy until he is eight and he is ours forever." Clearly, our parents have a strong influence in determining our values and values are often reinforced through religious "instruction" but our early environment shapes us as well. Most of us value highly fairness and fair play and we probably learned those values on the elementary school playground even before we learned the multiplication tables.

Older theories of personality tended to think that personalities are formed early and remain fairly consistent throughout life. More modern – and post-modern – theories see personality as more fluid and even question the concept of a fairly coherent personality throughout life.

Still, it does appear that deep values remain fairly consistent over time. And if marketers can understand people's values, they can better understand what truly motivates people in terms of the products and services they offer. To be simplistic, if you were trying to sell life insurance to St. Thomas More, you might not want to discuss religious matters but you would certainly want to convince him that he could trust you at your word.

In the values research projects we've conducted, many people do say that faith is a primary value. We heard this from people who had been raised Christian, Jewish and Muslim. Many of them still practice their faith. Many do not but their values are still shaped by their religious traditions.

However, the important point is that knowing people have made faith a primary value is not as important as knowing how faith affects their decisions. As the example of Thomas More demonstrates, the values operating within a particular faith system can be very different. Each of the three faith systems that are the most prevalent in United States – Christian, Jewish and Muslim – have within them at least two complementary but different traditions: the more contemplative approach of prayer, ritual and even mysticism and the more active social justice or compassion traditions (for example, in Islam, the mysticism of the Sufis, which preserves Sharia but holds that even the law is meaningless unless it is accomplished with purity of spirit; in Christianity, the tension between "faith" and "works;" in Jewish thought, prayer and ritual but also the social justice of the prophets).

Now, think for a moment about the different qualities people of each path of any of the three traditions would look for in a news anchor. People who tend toward the more spiritual path might look more for accuracy and reliability, while people from the social justice or compassion side might want to know more about how a news event is affecting other people. The particular faith tradition may be less important than the personal values that the tradition has created within the individual.

That's where values research can take you.

How it can be done

Enough on theory. Let us provide a general outline of the project we did for a national news provider to show how values research can be done. We conducted 28 ethnographic interviews across the country, four interviews in each of seven cities. In each city, two interviews were conducted with couples and two were conducted with individuals. Participants represented a wide range of age, ethnic and religious backgrounds, income levels, political affiliation and family composition.

We'd like to stress that these ethnographic interviews were conducted in people's homes and they lasted three hours each. We have done similar research in focus groups in standard facilities but we think it is much better to conduct individual interviews or interviews with couples

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and in people's homes. We are asking people to talk about what is personally most important to them in life and people are much more open to that conversation in the privacy of their own homes, which are perceived to be safe places.

We also have the luxury of being able to use one male interviewer and one female interviewer at the same time. That works well with couples, although we also tell couples that they certainly do not need to agree with each other and that we are not there to play marriage counselors – unless they want us to.

Finally, you simply need a lot of time to get to people's values and transition to questions about how their values affect decisions about their daily routines.

One of our clients was concerned that people might not open up to us but of course, people do. We had people admitting on tape to felonies that they were currently committing; to felonies that their children had committed; to felonies that their parents had committed. But talking about actions is the easy part. It's harder and takes longer for people to talk about why they left the church (or felt that the church had left them); how they came to fear that their daughters would become trapped in the same trap of near-poverty if they did not come to value education; or how their value of compassion for all people is in tension with their current belief that some people out there are "gaming the system."

Establish a context

Even given enough time and the comforts of home, it's important to first establish a context. We usually ask participants to complete a homework exercise before the interview by making a collage illustrating what is most important to them in their lives.

The homework exercise establishes a context for a discussion of values. We ask participants to spend about 30 minutes to an hour on the assignment but most apparently spend a lot more and they include not only pictures from magazines but photographs of family members and artwork their children have done.

The collages also offer a first safe round of questions (after the usual introductions). We simply ask participants to walk us through the collage and explain what the illustrations mean.

And we encourage them to talk, to tell stories. That's why it's time-consuming. Again, many key values are formed very early, so we encourage people to talk about their childhood and we ask questions such as, "When did you first realize that family was the most important thing in your life?" Other standard techniques for eliciting memory work well: "Do you remember where you were when… "

Projectives and storytelling are good ways to begin but to get to how values really shape everyday decisions often requires a kind of laddering that can be intrusive if not handled carefully. Most moderators are trained well enough not to ask people directly "Why is having a family important to you?" but the researcher really does need to find out precisely that.

Rely on observation

And sometimes we have to rely on observation as well as self-reporting. For example, many affluent, well-educated participants are much less likely than working-class participants to mention the value of education but that is often very much because it is so important as a personal value, so ingrained, that the person doesn't even think to mention it. But if that person is wearing a sweatshirt from his daughter's university and many of the family pictures in his collage are from graduations, the researchers might want to raise the issue.

Being in someone's home and seeing all of their "stuff" is a huge advantage of ethnographic research. You can often get a strong sense of a person's values just by looking around.

And again, getting people to identify their values is the simple part. It's no surprise that people say that family, faith and being responsible (doing the right thing) are primary values. Education or "discovery" is very important to many people and we are seeing more and more people identifying health as a primary value (our guess is that a lot of people have always assumed good health but now people are talking more directly about it).

Very few people talk about success or their jobs, although being financially secure is often a sub-value of either “family” or “being responsible” (and virtually every family we talked to had been affected by the recession: the affluent have lost vacation homes and put off retirement, while the single mothers are taking on third part-time jobs).

But again, the more important research goal is to understand how these values operate in their lives. For example, while both men and women said that family is an important value, they tended to talk about their children in different ways. Among couples, women seemed to talk more about the sheer joy of being with their children while men talked about children as a source of pride and even their “legacy.” Interestingly, single mothers talked about their children from both perspectives. The differences suggest different personal values are operating under the larger, more abstract value of family.

Generally, the discussion of values, how they were formed and how they affect daily lives run the first hour and a half. The second half of the interview is devoted to how those values affect how they feel about the particular topic – in this case, how they get the news. For example, we might test some benefit statements about the value of news in general and by the last half hour or so, we are asking very direct questions about how they access the news and how they feel about certain networks.

We think that it is very important to finally ask the same direct questions that you might ask in a standard focus group about attitudes toward news channels but by now, the interview has established a particular “values” context. Still, the interviewer has to be the one to weave previous comments a participant has made into what he or she is currently saying, such as, “That’s interesting because now you’re saying something about the news. Earlier you said something about your values. Do you see any connection between the two?”

Often, they may not but as with all qualitative projects, at the end of the day, when we review the transcripts and look back over the collages, we see patterns emerge. People who are most driven by a value in the same way often want the same kind of news programming.

We can’t tell you the findings of the project – that would be giving away something proprietary – but we can point to an historical example of how values and the way we hold them can affect how we want to get the news (an example that many of our older participants did in fact raise).

Think about the 1960s and 1970s, when, at the same time, traditional “family values” were very important to the American people and yet those values were coming under attack. The news anchor for that time was “Uncle” Walter Cronkite. Douglas Brinkley in his new biography on Cronkite argues that Cronkite was successful because he connected with people and reassured us that, despite it all, we would be all right, just as a good parent would. But of course, that was a different time and a different place. We hold slightly different values – or perhaps we hold the same values but differently – and we look for this generation’s anchor.

We can also tell you that we went away from the project feeling very good about the American people in general. We may not always live up to our values – our values are who we are when we are at our best, and, as noted before, Maslow didn’t think we all get there. But our general values are good, solid ones: We value doing what’s right and caring for others. If business and organizations produced goods and services that appealed to our true values, perhaps we would live up to them more fully.

