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Marketing Research Review

AUGUST 2008

Green research

> Inside the mind of the eco-aware

> How do owners feel about hybrid cars?

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WE DEFINE PARTNERSHIP
Coming together is a beginning;
keeping together is progress;
working together is success.
–Henry Ford

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in case you missed it...

news and notes on marketing and research

Teens prefer real friends to online ones

The average teen may spend 11.5 hours a week online, but not everything is more appealing to teens in an online format. When asked a series of "would you rather" questions, teens chose reality over virtual reality in many aspects of their lives. Given the choice, teens would rather have real friends (91 percent) than online friends (9 percent), date someone from school (87 percent) than someone from the Internet (13 percent) and shop in a store (82 percent) than shop online (18 percent). Conversely, teens would rather get their locker vandalized (63 percent) than their homepage (37 percent) and IM a friend (54 percent) over calling (46 percent), according to Los Angeles research company OTX's study Teen Topix.

Twenty-four percent of teens are spending more than 15 hours a week online. Instant messaging came up as the most frequent activity, followed by visiting social networking sites, e-mail, searching and visiting virtual community sites.

Fifty-eight percent of teens have made a purchase online. On average, teens who make purchases online are spending $46 per month, and 26 percent of teens are spending $50 or more. Clothes and music are the two most popular online purchases, followed by books, electronics and DVDs. The bedroom (36 percent) and living room (24 percent) are the places teens are most likely to have their primary computer. Teens with their primary computer in their bedrooms are more likely to be heavy Internet users (15+ hours per week) and spend money online.

Teens are, however, aware of the risks associated with online life: 78 percent of teens are concerned about computer viruses, followed by identity theft (67 percent), unauthorized access to personal information (65 percent), scams (60 percent) and spam (60 percent).

The study also confirms the popularity of social networking sites, with 95 percent of teens saying they have belonged to a social networking site at some point. The average teen has signed up for over four social networking sites and currently belongs to two. Teens report learning about music, other Web sites, movies, TV shows and new trends from social networking sites. Teens are receptive to advertising on these sites, where the majority of teens learn about financial services (63 percent), movies in theaters (59 percent), mobile services and accessories (58 percent), travel (57 percent) and other Web sites (53 percent).

Personal care products go au naturel

When it comes time to choose personal care items, more and more consumers are jumping on the natural bandwagon, especially women and Hispanics. Research by Chicago research company Mintel reveals that the natural and organic personal care products market is valued at $465 million, up 35 percent since 2005 ($345 million).

The rising popularity of organic products and natural ingredients has prompted retailers to stock more of these products. Mintel's Global New Products Database shows a 53 percent increase in new organic and/or all-natural product launches in the past two years (from 554 in 2005 to 846 in 2007). Realizing the success of natural and organic products, large retail chains have begun to partner with natural and organic manufacturers to offer such products under an exclusive and limited time period. Such is the case with Walgreens and the Yes To Carrots brand, as well as Target with the Erbaviva line of products.

Other mainstream companies are utilizing natural ingredients in their brands and opting for certification to differentiate themselves from the competition. "The recent drive toward healthy and green living has consumers placing a high degree of trust in the 'all-natural' claim for personal care products," said Christopher Haack, senior analyst at Mintel.

The appeal of natural and organic personal care products stretches to both men and women, but women are typically the main users. Mintel also identifies Hispanics as a growing market for natural and organic personal care: 74 percent of Hispanics' total personal care product purchases were classified as being natural and organic.

The fad diet that's always in style: healthy eating

The percentage of adults on a diet has decreased by 10 percentage points since 1990, while the percentage of Americans eating healthier has increased. At least once in a two-week period, over 70 percent of Americans are consuming reduced-fat foods, and over half of them are eating reduced-calorie, whole-grain or fortified foods. In addition to these foods, other "better for you" foods consumed include diet, light, reduced-cholesterol, reduced-sodium, caffeine-free, sugar-free, fortified, organic and low-carb varieties. The average American has at least two "better for you" products a day, according National Eating Trends, a study conducted by Port Washington, N.Y., research company NPD Group.

Healthy eating to consumers today tends to boil down to basic mathematics. For past generations, dieting was about subtracting bad things from your diet, but today healthy eating is more a matter of adding the good. More consumers are looking to add whole grains, dietary fiber, omega-3 fatty acids, antioxidants and probiotics, according to the NPD Dieting Monitor, which examines top-of-mind dieting and nutrition-related issues facing consumers. Awareness of these nutritional food elements continues to grow. In 2005, 36 percent of consumers surveyed said they were trying to get more omega-3 fatty acids in their diets, and the most recent NPD Dieting Monitor shows that number increasing to 46 percent.

The ongoing concern about health appears to be paying dividends. Recent U.S. government studies confirm obesity leveling off, and most recently, childhood obesity stabilizing. Even with concerns about the economic downturn, eating healthy still remains top-of-mind with consumers. According to a recent NPD Fast Check Survey on economic conditions, adults who identify themselves as financially worse-off compared to last year said that eating healthy still had the greatest impact on the food and beverages their household selects. Saving money ranked a close second.

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Individuals taking baby steps to reduce ecological footprints

Almost three-quarters (72 percent) of U.S. adults believe their personal actions are significant on the environment, while just over one in five adults (22 percent) believe their actions are not significant. Women are much more likely than men (77 percent versus 67 percent) to believe that their actions are significant. In fact, 35 percent of women believe their actions are very significant on the environment, compared to 21 percent of men who believe the same,

according to a survey conducted by Rochester, N.Y., research company Harris Interactive. Republicans are less likely to say their personal actions on the environment are significant (63 percent versus 78 percent for Democrats and 77 percent for Independents). More than half of U.S. adults have made changes in their lives that they believe will help sustain the environment. When it comes to making changes, Independents are the most likely to have done so (63 percent), followed by Democrats (57 percent) and Republicans (44 percent).

Although the phrase "environmental sustainability" appears to be popular, it may not be registering with all Americans. Fifty-eight percent say they have not heard the phrase "environmental sustainability" used, while 42 percent have heard it. Just under half of echo Boomers (those aged 18-31) and Gen-X consumers (those aged 32-43) have heard the phrase used (46 percent and 47 percent, respectively), while three in 10 matures (those aged 63 and older) have heard it used.

After assessing initial familiarity, Harris Interactive provided a definition of "environmental sustainability" (i.e., taking from the Earth only what it can provide indefinitely, thus leaving future generations as much as we have access to ourselves). In this case, just over half of Americans (53 percent) say they have done something to change their lifestyle to make it more environmentally sustainable, while one-quarter say they have not.

Education seems to play a role in whether people have made a change. Forty-six percent of those with a high-school education or less have changed their lifestyle, compared to 65 percent of those with a post-graduate degree.

Almost everyone who has made a change to their lifestyle is recycling (91 percent). Seventy-three percent are paying bills online and/or receiving paperless statements. Nearly half (49 percent) are buying more locally-produced food and/or goods, and many are buying green household products (47 percent) and installing resource-friendly appliances (46 percent). Some are no longer purchasing plastic water bottles (30 percent), commuting to work in ways other than by car (16 percent), carpooling (16 percent), changing light bulbs (4 percent) and buying hybrids (3 percent).

But not everyone is doing something to change their lifestyle. The top reason cited by 34 percent of those who have not changed their lifestyle is that they do not know what to do. Three in 10 say they haven't changed their lifestyle because it won't make any difference, followed by 22 percent who say they tend to forget until afterwards to do something differently. One in five (19 percent) have not done anything because it is too expensive, while one in 10 say they don't have the time.

Thinking about the future and the possibility of living a sustainable life, 67 percent of Americans say it will be possible for people to actually live an environmentally sustainable life, while 22 percent say it will not be possible. One thing to note is that just one in five say it definitely will be possible, while 47 percent believe it probably will be possible. While 64 percent of those with a high-school degree or less say it will be possible, 78 percent with a post-graduate degree believe the same. For more information visit www.harrisinteractive.com.

Red, white and blue lagging in going green

Consumers in Brazil and India tie for the highest Greendex score (which measures environmentally-sustainable consumption and behavior among consumers in 14 countries), at 60 points each, according to Greendex 2008, a worldwide tracking survey conducted by the National Geographic Society, Washington, D.C., and Toronto research company GlobeScan. Brazil and India are followed by consumers in China (56.1), Mexico (54.3), Hungary (53.2) and Russia (52.4). Among consumers in wealthy countries, those in Great Britain, Germany and Australia each have a Greendex score of 50.2. Those in Spain register a score of 50.0, and Japanese respondents 49.1. U.S. consumers have the lowest Greendex score, at 44.9. The other lowest-scoring consumers are Canadians with 48.5 and the French with 48.7.

Consumers in developing countries

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names of note

Echo Research, London, has appointed **Peter Hutton** and **Susan Walker** to the agency's advisory group.

San Francisco data collection company *Embarcadero Technologies Inc.* has hired **Gregory Jorgensen** as vice president, marketing.

MrWeb, a U.K.-based online publisher of marketing research news, has named **Chris Jensen** marketing executive.

SurveyGizmo, a Boulder, Colo., research company, has hired **Derek Scruggs** as partner and vice president, sales and business development.

G & S Research, Indianapolis, has appointed three new executives: **Jorge Rodriguez**, director, client services; **Alicia Moody**, graphics and reporting specialist; and **Stacia Murphy**, data specialist.

Palo Alto, Calif., research company *Frost & Sullivan* has hired **Maz Khan** as director of its pharmaceutical team in Australia.

Lightspeed Research, Basking Ridge, N.J., has made five European appointments. In London, **Javier Barra Flores** has joined as project manager and **Mark Thirlway** as account director, Europe. In Paris, **Jean-Hugues Rolland** has been appointed as account manager. In Germany, **Tom Meyritz** has joined as senior account director and **Laura Becker** as client coordinator.

Greensboro, N.C., research company *Quixote Group* has hired **Lindsey Blankenship** as account executive and **Nichole Alston** as assistant account executive.

Menlo Park, Calif., research company *Knowledge Networks* has named **Kurt A. Palmquist** vice president, client service.

Louisville, Ky., research and advertising company *thevimarcgroup* has appointed **Kirk Bastyr** to vice president and director, account services.

Bastyr

U.K.-based *Research Now* has appointed **Sebastien Croizard** as commercial director and **Marie Cheneval** as client development manager. Both Croizard and Cheneval will work out of the company's Paris office.

The Research Intelligence Group, Fort Washington, Pa., has hired **Susan Kohut** as vice president, account executive; **Karen Stuth** as senior vice president; and **Simon Jaworski** as vice president, account executive.

Charlotte, N.C., research company *Quaero* has named **Michelle Boockoff-Bajdek** vice president, marketing.

M/A/R/C Research, Irving, Texas, has promoted **Tony Amador** to senior vice president.

Stamford, Conn., research company *InsightExpress* has expanded its digital media measurement team and named **Lauren Coyne** director of agencies, East Coast; **Kyle Gollins** senior account executive, media and publishing, East Coast; and **Kathy Benigo** regional manager, Southwest.

InsightExpress has also made three appointments to its client service team: **Jeremy Hodgekinson-Price**, director; **Elizabeth Everett**, senior account manager; and **Jennifer Slott**, account manager.

Boston research company *Compete* has hired **Garrett Mullins** as vice president, sales and business development.

New York research company *Euro RSCG* has appointed **Phil Buehler** as chief market strategist.

London research company *Synovate U.K.* has appointed **Nigel Jackson** as head of its charities and transport industry sector team.

Princeton, N.J., research company *Consumer Health Sciences* has made four promotions: **Michael Fronstin** to COO; **Larry Weingarten**, executive vice president, research services and systems; **Deborah Freedman**, vice president, business development; and **Ariella Dugan** director, research services.

Double Helix, a London research company, has made three appointments to its U.S. team: **Pattie O'Donnell**, director and moderator; **Art McKee**, senior vice president; and **Hardoncourt "Trip" Trepagnier**, senior vice president, strategic quantitative research.

Research International, London, has hired **Bryan Luecke** as regional controller in Chicago.

San Francisco research company *Peanut Labs* has hired **Alison Morgan** as vice president, sales and technology solutions.

Audrey Zmuda has joined *Bovitz Research Group*, Encino, Calif., as research director/moderator.

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IRI offers two new services for CPG firms

Research firms TNS, Horsham, Pa., and Information Resources Inc. (IRI), Chicago, have partnered to help consumer packaged goods (CPG) and retail executives understand the green consumer. IRI intends to integrate TNS' Shades of Green segmentation methodology into IRI's Consumer Network Household Panel to monitor category and brand purchasing dynamics across green consumer segments. Shades of Green segments consumers by their attitudes and behavior toward environmental issues and motivation to purchase green products. IRI's Consumer Network Panel is a consumer panel that demographically reflects the U.S. consumer base and provides data on purchase patterns, product selections, trip missions and related shopping information.

The Consumer Network Panel is designed to enable marketers to track conversion rates and loyalty across green segments and gauge client reaction to featured green in-store marketing.

Separately, IRI has introduced new capabilities to its product cycle research, including panel-based virtual shopping, Web-based individual usage surveys, needs-state analytics, price monitoring and optimization and new applications of scanning technology. These capabilities are designed to identify fresh growth opportunities among high-potential consumers for CPG manufacturers and retailers. For more information visit www.infores.com.

Customer satisfaction benchmarking tool available for banks

Omaha, Neb., research company Customer Service Profiles LLC has completed more than 1,500 interviews with bank customers and credit union members across five national regions as part of its Customer Relationship Assessment product, which is designed to measure customer advocacy, loyalty and satisfaction, including key drivers of each. Further, the research is aimed at enabling financial institutions of all sizes to benchmark their report cards against competitors.

Scores encompass metrics of satisfaction, loyalty, advocacy and a variety of attributes related to the overall relationship. Additional statistical analysis identifies the drivers of loyalty and advocacy so that institutions can focus on the aspects of the relationship most responsible for predicting loyalty and advocacy. Detailed information on what is lacking when ratings are low is also provided. National study norms and benchmarks show how financial institutions are performing compared with national, regional and market competitors. For more information visit www.csprofiles.com.

ESRI offers four software updates

Redlands, Calif., geographic mapping software company ESRI has released ArcPad 7.1.1 and ArcPad Application Builder 7.1.1, the latest versions of ESRI's mobile geographic information system (GIS) software for field mapping and data collection.

Together with ArcPad Application Builder, the development and customization framework for ArcPad, version 7.1.1 is designed to improve the field data collection process and allow mobile users to make decisions quickly and accurately.

ArcPad provides mapping, GIS and GPS integration to users via handheld mobile devices. The software can be customized for specific field projects using ArcPad Application Builder. ArcPad software also integrates with ESRI desktop technologies, allowing field edits to be incorporated through disconnected editing.

Highlights of the ArcPad 7.1.1 release include a StreetMap desktop data extractor; performance improvements with StreetMap, including an increase in available memory while StreetMap is running; enhanced relational database support; and additional objects for Satellites property.