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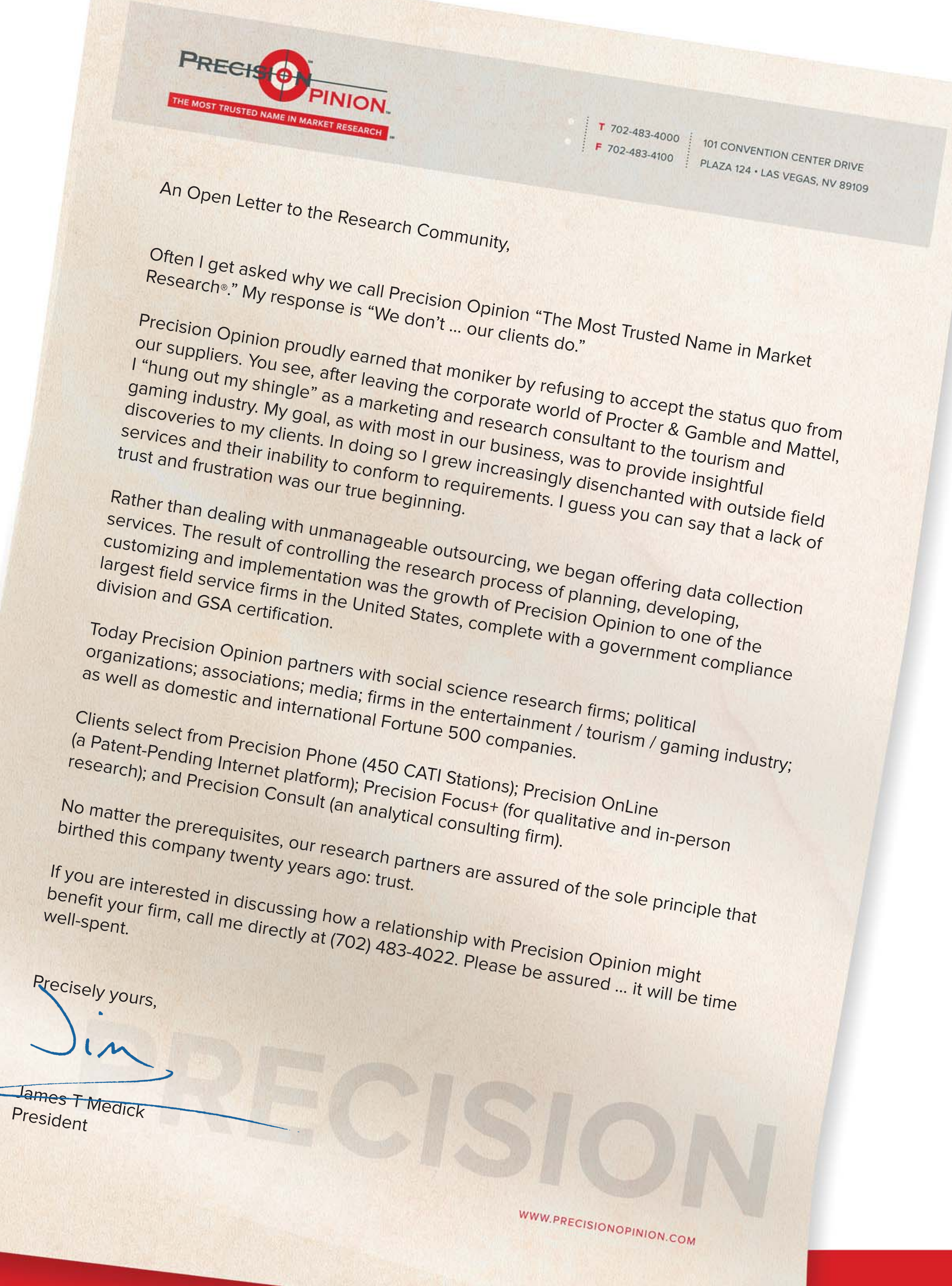

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Mr. Mom

Dads are a rising consumer force ignored by most brands

| By Jon McNeill

snapshot

No longer relegated to cars and electronics, a Yahoo! study shows that today's dads are sharing the family CEO role with moms.

Marketers love moms. Seen as the CEO of their households, moms are the target of millions of ad campaigns each year. Unsurprisingly, the majority of market research aims to decode moms' shopping behavior, attempting to find out where, how, why and what moms buy.

But a new market research project has unveiled a rising consumer force: Mr. Mom. Dads today are deeply involved in their children's lives and are making far more of the household purchase decisions jointly with their spouses. Mom used to purchase most of the baby and child products, household goods, clothing and more. Now, dad is increasingly getting involved in all of these purchase decisions and is adept at using mobile, social and online technologies to research and purchase products. As dads embrace their new family roles, marketers can no longer afford to market only to moms.

The changing roles of men

Yahoo! recently partnered with my company, Hunter Qualitative Research, and db5, a Los Angeles quantitative consultancy, to conduct a comprehensive study of dads today. Yahoo! wanted to explore the changing roles of men in today's families so they could in turn help their advertisers truly understand the male demographic. Yahoo! hoped to paint a clear picture of the modern dad and then use this information to understand which brands dads prefer, how they shop and how they'll impact the retail economy going forward.

The study, Digital Dads: I'm Not a Sub-Segment, used non-traditional research methods to take a snapshot of dads' roles in daily family activities such as household chores, childcare and shopping. To get at this level of detail, we needed to capture dads' thoughts in the moment – whether they were at a store, at home or online. To accomplish this, we designed a mixed-methodological study designed to extract responses from eight dads, their families and the dads' network of friends. Participants were located in two cities: Chicago and Portland, Ore.

To capture the dads' in-the-moment thoughts, we partnered with Revelation, a Portland,

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Ore., provider of online and mobile qualitative research tools designed to gather insights in real-time. Throughout the project, participants were encouraged to record their thoughts through photos and notes, uploading them directly into the research platform via computer or mobile device. For example, participants took their phones shopping and then recorded their thoughts about specific brands using the Revelation mobile platform. The research project also included online diaries kept by each dad; in-home contextual interviews with each dad and his family; and ethnographic interviews with the dads and their peer networks.

One main conclusion

The Yahoo! study came to one main conclusion: Men are getting more involved in every aspect of family life. Men are now taking equal responsibility as their spouses for household activities such as managing the budget, grocery shopping, caring for children and planning vacations – and involvement has grown quickly in the last few years.

Eddie in Chicago summed up this new trend: “I always said I was going to be one of those fathers who is with his children as much as possible. I didn’t want to be that father who always works; I wanted to be there as much as I can.”

The dad respondents said fatherhood “changed them emotionally” and this shift in mind-set caused them to have a greater desire to shop for the best products and get the best deals for their families. Over 80 percent of men in the study said they already have a say in over 10 household purchases per year and would like to be more involved in purchase decisions. These changes also create a greater desire to get the best deals and take charge, with 94 percent of dads citing the desire to be a smarter consumer and 86 percent wanting to be more in control over purchase decisions.

Why are dads suddenly more involved in family life and thus making more of the household purchase decisions? The research points to two high-level trends that have caused this shift. First, the economic downturn in the past few years has hit men particularly hard. Some of the men in the study were laid off or had to accept lower-paying or part-time jobs, forcing them to take on more central roles at home while their wives worked.

Secondly, men today are more open to non-traditional roles and are eager to be deeply involved in their children’s lives. Steve in Portland, for example, always planned to be a stay-at-home dad. “When we got married, we always knew she would be the working one and I would stay home, if at all possible,” he said.

Equal decision makers

Modern dads want to make informed, responsible purchase decisions jointly with their partners – but they often have trouble getting the information they need about products, because marketers don’t speak to them directly. Contrary to popular belief, the study found dads are now equal decision makers with their spouses for health-related OTC products, CPG items, clothing or apparel, household goods, toys, personal care products and

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child and baby care products. These product categories have traditionally been almost wholly controlled by women – and thus the majority of marketing messages in these categories are geared toward moms.

Some 83 percent of participants said they read articles about items they're interested in purchasing and the same amount discuss products with friends. Meanwhile, 81 percent of men said they often visit stores to shop for household products they've actively researched and 67 percent said they'd discussed products on social networking sites. Forty-six percent of respondents said they use their mobile phones as part of the shopping experience to call home while in the store, check prices and availability, read reviews, research brands or make purchases.

Out of the loop

Unfortunately, the study found that men often feel out of the loop when it comes to understanding products they're interested in buying. They feel ignored by brands because most marketing messages are geared toward women. In short, dads are actively researching purchases and seeking validation online and through friends and social media sites but are not finding this information from brands.

When thinking about how dads are portrayed in TV commercials as the stupid, can't-do-anything father, Kenny in Portland said, "I honestly kind of find it offensive. It makes me feel like they [advertisers] don't really consider me important."

According to the study, dads can relate to ads for autos, finance, sporting goods and consumer electronics but a large percentage of men feel ignored by marketing campaigns for traditionally-female categories, such as personal care (61 percent), clothing and apparel (66 percent), home goods (52 percent), CPG (52 percent), pet supplies (42 percent), toys (44 percent) and child and baby products (57 percent).