The ArcPad Application Builder 7.1.1 update will be shipped automatically to customers who are current on maintenance at no additional cost. Users who have already purchased ArcPad 7.1 are eligible to download a free upgrade to ArcPad 7.1.1 from the ArcPad Web site. Registration numbers for ArcPad 7.1 and ArcPad Application Builder 7.1 are valid for ArcPad 7.1.1 and ArcPad Application Builder 7.1.1, respectively. For more information visit www.esri.com/arcpad.

Additionally, small governments in the United States can now add ArcPad and ArcPad Application Builder to an existing or new small municipal and county government enterprise license agreement (ELA). The add-on offers unlimited access to ArcPad software for mobile (GIS) field mapping and data collection, as well as the development framework to customize ArcPad applications.

ESRI's small municipal and county government ELA program allows unlimited deployments of ESRI ArcGIS software and is available to municipalities and counties in the United States with populations of 100,000 or less. The program provides access to ESRI GIS technology with a tiered pricing schedule. For more information visit www.esri.com/smallgovela.

Separately, with the release of ArcGIS 9.3 support is available for Adobe Acrobat 9 software and new geospatial standards available in PDF. ESRI has collaborated with Adobe Systems Incorporated to improve workflow for GIS professionals using ArcGIS who wish to distribute maps in PDF. Recipients of PDF map documents can find and display a location in the file using x/y coordinates as well as measure

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News notes

Fairfield, Conn., research company **Survey Sampling International** (SSI) has fulfilled its commitment to donate up to $50,000 through a charitable campaign to support children and families devastated by the recent natural disasters in China and Myanmar. The money donated through SSI's In Our Thoughts Campaign for Asia supported the relief efforts by the Red Cross Society of China and the International Federation of Red Cross and Red Crescent Societies.

Opinion Research Corporation, Princeton, N.J., has adopted a new corporate logo, which will be used across all regions and divisions. The new logo features an updated representation of the company's business and will be phased in throughout the remainder of 2008.

Omaha, Neb., research company **infoGROUP** has unified two of its market research businesses, **Guideline** of New York and **Opinion Research Corporation** (ORC) of Princeton, N.J., under a single senior manager. Gerard Miodus, president of ORC, will assume responsibility for all Guideline operations in addition to those of ORC.

New York research company **Ziment** has modified its corporate image, which is reflected in a new logo, Web site and marketing materials.

New York research company **Gazelle Globalization Group**, part of Gazelle Global Research Services, has begun a rebranding initiative, including a new logo and Web site redesign.

A May 31, 2008 article by *New York Times* reporter Stephanie Clifford ("Billboards That Look Back") discussed out-of-home advertising and measurement technology. Clifford's article featured research companies such as **TruMedia**, Tampa, Fla., and touched on consumer privacy. TruMedia's CEO, George Murphy, issued a response via a short letter to *The New York Times*, saying that TruMedia's privacy policy states that "we do not and will never engage in any video recording and that the data we collect is anonymous and will only be reported in the aggregate. No individually identifiable data is ever collected. Images from our sensors are processed and converted in real-time into counts (how many) and durations (how long). Using complex proprietary algorithms these counts are further assigned to specific demographic categories such as gender and age-group. No images are ever and will ever be stored for use, review or sharing with any private or governmental body."

Calendar of Events August-November

IIR will host its Scope 2008 event, focused on segmentation, on August 18-20 at the Hilton La Jolla, Torrey Pines Hotel, in La Jolla, Calif. For more information visit www.iirusa.com/scope. Register with code XM2045Quirks to save 15 percent off standard rates.

Aberdeen Group will hold its annual chief marketing officer summit, themed "Best-in-Class Marketing," on September 4-5 at the Westin Hotel in San Francisco. For more information visit www.aberdeen.com/events/live/CMO08.

The American Marketing Association will hold its annual marketing research conference on September 14-17 in Boston. For more information visit www.marketingpower.com/research.

The Australian Market & Social Research Society Limited will hold its national conference on September 14-16 at the Melbourne Exhibition and Conference Centre in Melbourne, Australia. For more information visit www.amsrs.com.au.

ESOMAR will hold its annual congress on September 22-25 in Montreal. For more information visit www.esomar.org.

IIR will hold its annual market research event on October 13-16 at Disneyland Hotel in Anaheim, Calif. For more information visit www.iir-usa.com. Quirk's subscribers save 15 percent off standard rates with code XM-2028QuirksWeb.

The Council of American Survey Research Organizations will hold its annual conference on October 15-17 in Palm Beach, Fla. For more information visit www.casro.org.

Frost & Sullivan will hold one of its Executive MindXchange conferences, themed "The People, Processes and Technologies Delivering Customer Satisfaction, Retention, Loyalty and Growth," on October 19-22 at the West Coast Resort. For more information visit www.frost.com.

PMRG will hold the second annual meeting of The PMRG Institute on October 19-21 at the Sheraton Philadelphia City Center Hotel. For more information visit www.pmrg.org.

The Latin Force Group will hold its annual multicultural marketing summit on October 22-24 at the Mandarin Oriental Hotel in Miami. For more information visit www.latinforce.net/summit.

The Marketing Research Association will hold its annual fall education conference on November 3-5 in Las Vegas. For more information visit www.mra-net.org.

IIR will hold its research industry summit, themed "Solutions that Deliver Quality," on November 6-7 at the Marriott Downtown Chicago in Chicago. For more information visit www.iirusa.com.

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

Acquisitions/transactions

Reston, Va., research company **comScore Inc.** has acquired **M:Metrics Inc.**, a New York mobile measurement firm. The transaction involved a cash payment of $44.3 million. M:Metrics offers three primary measurement products: MobiLens, MeterDirect and M:Ad, which are fully available to

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By Michael Latta, Mark Mitchell, Albert J. Taylor and Charles Thrash

Using online software to train the next generation of Web surveyors

Business schools throughout the country have been seeking endorsement by the Association to Advance Collegiate Schools of Business International (AACSB) by providing business students with active learning opportunities such as doing online research projects that enhance their business skill set.

According to a study by Segal and Hershberger (2006), the most desired types of background and training that marketing research recruiters require for job candidates are marketing research experience (45.2 percent), industry-specific experience (32.4 percent), quantitative research and analysis experience (19.8 percent), and software-specific experience (15.2 percent).

To give students experience in those areas, Coastal Carolina University provides training in conducting online e-mail surveys.

AACSB International is the oldest and largest accrediting body for business schools that offer undergraduate, master's and doctoral degrees in business and accounting. To maintain its AACSB accreditation, the Wall College of Business at Coastal Carolina University is constantly seeking ways of improving teaching and research programs, especially those that provide opportunity to achieve excellence through active learning for students.

Coastal Carolina University sought participation in the academic grant program of WebSurveyor (now Vovici), an online survey research tool. This program allows colleges and universities to receive a renewable two-year grant, with a commercial value of $50,000, to use Vovici software to support teaching and research efforts. Other research software vendors also have academic grant programs and contribute to the training of young research professionals.

WebSurveyor was integrated into four courses in the Wall College of Business, including principles of marketing, marketing strategy, retail management and tourism research. The process involved non-profit organizations (local thrift stores and the South Carolina Chapter of the Red Cross), the Myrtle Beach Area Chamber of Commerce and Class A PGA members in the Myrtle Beach area.

Editor's note: The authors all work within the E. Craig Wall Sr. College of Business Administration, Coastal Carolina University, Conway, S.C. Latta is an assistant professor, Mitchell is chair and Taylor is an associate professor in the department of management, marketing and law. Thrash is director of the school's professional golf management program. They can be reached at mlatta@coastal.edu, mmitchell@coastal.edu, ataylor@coastal.edu or cthrash@coastal.edu.

Excellent example

The Class A PGA members survey provides an excellent example of best practices involved in e-mail survey methodology that the new marketing research professionals need to understand.

The best practices involved include:

1. Making the questions easy to understand and answer.


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2. Measuring the relevant concepts such as importance and performance.

3. Asking appropriate demographic questions.

4. Having a relevant e-mail list.

5. Having a short and effective invitation.

6. Sending the e-mail invitation at an effective time.

7. Using follow-ups as necessary.

Faculty handled items 1-4 above and utilized WebSurveyor to create the survey instrument. The e-mail list came from the PGA and thus was relatively fresh and accurate. Items 5, 6 and 7 were handled by the students after instruction from faculty.

Response rates are typically high for Web surveys compared to other methodologies, with around 50 percent of responses coming within one day of e-mailing the invitations. The majority of responses come within four days.

It is a best practice to send e-mail invitations on Monday evening so they are received by the potential respondents Tuesday morning and do not remain unopened over a weekend. Also, it is important to have an inviting subject line that does not appear to be spam to encourage the respondent to open the invitation. Finally, if possible, it is helpful to have an endorsement from a relevant source to encourage cooperation.

Not optimal

With a class of students involved, control over the survey process is not optimal and not all of these best practices were implemented by all students participating in the survey fielding process.

There were 72 students in two retail management classes who participated in the PGA Web survey. Each student had a list of approximately 20 PGA members to contact through e-mail. The first round of e-mail invitations produced 60 responses from PGA members. The second round of invitations included an endorsement letter from the secretary of the Carolinas Section of the PGA. In addition a specific subject line was provided which said, "A Message From Karl Kimball, Secretary of the Carolinas Section of the PGA." Students were also required to carbon-copy the retail management professor on all outgoing e-mails to keep track of their efforts so they could receive course credit and so the PGA respondents could receive a summary of the results after the responses were analyzed. The final sample size was 107.

Retain control

Using a program such as WebSurveyor in active learning requires faculty (or the survey manager) to retain control of the survey field process to ensure that e-mail invitations are sent out in a timely fashion, have an appropriate and inviting subject line and include an endorsement by an appropriate source, and offer an incentive for participation in the form of a summary of the results (Goodman, 2006).

With the above issues properly managed, broad use of an online survey vehicle in active learning research projects in support of developing marketing strategies and tactics is recommended by implementing the following 10 best practices for e-mail surveying:

1. Indicate you have permission to use the respondent's e-mail address to gain cooperation and prevent opting-out and insuring compliance with the CAN-SPAM Act.

2. The subject line should be inviting and suggest the value of reading the e-mail.

3. The from line should indicate an organization or individual that is recognizable to the respondent.

4. If possible, test-run your e-mail through a spam checker to see if it triggers filters.

5. Make sure your content is relevant to the respondent and not just you or your survey.

6. Include a "call to action" in the e-mail to encourage participation and indicate what the value of participation includes.

7. Do not cram too much into your survey; if it takes more than five minutes to complete, early termination is likely.

8. Use common response formats to make participation easy.

9. Remember that permission is perishable and getting to the point is essential in the content of the invitation e-mail and the survey itself.

10. Think win-win-win for the student, the respondent, and the business community in designing the e-mail survey from start to finish.

Successful entry

Following these 10 best practices will give students marketing research experience along with specific software experience and in some cases provide industry-specific experience (in this case, golf) as well as quantitative research experience, thereby helping to prepare them for a successful entry into the business world. | Q

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Catch the bad guys

Enter article ID 20071107 at www.quirks.com/articles to see how Maritz Research and e-Rewards track down and eliminate fraudulent respondents.

> data use

By Bob Gerstley

The insidious top-box and its effects on measuring line share

For companies offering more than one product in a category, market share gain and line share gain are synonymous. Self-evident as this may be, we still see widespread use of marketing research tools that either disregard or ineffectively deal with line share and product interaction. This suggests that many brands are not realizing their full potential, and many growth opportunities are being squandered.

To the extent that growing line share is a business objective, perhaps the most insidious and most dangerous research tool is the "top box" measure of purchase intent. In top-box, respondents view products and check boxes or circle numbers on scales that typically range from "definitely will buy" to "definitely will not buy."

Top-box is insidious because everything about it seems logical and intuitive - what could possibly be wrong with asking people if they will buy your product? Top-box is dangerous because it easily misleads the marketer with data that may be statistically significant but answers an irrelevant business question. Similarly, TURF and product gap analyses identify product opportunities that many marketers presume will minimize cannibalization. In fact, this is not always the case. Let's examine each of these approaches in turn - and then explore an alternative that better addresses the central business issue.

Suppose for a minute that consumers had unlimited budgets and an infinite appetite for products. If this were the case, releasing new products would always increase sales and category size. People would buy anything and everything they wanted, and top-box measures of desirability (purchase intent) would reliably estimate relative product potential. "I probably would buy" would mean just that! Products with higher purchase intent scores would sell more than products with lower purchase intent scores and line share would increase ad infinitum.

Limited by budgets

In our world, however, people are limited by budgets and by how much they are willing to consume. Choosing more of one product typically means choosing less of another. Whether we are modifying existing products or releasing new ones, the central business question is, "How will the changes we introduce affect choices people make within the category?"

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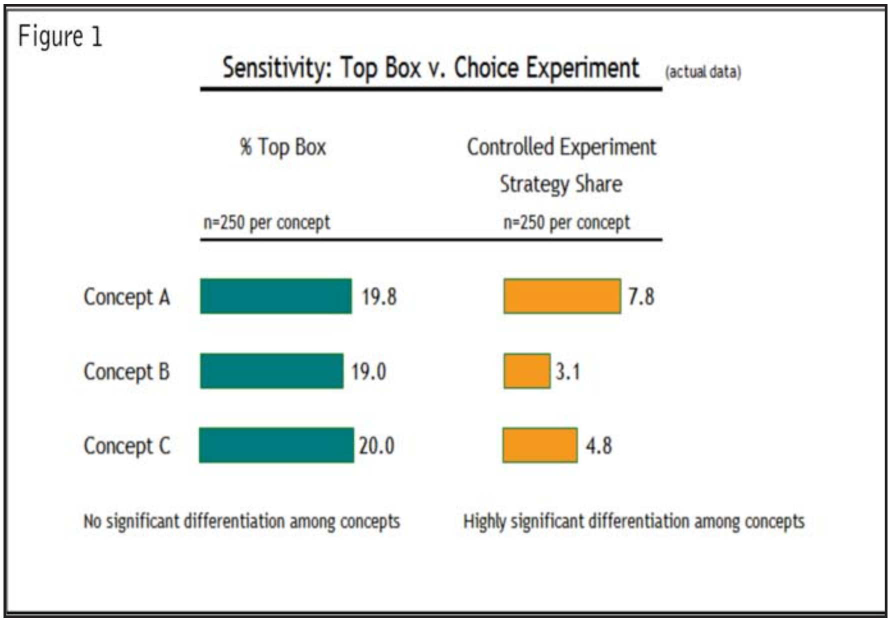
Suppose you conduct a top-box test on two line extensions: "Grape" and "Lemon." Grape scores higher than Lemon, indicating that people are more likely to buy it. Will Grape increase your line share the most? Suppose that Grape earns much of its share from one or more of your other products while Lemon earns most of its share from competitors. The top-box information is technically correct (Grape is more desirable than Lemon) but also misleading (Lemon is the better business decision).