The key takeaway from the research is that men – and especially dads – have become more involved in every aspect of family life, including making household purchase decisions. Yet dads feel ignored by marketers – who spend the bulk of their advertising and demographic research dollars trying to reach women buyers – and so instead turn to social networks and peers to get information on products they're interested in buying.

Tremendous opportunity

There's a tremendous opportunity for brands to build loyalty with this growing audience by creating messages that speak to men. Here are a few tips marketers can implement when creating campaigns geared toward men:

- In the more traditional categories of auto, finance, consumer electronic, sporting goods and entertainment, continue to blend practical information with humor and style. Many of the men in the study found that ads like the "Toyota Swagger Wagon" from Saatchi & Saatchi really spoke to them as modern dads.
- In the more secondary categories of health, toys and travel, provide evidence as to why men should purchase these products. Men want to know more but are often left out of the ads.
- In the more unconventional categories for men, such as CPG, pet, home goods, personal care, apparel, child and baby care, provide detailed information and acknowledge that men have a stake in these purchases. Men know less about these categories so they're looking for information they can use to make smart purchases.

Identify ways to connect

As we discovered during our research, dads like humor, free trials, are generally more open to advertising and have larger social networks than women. Brands need to take these findings into consideration and identify ways to connect with dads online. A good start is to acknowledge in campaign messages that mom is no longer the sole controller of the household purse strings. Brands that create deep connections with dads today will capture a larger share of household purchases in decades to come.

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••• the business of research

We have our marching orders

C-level MR users offer researchers a self-improvement plan

| By Brett Hagins and Melanie Courtright

snapshot

A survey of 450 corporate execs netted tangible examples of the impact of research and tips on how MR can raise its internal profile.

In some companies, marketing research has descended into commodity status because of a failure to explicitly demonstrate its contribution to business outcomes. As researchers we know the value of what we do but if senior management is not able to see the return on their research expenditures, it is difficult for them to view research as an investment and in fact more likely that they will view it as a sunk cost.

To help develop strategies for raising the profile of research among C-level executives, Research Innovation and ROI, Plano, Texas, partnered with Plano-based Research Now to execute a study on senior executives' perceptions of the research function. We targeted C-suite executives (including CEOs, CMOs, CIOs, CFOs, etc.), vice presidents and directors of marketing (executive, senior, etc.) and vice presidents of other functions who had engaged in at least one research project in the last 12 months through their corporate research department. Respondents were required to work in companies with $250 million in revenue or greater. Approximately 60 percent of respondents had commissioned three or more research projects in the last 12 months and about two-thirds came from organizations with revenue of $1 billion or more. Despite the difficulty of reaching such a targeted group of senior executives, Research Now provided over 450 completed surveys to meet the sample quota for this study.

Biggest impact

Executives were asked on an unaided basis, "What is the biggest impact your research department has had on your business that you can remember?" Many were not able to articulate a specific impact but some of the most inspiring answers include:

Increase sales/profit/retention/market share

"Increased sales by 12 percent."

"Provided research to change our packaging color, which increased sales by 10 percent."

"Advanced IT services by investigating the offerings of competitors. Increased server space

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led to increased consumer traffic, which ultimately drove profits."

"Research department identified new customers in existing markets ... increasing sales and profit."

"Created several new revenue streams."

"Provided competitive insights to help win deals."

"Increased retention."

"Led us to implement a new pricing strategy that increased market share and revenues."

"Increased product sales compared to prior year by 22 percent and decreased costs by 9 percent."

"Thanks to the work of the department, in the past year, our profit increased by 20 percent."

"Creating a warranty program. Created additional revenue without adding additional employee costs."

"Development and launch of a new product in less than nine months, which led to significantly increased market share and sales."

Product development and positioning

"Enabled the company to introduce a new product to Asia-Pac and provided leads for all the necessary groundwork ... and accurately forecasted revenue over three years."

"Created a completely innovative product that will be a game-changer for the company."

"Helped to successfully reposition a mature product, resulting in a re-invigorated and highly effective marketing communications program."

Halted/stopped unprofitable programs/reduced costs

"Stopped us from pursuing a product line development which would have turned out very negatively from a financial point of view."

"Accurately evaluated a product opportunity that kept us from spending a lot of money that was not needed."

"[Facilitated] expansion ... which market and what strategy."

"Discovered possible drilling conflicts before work commenced, therefore saving possible issues with clients and costs."

"Kept us from making a bad acquisition."

"Were able to cut down on cost by analyzing why people were calling our customer service line and coming up with ways to prevent those calls."

Identified product/market/ opportunities

"Moving the product selection to an arena not previously considered. Confronted a market leader and gained significant market share."

"Strategy to enter China market."

"Our research department was extremely helpful in uncovering new, formerly untapped, customers."

"Realizing the clients that were not being serviced in a particularly lucrative marketplace. Once identified, made impressive inroads to increase market share."

"Uncovered new international markets for our product."

"Identified market opportunity/ gap and led product development to build what previously didn't exist."

"Product portfolio planning. Identifying trends that led us to pursue a highly successful product option."

"Research enabled decision to move forward with a new business."

Business-relevant outcomes

As the above responses indicate, research is, in fact, delivering a range of business-relevant outcomes for the companies that are commissioning it. But if profitable end-results aren't enough to raise research's profile, what else can be done? To find out, we asked the executives this question: "What do you think is the single most important thing research can do to increase status and visibility in your organization?"

Increase knowledge of/ integration with financials

"Be more business/financial-oriented."

"They simply need to better understand the financial impacts and economics of our sales, marketing and new product revenue. We need to provide them with more economics instruction from our finance department."

"Tie research to internal revenue figures and lifetime customer value metrics."

"If they knew the business better; sometimes the results don't pass the smell test."

"Bring a business case to the presentation to let us know what it is you are recommending."

Get in front of the business

"Proactively address business issues."

"Become more educated in the emerging segments of digital space instead of continued focus on the same things year after year."

"Use research to drive ideas."

"Anticipate needed research and better understand business problems."

"Bring new things to the table. 'Hey I saw this' or 'This is an emerging trend.' Be a beacon for the business."

"Lead the business."

"Actionable recommendations."

"New ideas and avenues for revenue increases."

"Analyze market trends and suggest strategic offerings/product positioning AHEAD of market developments."

"Be proactive in helping us figure out where we could benefit from research."

"Predict the future."

"Continue to tie research objectives to the strategy and highest priorities of the organization – get 'in front' of the organization."

"Lead overall long-range planning efforts."

Improved reporting structure

"The head of the research department has to be in a higher position. That could help them to be partners in the decision-making process rather than just a service."

"Cross-training – career path w/ experience in NPD and sales."

"Have individual with research background elevated or brought in to executive leadership team."

"Generate more champions on the board of directors."

More internal marketing of research/PR

"They need to do more internal marketing. They tend to allow the other departments who use their output to take the lead and therefore they (the other department) gains the status. Also, they tend to react rather then lead in some situations."

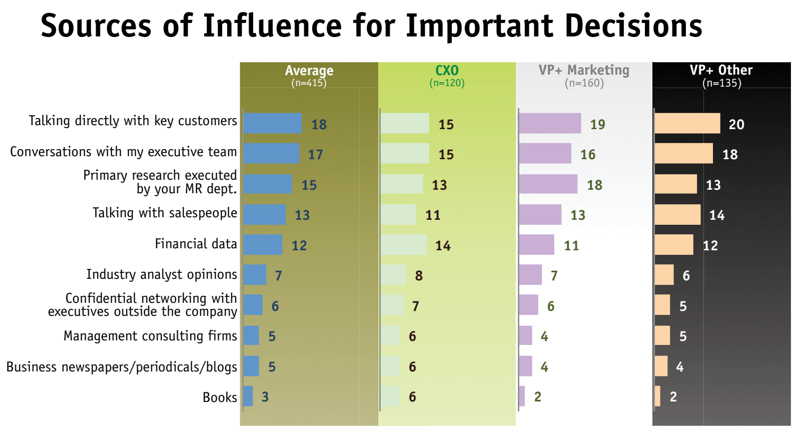
"Show that all followed recommendations have become a success."

"Be more vocal about impact of research."

"Improve 'in-house' relationships."

"Follow up on decisions to show results of making or not making the decision to proceed."