Moreover, application of statistical formulas can make top-box data seem robust despite its lack of relevance. Sometimes top-box will produce the right answer, but only by luck. When it produces the wrong answer, you usually won't know it - and



your revenue and profit will be lower than they could be.

Inflated results

Another fundamental weakness of top-box is evidenced by how results are interpreted. It is common knowledge that top-box consistently delivers inflated results. To compensate for this, marketers apply norms to adjust the data. Restating this in accurate but less-friendly terms, top-box is a weak measurement that is known to deliver inaccurate results that must immediately be corrected. The typical correction involves application of factors based on historical data which may or may not be relevant to your product and the current market.

Many marketers have become so accustomed to norms that they don't view them as a red flag. Do we apply norms when we look at our speedometer to figure out how fast we are going? Do we apply norms to the thermometer reading when we want to know the temperature? If the criterion we measure is relevant to the business issue and the measurement instrument is valid, norms should not be necessary at all. Put simply, top-box requires norms because it doesn't measure the right thing. Top-box measures desirability, not choice. Overstatement results from the fact that people desire many things but only buy a subset of what they desire.

The very real problem that top-box doesn't measure what businesses are most interested in is compounded by its general lack of sensitivity. Because it offers few ways to express desirability (definitely will buy, probably will buy, etc.), top-box has difficulty differentiating among similar concepts. Since one of marketing's primary goals is identifying which products will sell the most, this is by no means a minor problem. Top-box is useful for preventing disaster, but its ability to maximize success is limited (Figure 1).

Some marketers recognize that top-box has limitations, but believe that TURF analysis can be used in conjunction with it to minimize cannibalization and identify products likely to grow line share. In TURF, top-box or other desirability ratings are collected on multiple products and then examined for overlap. It is presumed that product sets in which the largest number of respondents have rated something highly will maximize line share.

TURF, however, is simply another way of analyzing desirability data. All the aforementioned problems with top-box (or similar scales) remain. Purchase intent scores in a TURF study still lack sensitivity, and the measurement still overstates potential because it captures desirability, not choice. Common sense dictates that if the primary data on which a model is built is weak, strategic conclusions are likely to be weak as well. This does not mean that TURF has no application. Products that are undesirable will sink low enough in a top-box measurement that they will usually be ruled out. Further, "big" interactions can be detected even when measurements lack sensitivity. What does this mean for a business? TURF can help the marketer avoid big mistakes and, in the rare instances that they occur, readily identify groundbreaking opportunities. TURF is less capable of effectively discriminating among the more typical strategy enhancements that move businesses forward incrementally.

Explore cannibalization

Another commonly-used approach involves the integration of top-box data with responses to add-on questions designed to explore cannibalization. As we've already seen, top-box addresses the central business issue tangentially at best. Additional responses to questions about uniqueness, substitutability or originality provide only anecdotal information since respondents are not making choices among real products as they do in the real world. Researchers are then left with two weak data sets that answer different questions and must somehow be glued together with analytical assumptions. It is no surprise that many marketers have found this solution to be only marginally effective at predicting cannibalization and hence, overall impact on the business.

Product gap analysis is also commonly used to uncover significant holes in a category. Typically, this involves mapping competing products on several dimensions and looking for uncharted territory. The logic in favor of product gap analysis goes something like this: "If there are no other products like it in the category and if I don't make anything like it, it's likely to grow my line." This logic is flawed. Regardless of its uniqueness, any product filling a gap in the market will necessarily appeal to some cluster of people. Is it reasonable to assume that these people will not share tastes for other products? What if they share a taste for another product made by your company? Digging just below the surface it becomes immediately clear that identifying market gaps (potential product opportunities) and quantifying cannibalization are two very different things. Gap analysis may identify a product that will grow your line share - but then, it may not. As with top-box, if you happen upon the best answer, it's probably by chance.

We should also be wary of pre-post tests when it comes to optimizing line share. Pre-post tests have been falling out of favor but still warrant discussion. In the pre-post test, respondents are presented with a

Figure 2

Illustrative Output from a Choice Experiment

	Strategy Shares (Simulated Market Shares)		
	Current Products	Add Line Extension A	Add Line Extension B
Your New Line Extension	N/A	6.3	5.7
Your Current Product	23.6	18.2	22.1
Your Line Share	23.6	24.5	27.8
Competitor A	30.7	30.2	28.4
Competitor B	24.3	23.9	22.7
Competitor C	21.4	21.4	21.1
Competitor Total	76.4	75.5	72.2
Overall Total	100%	100%	100%

Line Extension A is more desirable than B (6.3 versus 5.7 share points) but when examined in product line context, Line Extension B is the better business decision (27.8 versus 24.5 line share points)

competitive product array and asked to choose products. Following this, they are shown a different product array in which a new or changed product has been introduced and are asked to reallocate their choices. Implicitly, the researcher has said, "Here is something new…I expect you to do something different." Eager to please, many respondents will do exactly what you've asked of them, delivering exaggerated results and setting unrealistic expectations.

Competitive context

The good news is that science can be implemented in marketing through choice experiments. In such experiments, choices are elicited in a competitive context. Note the important difference between measuring and modeling choice. By definition, models are weaker than measurements. In fact, models are generally designed to simulate measurements.

To illustrate, if you want to know the outside temperature, a model might have you look out the window and count the number of people wearing hats, coats, gloves, sweaters, etc. The data would be plugged into a formula and the output would estimate the temperature. By contrast, a measured approach would have you simply open the window and place a thermometer outside.

Choice experiments are measured approaches that predict market behavior more accurately than modeled approaches such as conjoint analyses or discrete choice. To estimate product potential and line-share implications, choice experiments are conducted as follows:

- Divide a sample into randomly equivalent groups.

- Expose a control group to the relevant set of current, competing products including those you currently offer. Do not include your test product as the control group is your benchmark.

- Expose each test group to the identical array of current products plus one version of your test product. Do not single out test products in any way; respondents should not be able to identify the test product or the variables under scrutiny.

- Test different prices, packages, concepts, positions by systematically varying the test product from group to group - while holding all competitive products and information constant.

- Rather than asking respondents to indicate what they like or what they think they might buy, have them allocate choices across the product array, such that any product can receive part or all of a respondent's choice.

- Hold secondary marketing variables (shelf placement, couponing, etc.) constant. Having the right products on the shelf will always be the larger contributor to product-line growth, revenue and profit. Introducing too many marketing variables into a study is a common mistake and a sure-fire way to dilute or invalidate findings!

- In each group, the test product and all competing products will earn a strategy share. If the measurement system is valid, these strategy shares will accurately reflect market share potential, holding distribution and awareness constant. Test product(s) potential and cannibalization (source-of-business) are clearly evident when comparing the control group to test groups.

Studies conducted in this way have several benefits. Compared to top-box, they more accurately differentiate among similar concepts because a more sensitive measure is used. They directly measure cannibalization because choices are elicited in a competitive context. Overall impact on the business is much easier to assess. Figure 2 shows exactly what you get from such a study. In this example, line extension A is more desirable than line extension B. In product-line context, however, line extension B clearly represents the better business decision! Source-of-business and cannibalization are unambiguous.

Readers educated in hard sciences may interpret the recommended experimental approach as an application of the scientific method - they would be correct. In the hard sciences, scientific method is generally regarded as the only reliable way to establish cause (if I do…) and effect (consumers will…).

Impact consumer choice

Marketers generally want to know how their decisions will impact consumer choice in the marketplace. If we accept the idea that measuring consumer choice is therefore more relevant than measuring desirability, and if we accept that controlled experiments - the cornerstone of the hard sciences - is a reasonable way of establishing cause and effect, a world of possibilities opens up for marketers.

An important concept in science is that controlled experiments do not care which variable is being manipulated. In a drug experiment for example, each experimental group may vary based on: the medication administered (Is the new drug more effective than the old drug?); the dosage (What is the optimal amount to administer?); the age of the patient (Who responds better?); the length a patient has suffered from an illness; etc.

By extension, choice experiments do not care which elements of the marketing mix are being manipulated. Each respondent group may be exposed to a different: concept (Which will sell the most?); price (to build a price demand curve); feature (Which feature/flavor/color, etc., sells the most?); product claim (Which benefits sell the product best?); ad (Which induces more people to buy?); packaging; etc.

Conceptually weak

The notion that different research methods must be used to study different marketing variables is conceptually weak and severely limits the marketer's ability to make sound business decisions. There is tremendous value in the ability to make apples-to-apples comparisons of strategies across elements of the marketing mix.

In addition to using choice experiments to more effectively study one element of the marketing mix, choice experiments can be used to compare diverse strategies such as: adding a new feature versus adding a line extension; changing price versus changing packaging; bringing two versus three line extensions to market, and so on. Results estimate the market share potential for each strategy, using the same method and the same criterion.

So what are some of the reasons behind the popularity of tools that weakly (and often incorrectly) quantify cannibalization, fail to properly differentiate among similar concepts, and use measurements that don't capture the right information?

History. Companies often do what they have always done because it is the path of least resistance.

Perceived risk. Managers sometimes focus on the risk and visibility associated with championing a new idea rather than return on investment and growth potential for the company.

Misunderstanding central business issues. Managers may think that top-box works sufficiently well because it helps generate reasonable volume projections. But estimating volume within +/-10 to 15 percent (that's a 20-30 percent range!) does not mean that you've introduced the best product, nor does it mean that you've minimized cannibalization - and the latter two are likely to be the bigger contributors to revenue and profit.

Worth re-thinking

Since one of the most powerful ways to grow a business is to gain a better understanding of product interactions and thereby increase line share, the tools used to accomplish this may be worth re-thinking. |Q

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By Sarah Browne

green research/the business of research

Gathering data, protecting the planet

How to green your research

It's 1999. I'm in Phoenix on the first leg of our three-cities-in-three-days research trip, waiting for the rest of our six-member team to arrive at the focus group facility. Each rushes in, picks up a stack of discussion guides and sits down to watch. Lunch and dinner are delivered in Styrofoam containers. Later, I have my choice of Explorers and other SUVs to transport me back to the hotel.

The next day, we get up at dawn, fly to Chicago and follow the same drill. More hotel rooms, more cars, more discussion guides, more delivered meals. Then we head to Boston and do it all again. On Friday all six of us fly thousands of miles back to the West Coast.

Two weeks later, FedEx delivers my 15-pound research report to team members in several different cities. A week after that, I fly to these cities to present the study's findings. Or they fly to me.

Sound familiar? Can you guess our environmental footprint for this single trip? Can you guess how many pounds of CO^2 we burned? How many gallons of gas? Or barrels of oil?

Using the carbon footprint calculator created by San Francisco-based greenhouse gas-reduction company TerraPass, I calculated our carbon footprint for the air travel, hotel and automobile usage for this single project:

Air travel: 24 flights (six team members x direct flights to three cities and back)
Hotel: 24 rooms
Cars: 12 cars (four x three cities)

Carbon emissions burned during one research trip: 17,538 pounds of CO^2, created by burning 901.42 gallons of gas or 46 barrels of oil

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Thanks to new tools, technologies and a fresh green perspective, today we all know better. The writing is on the wall - and in our air, our oceans, our mountains and our cities. No longer should we rush naively ahead without considering sustainable practices for our businesses, our clients and our personal lives. Going green these days goes far beyond being good for our collective consciences; it's also good for business. As research companies, we can actively take steps and create strategies to leave a lighter environmental footprint in the course of our data-gathering and invite our forward-thinking clients to join us.

Rather than giving in to the urge to atone for our decades of eco-sins by switching to hemp, let's instead take a look at some tangible, effective and easy ways we can green the many facets of our market research.

Biggest environmental impact

If there is one place to start shifting from carbon-black to kelly green, it's air travel. Adam Stein of TerraPass reports that, "Flying is probably your company's biggest environmental impact, with business travel responsible for some 18 percent of carbon emissions worldwide."

Agroforestry resource center Trees for the Future, Silver Spring, Md., - which, since 1989 has operated a tree donation program - notes that: A typical jet emits roughly one pound of carbon dioxide for each passenger-mile it travels. A round-trip between New York and Los Angeles creates about three tons of CO^2 per passenger - 400 tons or more for a typical, fully-loaded 737 aircraft.

When you consider that in an average year U.S. business travelers flew some 240 billion passenger-miles, according to data from the National Business Travel Association, we're talking about planting a lot of donated Moringa "miracle trees" to zero-out those emissions.

These numbers don't take into account private jets. For example, a Gulfstream 5 emits as much in one cross-country trip as one driver does in a year.

In fact, according to enviro-industry news source Greenbiz.com: "One of the dirty little secrets of business conferences, even eco-friendly ones, is that the environmental impacts of participants often negate any benefits resulting from the gathering itself." The impacts come principally from the fuel used by planes, trains and automobiles, and from the solid waste and other emissions associated with the $175 billion business travel industry.

But even in these tumultuous travel times, there is a glimmer of green at the end of the tunnel. Some airlines have started taking responsibility by offering carbon offset programs to customers, recycling

How to green a research facility

How green are your favorite facilities? Before you book, ask. You may be surprised by all that the facilities, and their employees, are doing to create a greener research experience. For example, Candice Morrissey, qualitative manager at Luth Research in San Diego, reports that requests for information on what the company is doing to be green have increased dramatically since the beginning of this year.

Recycling is hot topic #1, surfacing so much that Luth actually instituted an interdepartmental paper reduction challenge, which employees are enthusiastically tackling. Not only does an effort like this unite the staff as social innovators, it allows a wide range of employees to voice, act and be aligned on their values. At Luth, the company maintenance manager is actually serving as change agent, suggesting the switch to biodegradable detergents and recycled paper goods. Bottles and cans are recycled and donated to a local Girl Scout troop.

Luth has even actively sought out organic restaurants, which, beyond satisfying client palates and buy-local mantras, also reduces packaging waste like Styrofoam. "One restaurant delivered the food on hemp plates," says Morrissey, "along with a great, no-guilt dinner."

Other areas that are ripe for greening:

• Swag. Facilities and swag go hand in hand. How many logo-bearing tchotchkes like pens, Post-it Note pads, key chains or foam toys have you squirreled away in a drawer - or worse, dropped in the trash?

Today, thankfully, there's sustainable swag. At the recent Sustainable Brands 2008 Conference held in Monterey, Calif., a San Francisco company called Eco Imprints presented more than 100 eco-friendlier promotional products. On display was a host of items: vegetable-based bio-plastic name badges; recycled lanyards; 100-percent recycled laptop bags; eco-apparel made of hemp, organic cotton, bamboo blends and soy protein fibers; seeded paper goods; reusable water bottles; and desktop goodies made from corn.

• Ask the facility to avoid using disposable items like plastic or paper coffee cups. In 2006, the number of coffee cups used by Starbucks topped 2.3 billion, which equaled some 944,211 trees cut down, 36 million pounds of solid waste created and 569 million gallons of water wasted.

• Skip the bottled water. According to Web site FilterForGood.com, Americans send about 38 billion water bottles a year to landfills. Considering the 1.5 million barrels of oil needed to make those bottles, the environmental impact of plastic bottle waste is truly staggering. The site, sponsored by Brita and Nalgene, suggests filtered water plus a reusable bottle as a greener solution.