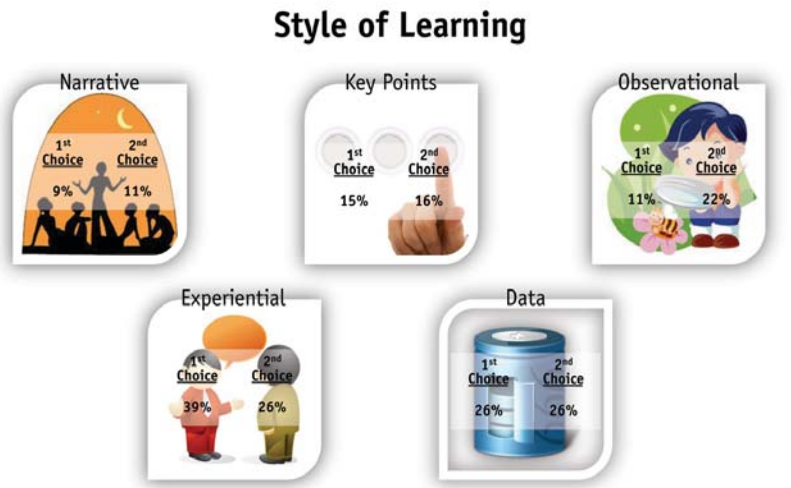
Figure 1



Base: Those who said market research or insights was commissioned, authorized or influenced projects in last 12 months and are CXO, v.p.+ marketing or v.p.+ other.

Q5. Next, please think about how you make important decisions and the information or people that may or may not influence those decisions. Please assume these decisions are about a major new product launch. Please allocate 100 points in assessing how impactful each of the following sources is on critical decisions, giving more points to those sources that have greater influence and fewer points to those that have less. Please ensure that the points add to 100.

Figure 2



Base: Those who said market research or insights was commissioned, authorized or influenced projects in last 12 months (n=485).

Q6. Which of the following most closely characterizes your style of learning or how you most like to learn new information? Please select your top two learning styles based on the descriptions below. "1" equals your first choice and "2" equals your second choice.

"Take credit as business owners for contributions to the business."

"Be more verbal on accomplishments/influences."

Makes the difference

Each of these suggestions is critical. The reporting structure often influences whether research is engaged in top-level strategy decisions or whether it is engaged tactically after more strategic questions are already decided. Integrating research with the financials makes the difference between research being one of many inputs in the decision-making process and research driving the organization. Too often, research provides lagging indicators rather than leading ones. Leading the business necessitates using the research as a catalyst to drive consensus among different constituents and convergence among different influences in decision-making.

Figure 1 summarizes what we found when we asked executives to allocate 100 points to different sources of influence on their decision-making process.

Does not mesh well

Researchers are trained to strive for precision and rigor but a methodologically perfect research study is worth little if it does not mesh well with how executives want to learn new information. We asked executives to self-classify into one of five primary and secondary learning styles.

Key points: *I prefer to have the information summarized into a few bullet points.*

Narrative: *I like to learn new insights through a narrative or story on the customer mind-set.*

Observational: *I prefer to learn from a visual exposition of consumer experiences such as pictures and videos or observing them in their natural environment.*

Experiential: *I prefer to learn by interacting directly with consumers, customers or prospects to discuss their underlying motivations.*

Data: *I prefer to learn by seeing the quantitative data that leads to new insights or conclusions.*

As shown in Figure 2, the top learning style, experiential, suggests that research needs to facilitate direct contact between senior management and carefully-chosen respondents who personify the insights that might normally be showcased only in a quantitative report. Also, while senior executives will frequently just ask for a bulleted summary in the interest of saving time, if the information is truly new and may lead to a change in perspective, many need to see all of the supporting data for the story to be credible and persuasive.

The full scope of the study includes a series of benchmarks for corporate research departments on various dimensions of business value – including the propensity for research to impact sales, market share and cost savings. (For additional information on the study, watch a recorded Webinar at http://linktrack.info/c-level_advocates [registration required]). By better understanding the impact of all of these factors, corporate research leaders may then begin to understand how their department compares to their peers and develop strategies for improving the profile and standing of the research function.

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••• online research

Apples to apples to apples

An approach to selecting online respondents

| By George Terhanian

snapshot

What can a 12-year-old teach us about developing sample for an online tracking study?

Critics of online research tend to focus on sample representativeness. In 1999, for instance, Warren Mitofsky maintained that no matter how researchers adjust the results of a survey among respondents selected by any means other than probability sampling, they would be unable to correct for the biases that arise from the difference between the sample and the population of interest. As he put it, "the willingness to discard the use of sampling frames as a means of selecting a sample and then the feeble attempts at manipulating the resulting bias … undermine the credibility of the survey process" (Mitofsky, 1999, p. 26).

Nine years later, Jon Krosnick contended that there is no theoretical justification by which an opt-in panel of potential survey respondents (selected by means other than probability sampling) can constitute a credible sampling frame for surveys that purport to represent the attitudes, opinions and behaviors of a broader population. According to Krosnick, "to draw a scientific and representative sample of all residents … it would be necessary to use a procedure that gives every member of that population an equal (or known) probability of being selected to participate in the survey" (Krosnick, 2008, p. 8).

Even more recently, Gary Langer "pilloried online polling, calling their sampling frame 'a club of people who signed up to take point-and-click surveys for points redeemable for cash and gifts'" (Shepard, 2012). Like Mitofsky and Krosnick, Langer believes that "non-probability samples lack the theoretical underpinning on which valid and reliable survey research is based" (Langer, 2009).

Despite these criticisms, the growth of online research during these years has been nothing short of astonishing, driven heavily by research buyers with a deep interest in transitioning tracking surveys from telephone data collection to online in order to reduce costs. Unfortunately, some of these buyers have been burned badly for the very reason cited by Mitofsky, Krosnick and Langer: the failure to ensure that the characteristics of the sample they selected was consistently representative of the target population from wave to wave.

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And the evidence suggests that these difficulties may be increasing rather than decreasing.

Does a solution exist? If so, to whom might we turn to identify it? How about a 12-year-old boy who wants to make the best possible apple juice for his mom and dad?

When my nephew Ryan came to New York to visit me last July, we decided to try out the juice-making machine that Ryan and his sister Jordan had given me for my birthday in December. Because there was no fruit in my apartment, we set out for the nearest supermarket, the Food Emporium.

Ryan had his heart set on apple juice but was unimpressed with the slim selection. After examining more than 50 apples, he was able to find three perfectly round ones that appealed to him. We then headed north to Trader Joe's, where Ryan found only two yellow apples to his liking. So we walked a few blocks farther north to the Fairway, where Ryan was again underwhelmed. This time he picked just three red ones so we were still two short of our goal of 10.

Discouraged, we headed for home, pinning our hopes on the fruit vendor on 67th and Broadway. I had bought nothing from him in three years. To our surprise, we found two apples – one small, one large – that passed muster.

Transforming the apples into juice proved easy. A few noisy minutes later, we had enough delicious juice to last a couple of days. By the time Ryan's parents arrived to retrieve him on Sunday, though, none was left. Ryan had called, texted and e-mailed about the amazing juice, so to give his parents a taste he asked me to accompany him on a second apple quest.

As we had done before, we began at the Food Emporium. This time, not one apple met Ryan's standards. We did better at Trader Joe's, leaving with three green ones. Fairway had something to offer too: four red apples that Ryan found a perfect match to those he had selected the first time. Still three short of our goal, we walked back down Broadway to visit the fruit vendor across from my building, but he was nowhere to be found. So we walked another eight blocks to Whole Foods and found three small yellow apples, reaching our target of 10.

When his mother finally tasted the perfect juice, she asked Ryan how he had selected his apples. Ryan cited the apples' color, size, shape, feel, firmness and price. He said he processed all of those qualities simultaneously each time he chose an apple. Although he scrutinized more apples on Sunday than on Wednesday, he did not seem to mind. He wanted to get it right.

Ryan's approach was to select an optimal sample of apples to act as a baseline, against which apples from any number of other stores could be compared to make sure their characteristics match the base.

Meets a predetermined standard

Selecting nearly identical apples on multiple occasions is analogous to selecting nearly identical respondents for multiple waves of an online tracking survey – the kind that attempts to measure change over time. In both cases, the key lies in examining each apple, or each respondent, thoroughly at the time of selection to ensure it meets a predetermined standard. Other possible methods for ensuring a match, such as buying from one go-to store or relying on respondents from one trustworthy source, are prone to failure.