• Ask for local food choices, including sustainable seafood and fair trade coffee. Check out the Monterey Bay Aquarium's Seafood Watch guide on sustainable seafood. Even better: it's now available in a new mobile "online pocket guide" format.

• See if the facility can donate leftover respondent or client food to local programs such as Food Runners.

• Ensure the facility offers in-room recycling of plastic, paper and bottles.

• Eliminate handouts. Offer information online, including profiles, discussion guides and contracts.

• Ask the facility for green hotel and car rental recommendations. A discount would be nice, too.

cabin waste, investing in alternative fuel research and optimizing flight routes. One of the simplest things we can do as road-warrior researchers is to be part of the solution by offsetting the carbon from our flights and supporting those companies who share our green goals.

Here are several easy ways to green your business travel:

- **Fly direct if possible**. The greatest emissions are at takeoff. And fly coach. Sorry! But less service means less waste.

- **Reduce excess baggage**. Now that many airlines are charging for even the first piece of luggage, this makes financial sense, too.

- **Combine trips**. Can you do stage-one fieldwork on the way to a conference? Or complete stage two on the way back?

- **Book your flights on a greener airline**. Airlines such as British Airways and Southwest are making an effort to be if not do-good-green, at least greener. Virgin Atlantic has experimented with biofuels. In February, one of its Boeing 747-400's flew from London to Amsterdam carrying in one of its four fuel tanks a 20-percent mix of biofuel derived from coconut and babassu oil. That may not sound like much, and the green-bashers went ballistic, but it is the first time a commercial aircraft has flown any distance using renewable energy.

- **Use buses, trains or shuttles to the airport and hotels**.

- **Consider alternative forms of travel such as a train or ferry**. Traveling by rail contributes less per passenger mile to greenhouse gas emissions than either cars or airplanes. According to U.S. Department of Energy data, that makes Amtrak 17 percent more efficient than domestic airline travel and 21 percent more efficient than auto travel on a per-passenger-mile basis. In fact, passenger railroads emit only a miniscule 0.2 percent of the travel industry's total greenhouse gases. No surprise then that even in Europe, where a superior rail system has long been fully embraced, travel by train has been sharply up since 2006.

- **Stay at a hotel near the facility, near the client**. Walk.

- **Rent a fuel-efficient car**. Always choose the smallest car for your needs. Green driving doesn't have to stop when you leave your Prius in the driveway. Between outrageous gas prices and the increasing availability of hybrids and fuel-efficient cars, today it makes more sense to tap into green programs like those created by Enterprise and Hertz. Both companies are offering more choices, and Enterprise has launched a carbon offset program for customers.

- **Stay at a green (or greener) hotel**. With more than 2.6 million hotel rooms rented in the United States daily - and with the average hotel purchasing more products in one week than 100 families typically buy in one year, staying sustainable should be a top priority. Green lodging choices use renewable resources when possible, make good use of nonrenewable resources and are committed to reusing and recycling.

The good news is that hotels around the globe are becoming increasingly green, even eco-chic and business-friendly, while balancing environmental protection and social responsibility. Chains such as Marriott, Kimpton, Fairmont and Sheraton plus countless independents have aggressively reduced energy use and costs through the use of compact fluorescent light bulbs, water-saving devices like dual-flushing toilets and even energy-control guest cards. Some have switched to more eco-friendly TVs with LCD technology, which can be up to a third more efficient than plasma TVs. Nearly every property posts cards in bathrooms, allowing us to choose to use fewer towels or sheet changes.

For 24/7 idea generators, InterContinental Hotels Group is going even farther, inviting customers to participate in its innovation hotel project. Brainstormers may want to contribute ideas, suggestions or feedback on how the company can create more sustainable hotels.

Sustainable travel experts are now compiling and rating hotels, motels and other lodging based on greenability. Look for travel Web site Expedia's new Global Baseline for Sustainable Tourism Criteria list, coming in October 2008.

Washington, D.C.-based environmental certification organization Green Seal has partnered with Green Globe, an environmental awareness project of the World Travel and Tourism Council, to certify U.S. hotels. Hotels that meet the standards can display both the Green Seal and Green Globe logos.

- **Be a green travel evangelist for your clients**. Make a list of green hotels for your clients and colleagues to use when planning a project trip. Toronto-based Fairmont Hotels & Resorts now uses wind power for check-in computers. This switch will result in a greenhouse gas reduction of almost 100 tons over the next year. The luxe hotel group Leading Hotels of the World, New York, has created its Leading Green Initiative which works in tandem with Sustainable Travel International of Boulder, Colo., to let you carbon-offset your hotel room.

- **Be a good green hotel guest, whether you're in a green hotel or not**. Ask the staff not to change your sheets and towels every day. Whenever you leave your room, turn off all energy sources: the lights, radio, TV, and heating/cooling. Close the drapes. Participate in any recycling efforts the hotel promotes.

  If the hotel provides complimentary newspapers, pass them along to someone else when you're done or ask management whether they can be recycled. Don't let the water run while brushing your teeth; take short showers. If you use the hotel fitness center, turn off exercise machines, saunas and other equipment when you are done. If the hotel already embraces green-hotel practices, thank the managers and employees and tell them you appreciate it.

  For extra green points, travel with your own mini nightlight to avoid leaving lights on all night. Bring your own mug with you rather than relying on in-room disposables.

- **Participate in a carbon-offset program designed to counterbalance the effects of your travel**. For example, working with partner Expedia, TerraPass has created carbon offset bundles based on the distance you plan to fly - short, cross-country and international - to fund clean energy and carbon reduction projects. When you book your flight on Expedia, you simply add TerraPass carbon offsets.

Green your work life

Once you're back on the job, here are 10 easy ways to green your work life:

1. Optimize the energy settings on your computer. Learn to love power strips. Computers are sneaky. "Standby" settings will continue to use power even when they're not being used. So first, optimize your energy settings. Then either turn off the power strip or pull the plug when you're done for the night.

2. Digitize anything and everything. We're still using way too much paper. Europeans and Americans use six times as much paper as the world average. The paper industry's total carbon footprint is estimated to be three times higher than the aviation industry. On Greenbiz.com, the European Environmental Paper Network's Mandy Haggith said: "We are all very upset about the impact of people flying everywhere, but most of us haven't calculated the impact of something like paper which we use every day."

The European Environmental Paper Network's newly launched Shrink campaign, which "addresses the madness of over-consumption of paper," is working with 20 major European companies to help them reduce the amount of paper they are using. The site offers tips and tricks such as changing default margins, reducing font size and images or even using thinner paper. Shrink gives this example: By reducing the basis weight of ATM receipt paper, the Bank of America saved an estimated $500,000 each year, plus the added savings by cutting storage, handling and transportation and labor costs.

I added a signature line to my e-mails - "Before printing this e-mail, please consider the environment" - and was delighted to notice the line popping up on friends' and colleagues' e-mails a few days later. When you do use paper, look for a recycled paper with a high percentage of post-consumer content and the minimum of chlorine bleaching. Print on both sides of the paper. When shipping, re-use boxes and use shredded wastepaper, never Styrofoam popcorn. Find a greener office-machine provider, who will guide you through the new world of eco-friendly inks and carbon-neutral paper.

3. Green your commute. Too many of us are spending the average of 47 hours a year commuting in hellish rush-hour traffic. This adds up to 3.7 billion hours and 23 billion gallons of gas wasted in traffic each year. Not fun ever, but certainly less so with gas prices hovering at $4 per gallon. Investigate alternatives like carpooling, mass transit, company shuttles (thank you, Google and Yahoo) and the car-sharing service, Zipcar.