If Ryan and I had shopped only at the Food Emporium on both days, for instance, we could easily have taken 10 apples home each time but they would have been inferior to the ones we purchased. Likewise, if we had attempted to buy the same number of apples from the same stores on Sunday as on Wednesday, we would have gone home with a bagful of lower-quality apples. The fact that the fruit vendor was missing on Sunday would have made the task impossible anyway.

Market researchers who commission or run tracking studies tend to make different assumptions from those Ryan made. Many assume that the characteristics of respondents who originate from each sample source they use do not change over time. That would be akin to Ryan assuming that the characteristics of the apples from any one store are the same over time.

Other researchers rely on respondent-selection methods, such as quota sampling based on individual characteristics such as age, gender, and region, that fail to encompass respondents' key characteristics. (Researchers who rely on quota sampling to select respondents for surveys typically begin by dividing the target population into a set of mutually-exclusive groups before they then specify how many respon-

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dents to recruit from each group.) Such quotas may even produce skews (e.g., too many non-working people, too few married people) that affect sample composition as well as the outcomes of interest. The obvious alternative – to add quota variables such as race/ethnicity, income, education level, marital status, employment status, and possibly others – isn't feasible through conventional approaches, because it requires an enormous number of quota cells. As a result of the assumptions and the associated decisions they make, some researchers – perhaps many – end up mistaking sample composition changes for changes in what they are trying to measure. That mistake defeats the purpose of running a tracking survey in the first place and wastes time and money.

Although Ryan is only 12, he could probably teach those researchers a lesson or two. He would likely suggest that when selecting respondents for tracking surveys, the characteristics of the respondents are of far more importance than the source from which those respondents originate. He might also point out a practical benefit of such a position: It opens the door to interviewing respondents from virtually any source, rather than just a handful of previously vetted ones. Today, no one seems to be offering researchers such advice.

Knew next to nothing

At this point, it may be useful to provide some additional background information. Fifteen years ago, market researchers knew next to nothing about online research. Back then, almost all interviews were completed via telephone, paper-and-pencil or face-to-face. Today, researchers know much more about online research and most interviews (specifically, those commissioned by U.S. market research buyers) are completed online. U.S. spending on online surveys is expected to exceed $1.8 billion in 2012, and European spending to surpass €0.7 billion (*Inside Research*; 2012a, 2012b).

To keep up with online demand, some market research companies have developed new methods of accessing potential survey respondents, such as river sampling, whereby online users, after clicking through an invitation or advertisement on a Web site, are directed to a survey for which they might qualify. Some companies have introduced routing systems, as well. Among other capabilities, such systems direct individuals who do not qualify for one survey to take another, which can increase overall capacity.

Despite these advances, researchers often find it difficult to complete the needed number of interviews on time, particularly when the target population is rare or in high demand. Hence there is a need to use more than one sample source for some types of studies, such as tracking surveys.

Unfortunately for researchers who've elected to use multiple sources, some evidence suggests that this decision may increase bias. In research conducted in 2008 that explored the quality of survey data from 17 different opt-in panels, for instance, the Advertising Research Foundation found "wide variance, particularly on attitudinal and/or opinion questions (purchase intent, concept reaction, and the like)," even after holding constant socio-demographic and other factors (Walker et al., 2009).

Since that time, some researchers have launched new research to understand how to select multiple sample sources for the same survey. For instance, Mitch Eggers has described the Global Market Insights Pinnacle methodology quite positively at industry conferences (see Eggers, 2011) while Steve Gittelman and Elaine Trimarchi (2009) have made the case for the merits of Mktg. Inc.'s Grand Mean Project at some of those same conferences and elsewhere.

Typically, proponents of the new approaches cite three main benefits: consistency (or interchangeability) of new respondent sources with existing ones; complementariness of new respondent sources with existing ones relative to an external standard; and enhanced representativeness relative to the U.S. general population through calibration with non-online data sources.

In my view, there are, however, at least three downsides to those approaches: they restrict the pool of potential respondents to those from sample sources vetted beforehand, which reduces respondent supply; they assume that the vetted sample sources do not change over time; and they rely on benchmark data sets that have either short shelf lives or uncertain external validity.

Would cringe

My nephew Ryan would cringe if someone advised him to select apples that way. Such a method would force him to accept artificial limitations (e.g., you can only shop at a handful of previously-approved stores; you cannot spend time scrutinizing each

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Table 1

Apple	Wednesday	Sunday
1	C1S3SF1FE1H1P1	C1S3SF1FE1H1P1
2	C2S3SF2FE1H1P2	C2S3SF2FE1H1P2
3	C2S3SF1FE3H2P2	C2S3SF1FE3H2P2
4	C3S1SF3FE2H3P2	C3S1SF3FE2H3P2
5	C2S2SF2FE1H1P3	C2S2SF2FE1H1P3
6	C1S1SF1FE3H2P3	C1S1SF1FE3H2P3
7	C1S3SF3FE2H3P3	C1S3SF3FE2H3P3
8	C1S2SF2FE1H1P3	C1S2SF2FE1H1P3
9	C3S1SF1FE2H2P2	C3S1SF1FE2H2P2
10	C3S3SF2FE1H2P3	C3S3SF2FE1H2P3

apple) that he would not understand, let alone accept. As you might recall, Ryan explained to his mother that he evaluated each apple's color, size, shape, feel, firmness and price simultaneously when deciding whether to purchase it. For our purposes here, let's assume that each of these six attributes has three levels, as described below:

Color (C): (1) Red, (2) Green, (3) Yellow
Size (S): (1) Small, (2) Medium, (3) Large
Shape (SH): (1) Perfectly Round, (2) Imperfectly Round, (3) Other
Feel (FE): (1) Smooth, (2) Somewhat Rough, (3) Very Rough
Firmness (F): (1) Very Hard, (2) Firm, (3) Soft
Price (P): (1) Low, (2) Medium, (3) High

After Ryan selected 10 apples from four stores on Wednesday, he sought 10 apples on Sunday with exactly the same characteristics as Wednesday's haul. That was easier said than done, given the number of attributes (6) and the number of levels within each attribute (3). There were 729 possible unique combinations (or three to the sixth power). Imagine how daunting a task it would have been if there had been, say, 10 attributes and 5 levels of each. In that case, there would have been 9.7 million possible combinations.

One way to evaluate how similar the apples that Ryan selected on Wednesday were to those he picked on Sunday is through a simple analysis whereby we code the 20 apples, as shown in Table 1, then compare the codes.

An eyeball analysis of the codes suggests that Ryan got it right. Now imagine if he had selected 10,000 apples rather than 10 on each occasion. To say the least, it would have been difficult to assess how close to identical the two samples were by eyeballing them. Fortunately, there are other options. Through logistic regression, we can estimate each apple's probability (0 to 100 percent) of being in one day's haul, say Wednesday's rather than Sunday's.

We know, moreover, that apples with the same probability, which researchers also refer to as a propensity score, would share the same joint distribution of characteristics – that is, their characteristics would be nearly identical (Rosenbaum and Rubin; 1983, 1984). And if the distribution of propensity scores of Wednesday's apples was nearly identical to that of Sunday's, it follows that the apples would be nearly identical as well.

An additional output of the exercise would be a statistical model, which we could then use on each future shopping trip to estimate each new apple's similarity to a benchmark before selecting it. That would be the best way to ensure near-identicalness from shopping trip to shopping trip – or, in the case of a tracking survey, wave to wave. The approach would also obviate the need to rely on conventional (i.e., mutually-exclusive) quotas on a limited number of characteristics. Why? Because the propensity score is a single, summary measure of a respondent's entire set of characteristics. In practice, this means that the statistical model can include an exceptionally large number of characteristics. That's a major advantage over conventional quota-sampling approaches.

Will the approach work for market researchers who commission or run online tracking surveys? As described elsewhere (Terhanian and Bremer, 2012), initial empirical evidence suggests that this is an excellent way to ensure that the characteristics of a sample closely reflect those of a known population. The evidence suggests, as well, that the methodology, referred to commercially as SmartSelect, enables market researchers to choose online survey respondents who provide more accurate information than respondents chosen by other means. Perhaps the last thing to mention here about SmartSelect is its intuitive appeal. It is difficult to think of another methodology that mirrors the steps a 12-year-old takes when deciding which apples to buy to make great-tasting apple juice for his parents.

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Names of Note

Hardison

■ *Amtrak*, Washington, D.C., has named **Matt Hardison** chief marketing and sales officer. Research will be among his responsibilities.

■ **Roy Luebke** has joined *Genedge Alliance*, a Martinsville, Va., government agency, as growth consultant. Research will be among his responsibilities.

■ *OraSure Technologies*, a Bethlehem, Pa., oral fluid diagnostics company, has appointed **Kathleen G. Weber** as senior vice president and general manager, consumer products.

■ **Robert Barocci**, president and CEO of the *Advertising Research Foundation* (ARF), New York, has announced his retirement. Barocci will continue with the ARF through 2013 as an executive transition specialist.

■ Austin, Texas, research company *Illuminas* has hired **Mark Driscoll** as research manager.

■ *Horizon Media*, New York, has hired **Kirk Olson** as director, TrendSights.

■ **Lisa Pearson** has been named executive vice president, marketing, at *Bazaarvoice Inc.*, an Austin, Texas, research company.

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Clark

■ Salt Lake City research company *Allegiance* has named **Carine Clark** president and CEO.

■ Washington, D.C., research company *Heart+Mind Strategies* has hired **Don Hawk** as senior solutions consultant.

■ **Eric Simon** has joined *FRANdata*, an Arlington, Va., research company, as senior client solutions executive, business intelligence services.

■ *Healthcare Research and Analytics*, Parsippany, N.J., has appointed **Oleh Denysyk** as president.

■ *MarketVision Research*, Cincinnati, has hired **Nate Delinger** as custom software developer; **Courtney Shannon** as research assistant; **Anna Waitas** as senior research associate; and **Scott Hanson** as vice president, client services.

■ **John J. O'Connor** has joined Bethesda, Md., research company *Abt Associates*' board of directors. Separately, Abt Associates has named **John Ruyter** vice president, human resources.

■ New York advertising media company *Telmar* has named **Mark W. Kostelec** vice president, group director, data insights.

■ *Research Now*, Plano, Texas, has promoted **Jason Bowen** to vice president, client development, Canada. Bowen will be based in the company's Toronto office.

■ *Dialsmith*, a Portland, Ore., research technology company, has promoted **Eric Alzuhn** to vice president, client services, and **Dan Welch** to vice president, products and support. Dialsmith has also hired **Brian Izenson** as marketing manager.

■ Paris research company *Ipsos* has appointed **Harald Hasselmann** as country manager, South Africa. Hasselmann will be based in Johannesburg.

Creamer

■ **Sean R. Creamer** has been appointed president and CEO of Columbia, Md., research company *Arbitron Inc.*

■ **Emily Kettle** has been promoted to managing director of *Facts International*, an Ashford, U.K., research company.

■ **Jo Winning** has joined London research company *Verve* as business development consultant.

Bryant

■ *Thoroughbred Research Group*, Louisville, Ky., has named **David A. Bryant** vice president, health policy research. Bryant will be based in Washington, D.C.

■ New York research company *TNS* has hired **Mike Everett** as global head of stakeholder management. Everett will be based in London.

■ **Steven Kaiser** has been named director of research, Southeast Asia, at *Effective Measure*, a Melbourne, Australia, research company. Kaiser will be based in Singapore.

■ *Perception Research Services*, Teaneck, N.J., has promoted **Jenic Mantashian** to vice president, qualitative research.

Research Industry News

News notes

■ **The Marketing Research Association** (MRA), Washington, D.C., filed comments with the **Federal Trade Commission** (FTC), Washington, D.C., regarding an enforcement action against Boston marketing research company **Compete Inc.**

The FTC proposed a consent agreement with Compete on October 29, 2012, to settle alleged "charges that it violated federal law by using its Web-tracking software that collected personal data without disclosing the extent of the information that it was collecting [and] allegedly failed to honor promises it made to protect the personal data it collected." The consent agreement proposed by the FTC requires "Compete and its clients to fully disclose the information they collect and get consumers' express consent before they collect consumers' data in the future. In addition, the settlement bars misrepresentations about the company's privacy and data security practices and requires that it implement a comprehensive information security program with independent third-party audits every two years for 20 years."

The Electronic Privacy Information Center (EPIC), Washington, D.C., submitted comments on the Compete agreement on November 19 and MRA filed comments on December 21 in response to EPIC's proposals, urging the FTC to reject EPIC's proposed additions to the Compete consent agreement.

EPIC urged the FTC "to (1) strengthen the Order by requiring Compete to implement Fair Information Practices similar to those contained in the Consumer Privacy Bill of Rights; (2) make Compete's independent privacy assessments publicly available; (3) clarify the scope of implicit deception in the context of privacy policies; and (4) develop a best practices guide for anonymization techniques." MRA maintains that none of these four ideas would prove positive for the research profession.

Acquisitions/transactions

■ New York researcher **The Nielsen Company** has agreed to acquire Columbia, Md., research company **Arbitron Inc.**

■ London research company **Kantar Media** has acquired Chicago media intelligence company **AdGooroo**.

■ Paris marketing company **Publicis Groupe** has acquired Mumbai, India, marketing consultancy **MarketGate** and **MarketGate Dimensions**, its research division.

■ Montréal research company **Leger Marketing** has acquired majority stake in **Agility Metrics Inc.**, a Montréal customer experience management software company. Agility Metrics will be renamed Leger Metrics.

Association/organization news

■ Vancouver, B.C., research company **Vision Critical** has become a corporate member of the **Marketing Research Intelligence Association**, Toronto.

Awards/rankings

■ **The Marketing Research Institute International**, St. Louis, and **The University of Georgia**, Athens, Ga., awarded Ronald Kornokovich the Distinguished Service Award and Emeritus status in December 2012.

■ Fresno, Calif., research company **Decipher Inc.** was named to the 2012 Lead411 Tech 200 list, which ranks companies based on revenue percentage growth from 2008 to 2011 among privately-held business in the U.S. that earned more than $1 million in the past year.

New accounts/projects

■ New York clothing company **Bonobos** has adopted the Qualtrics Research Suite platform from Provo, Utah, research software company **Qualtrics**.

■ **Datatelligence**, an Ormond Beach, Fla., research company, has adopted Oslo, Norway, research company **Confirmit**'s Confirmit Horizons Market Research platform.

■ **The Arbeits-gemeinschaft Fernsehforschung**, a Germany TV audience research cooperative, has extended its contract with Nuremberg, Germany, research company **The GfK Group** to continue monitoring TV viewing in Germany until 2018.

New companies/new divisions/relocations/expansions

■ Salt Lake City research company **The Modellers** has formed its Strategic Analytics Unit, focused on big data and predictive analytics. Marco Vriens will lead the operation.

■ Manchester, U.K., research company **ResponseTap** has opened its U.S. headquarters in New York. J. Scott Hamilton will head the office.

■ **IBM** Armonk, N.Y., has announced plans to open an analytics center in Columbus, Ohio. The company aims to create 500 new analytics jobs over the next three years.

■ Framingham, Mass., research company **Kadence International** has opened a second U.S. office in Boston. The company plans to increase staff by 100 percent by 2014.

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CALENDAR OF EVENTS

••• can't-miss activities

The Marketing Research Association will hold its annual CEO summit on February 25-27 at the Fairmont Turnberry Isle in Miami. For more information visit www.marketingresearch.org/summit.

The European Networking Group will hold its annual consumer insights and marketing excellence conference on February 26-27 at the Crown Plaza in Amsterdam, the Netherlands. For more information and to register visit www.engspain.com.

The American Marketing Association will hold a conference, themed "Analytics with Purpose: The Human Edge of Big Data," on March 4-5 at the U.S. Grant Hotel in San Diego. For more information visit www.marketingpower.com/calendar/pages/analytics-with-purpose-the-human-edge-of-big-data.aspx.

The Neuromarketing Science and Business Association will hold its annual world forum on March 6-8 at the Renaissance Hotel in Sao Paolo, Brazil. For more information visit www.neuromarketingworldforum.com.

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GutCheck will host a complimentary Webinar, themed "Research Best Practices: How Innovative Brands Are Winning With An Agile Insights Approach," on March 7 at 3 p.m. EST. Matt Warta will present. To register visit www3.gotomeeting.com/register/986971358.

The Council of American Survey Research Organizations will hold its annual online research conference on March 7-8 at the Westin San Francisco. For more information visit www.casro.org.

The University of Texas at Arlington (UTA) will holds its annual conference for alumni of its Master of Science in Marketing Research program on March 8 at UTA. For more information visit http://msmralumni.org.

The Pharmaceutical Marketing Research Group will hold its annual national conference on March 10-12 at Gaylord National in National Harbor, Md. For more information visit www.pmrg.org.

Worldwide Business Research will hold a conference, themed "Next Generation Customer Experience," on March 11-13 at the Rancho Bernardo Inn in San Diego. For more information visit www.the-customer.com.

The Advertising Research Foundation will hold its annual Re:think convention and insights zone on March 17-20 at the New York Marriott Marquis in Times Square. For more information visit www.thearf.org/rethink-2013.php.

The Market Research Society will hold its annual conference on March 19-20 in London. For more information visit www.mrs.org.uk.

The American Marketing Association will hold a program, titled, "Marketing Research Academy for Business Professionals," on March 19-22 at the University of Georgia Terry College of Business Executive Education Center in Atlanta. For more information visit www.marketingpower.com/Calendar/Pages/marketing-research-academy.aspx.

Geoscape will hold a conference, themed "New American Mainstream Business Summit," on April 3-4 at the Conrad Hotel in Miami. For more information visit www.cvent.com/d/kcqsrr.

ESOMAR will hold its annual Asia-Pacific conference, themed "Asia on the Move," on April 7-9 in Ho Chi Minh City, Vietnam. For more information visit www.esomar.org/apac.

IIR will hold an event, themed "Total Customer Experience Leaders Summit," on April 8-10 at The Ritz-Carlton in Boston. For more information visit www.iirusa.com/totalcustomer/homepage.xml.

The Merlien Institute will host a conference, themed "Qualitative 360 Europe," on April 17-18 in Berlin. For more information visit www.qualitative360.com.

The Council of American Survey Research Organizations will hold a management conference on April 24-25 in New Orleans. For more information visit www.casro.org.

Walker Information will hold a conference, themed "B2B Customer Experience Summit," on May 1-2 at the Hilton San Diego Bayfront Hotel in San Diego. For more information visit www.walkerinfo.com.

IIR will hold a conference focused on innovation and collaboration on May 6-8 at the Seaport Boston Hotel and Adjacent World Trade Center in Boston. For more information visit www.iirusa.com/feiusa/home.xml.

The Customer Experience Professionals Association will hold its members meeting on May 14-15 at the Hotel Del Coronado in San Diego. For more information visit www.cxpa.org/?page=event_2013_MIE.

IIR will hold a conference, themed "The Future of Consumer Intelligence," (formerly known as the IIR's Technology Driven Research Event) on May 14-16 at the Wyndham Parc 55 in San Francisco. For more information visit www.iirusa.com/technology/homepage.xml. visit www.casro.org.

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.

2013 Research Software Directory

The 2013 Directory of Marketing Research Software was compiled by sending listing forms to companies we identified as producers/vendors of marketing research-related software. This year's directory lists over 150 firms and over 360 software titles. The software firms are arranged alphabetically. Along with the company's vital information, we've also included the title(s) of the software they sell.

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

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

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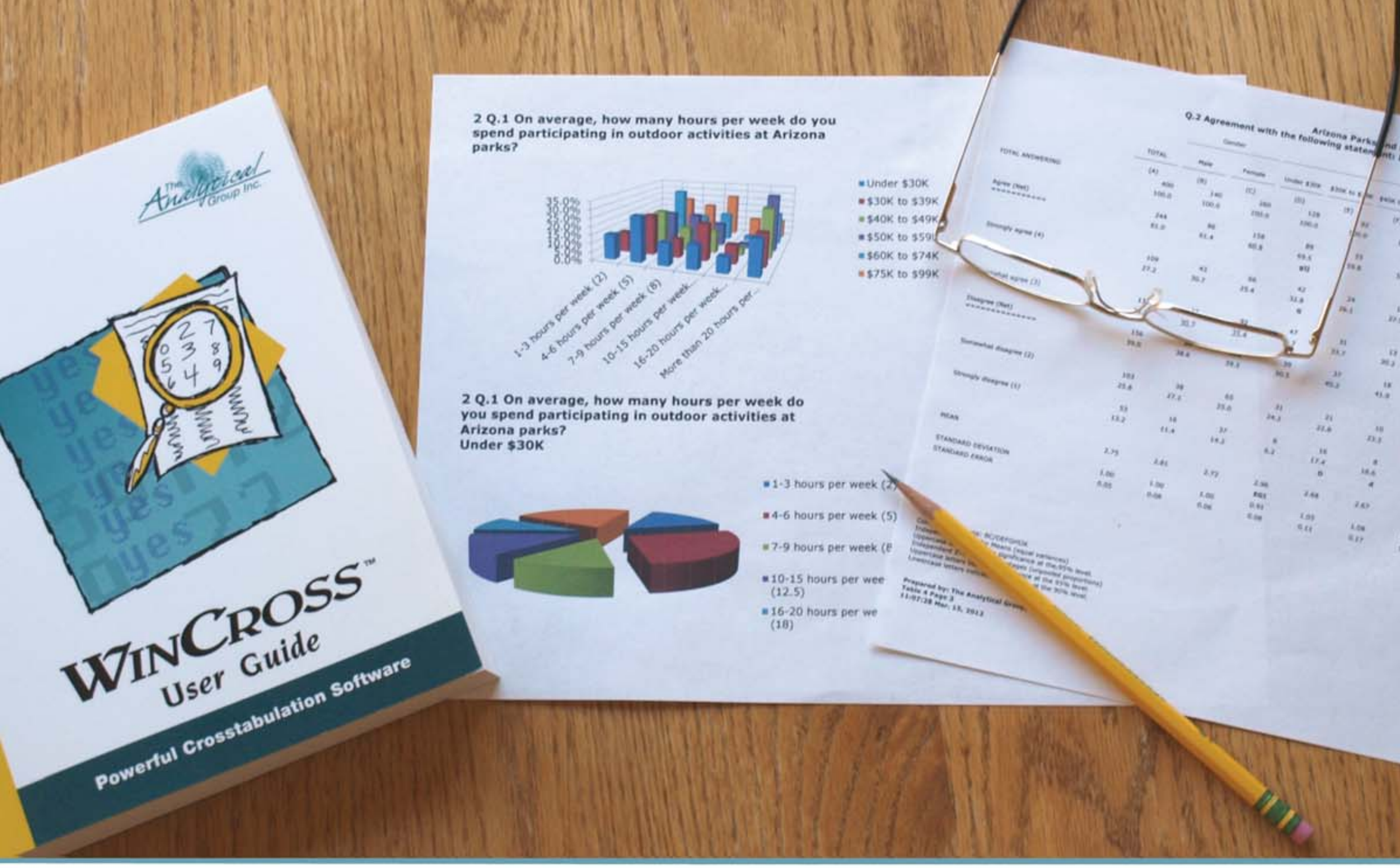
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(See advertisement on p. 69)

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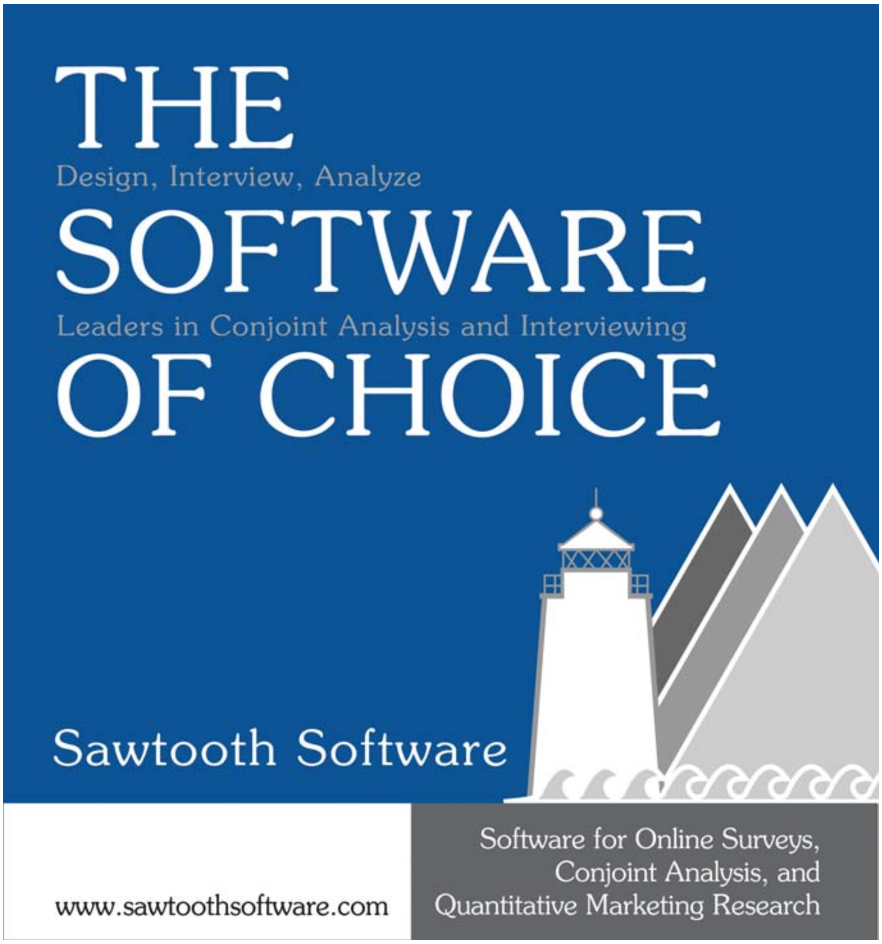
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(See advertisement on p. 73)

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(Telephone Interviewing Software)

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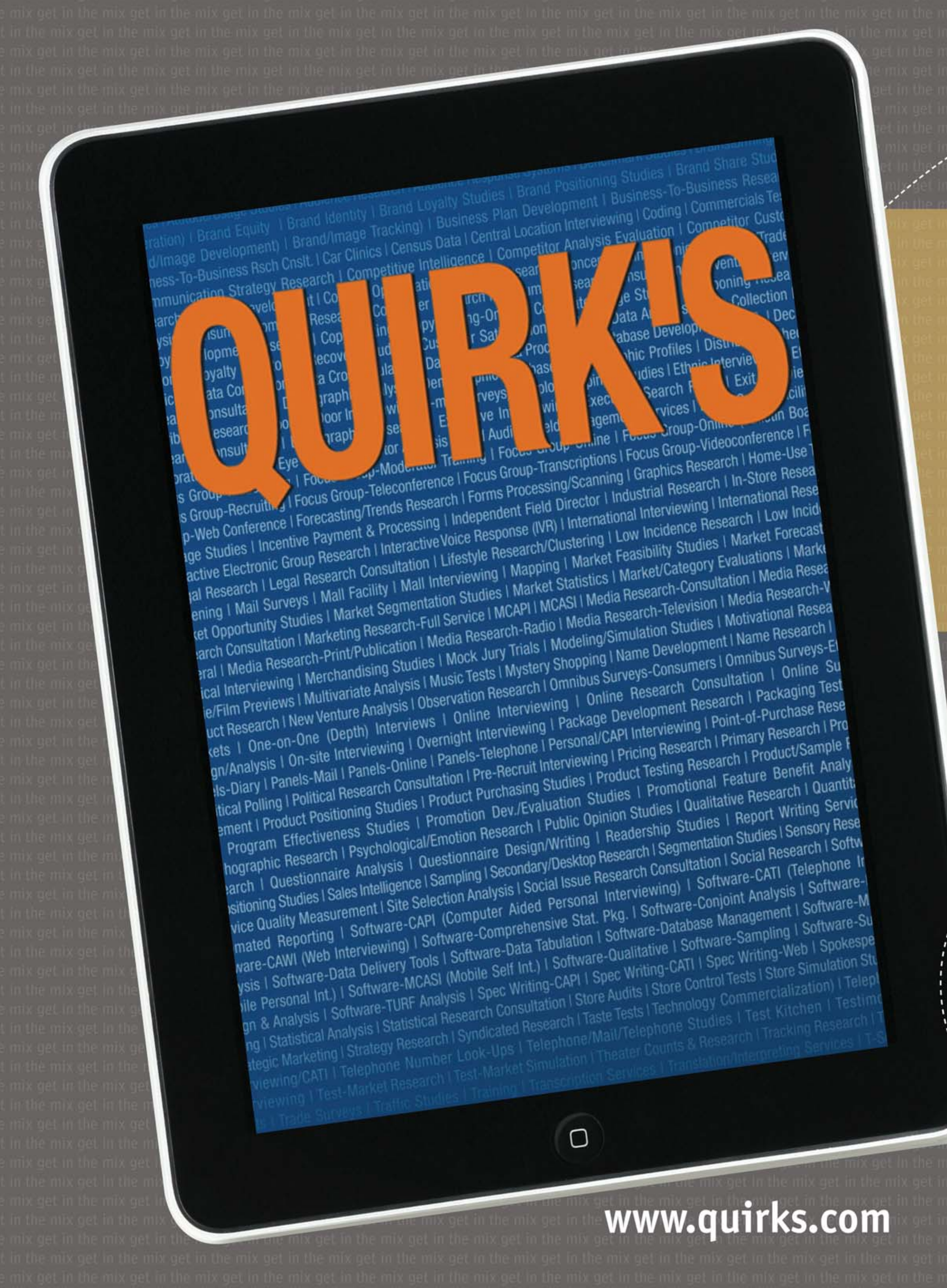
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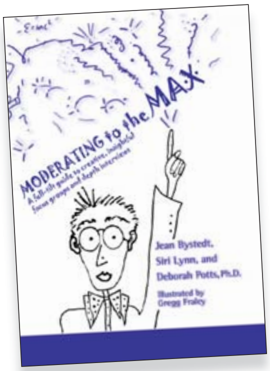
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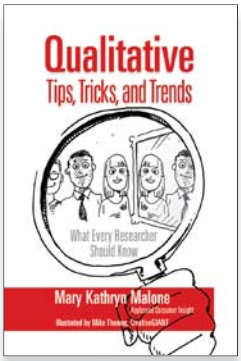
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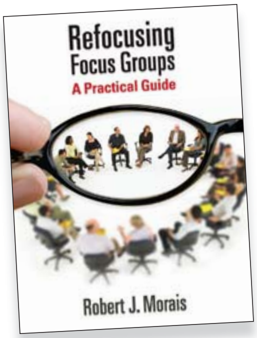
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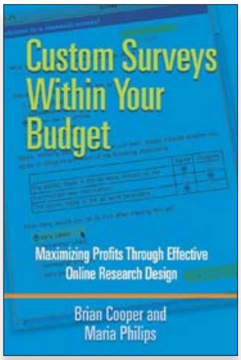
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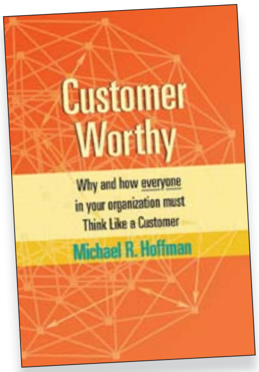
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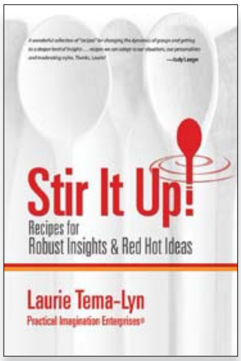
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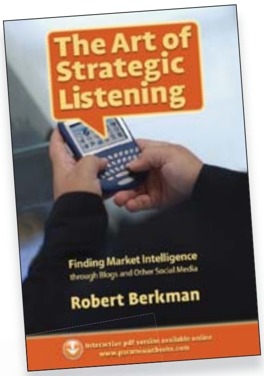
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16.3	Percent increase over 2011 Web traffic
3,228,138	Web site page views in 2012
61.2	Percent of visitors classified as "New Visitors"
7,582	Total pages on Quirks.com
5,652	New accounts created in 2012
43,515	Market researchers in Quirk's database
45.9	Percent of subscribers receiving the magazine digitally or via mobile app
3,741	Mobile apps downloaded
29,456	Number of members of Quirk's LinkedIn Group
319	Articles published in 2012
1,382	Number of magazine pages produced
51	Events participated in during 2012
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