4. Work from home. Ten years ago, when I worked with Microsoft on its collaboration and communication tools, working from home - telecommuting - was virtually synonymous with calling in sick. Today, some 44 million Americans telecommute, and with the current gas prices, undoubtedly another couple million have joined this no longer-exclusive club. With instant messaging, video-conferencing and other innovative tools, shouldn't working in your pajamas be in your future?

5. Use green materials. OfficeMax stores now feature TerraCycle's innovative products fashioned from waste-stream materials like juice packages, plastic bottles and e-waste.

6. Green-design your workspace. Unclutter. Reclaim.

7. Green your lunch. Watch out for waste. Take-out equals mountain of packaging waste. Avoid disposable plates, napkins and utensils. Order and serve fair trade coffee.

8. Use green vendors and businesses. Companies from printers to designers to mechanics are going green these days, especially now that many counties are starting certification programs. We have one where I live in Monterey County which provides resources, strategies, audits and planning, along with the growing list of certified green businesses.

9. Green your company's policies and practices. A recent Yale study of 1,000 adults indicated that 75 percent of Americans realize their own behavior can help reduce global warming, while an even more encouraging 81 percent believe it is their responsibility to do something about it. The study also found that an increasing number of Americans are expecting the business sector to play a strong role in tackling this issue.

Change courses are cropping up everywhere these days, from grassroots organizations like Freecycle.com to more comprehensive programs like the Cool Corporate Citizen Program. Developed by the Empowerment Institute, this three-part plan has helped more than 250,000 people reduce their environmental footprint by 25 percent and trained dozens of communities to implement this methodology.

10. Increase your use of digital tools. Where appropriate for your research project's strategy, consider electronic technologies and methodologies rather than relying solely on face-to-face fieldwork.

Big stick

In the year 2008, we're all pretty much operating on the honor system. With the exception of bans on plastic bags and Styrofoam bans, no one is wielding the big stick when it comes to the three Rs: reduce, reuse, recycle. But expect that fourth R - regulation - to show up soon. Corporate meeting planners and travel departments are already under new scrutiny and are scouring the world for Leadership in Energy and Environmental Design-certified destinations and conference centers. How soon will our clients require us to book only green research facilities, stay at green hotels and reimburse us only for fuel-efficient cars? When will we be told to zero out our travel or stay home?

Thankfully, every day we have an ever shinier toolkit of technological innovations to digitally speed us through the shifting research-scape as it takes on a greener hue. From WebEx to Ning to Kluster to AskSunday to Workamajig, Issuu and even the oddly trendy Twitter and Tumblr, there is no shortage of effective online solutions to aid in our quest to green our research and our planet. | Q green research

Looking to increase their (s)miles per gallon

By Scott Pimley

Wherever we turn lately, the idea of living a green lifestyle is not far away. In the automotive world, the introduction of hybrid vehicles has received a great deal of attention. This article attempts to demystify hybrid vehicles by examining consumer attitudes about them.

It is important to note that not all hybrids are created equal, and many factors will impact their performance. According to greencarcongress.com, among the factors that will define a hybrid vehicle's performance are: the power and quality of its electric motor, the type and efficiency of its fuel engine, the quality of its engine powertrain management software and its battery capabilities. Most consumers are unaware of these factors. Still, these qualities will impact performance and thus condition how consumers estimate their return on investment with a hybrid vehicle.

The alternative technology that goes furthest toward winning the race is likely to become dominant, given the importance consumers place on fuel efficiency. New interest in clean diesel technology and full electric vehicles may lead to innovations with these technologies that produce higher MPG. It is unclear exactly where hybrids and other alternative technologies will lead manufacturers. However, as hybrids represent the first green technology to catch on in the U.S., it is interesting to see how the vehicle's early adopters are reacting to them, and to determine what is working and what could be improved. The issues will remain crucial for vehicle manufacturers as they grapple with meeting corporate average fuel economy (CAFE) standards, regardless of exactly where the alternative fuel pendulum swings.

How do vehicle owners feel about hybrids?

In Maritz Research's New Vehicle Customer Study (NVCS), we have been collecting data on hybrids for model years 2005 though 2007. We arranged the results of our analysis to correspond with the ownership cycle. We first discuss consideration of hybrid vehicles and then move on to purchase. We next turn to the early ownership experience. Finally, we conclude with new owners' thoughts regarding purchasing hybrid vehicles in the future.

The studies are nationally representative of individuals purchasing or leasing vehicles during each model year. The survey covers the period of early ownership and most respondents complete it within a couple months of purchase. For a given year, sample sizes are large, generally in excess of 100,000 respondents. This provides us with sufficient data to examine the relatively small

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Figure 1: Percent Would Consider Hybrids

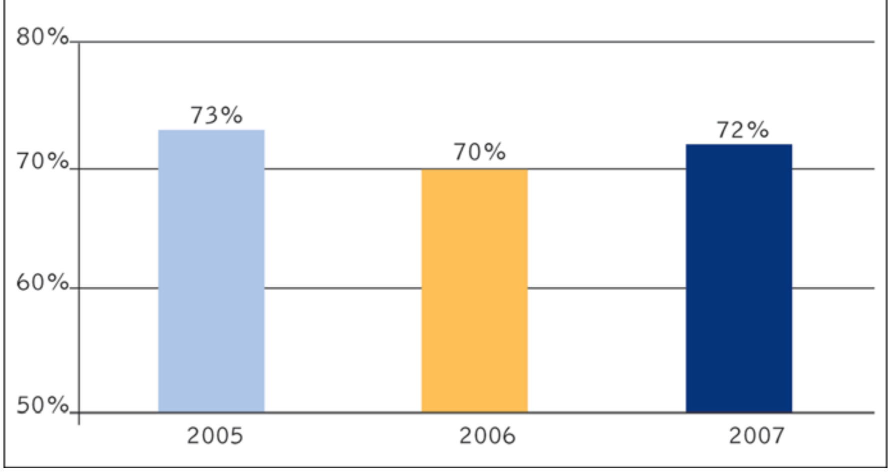
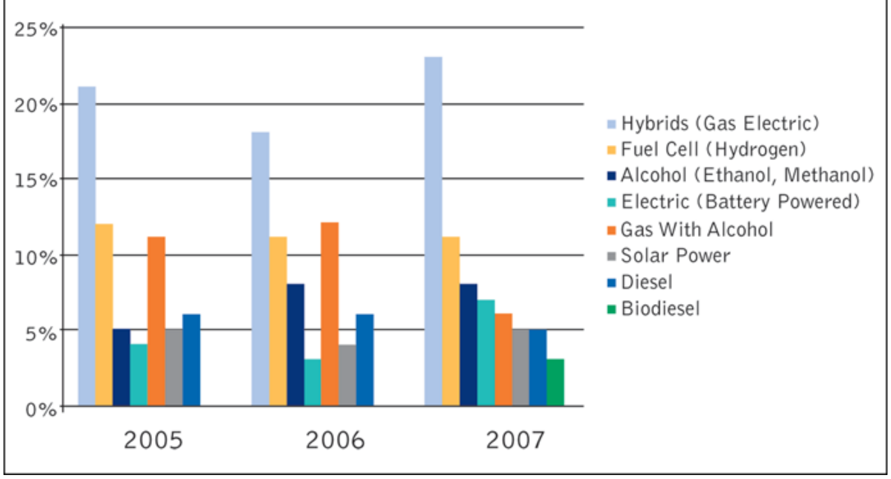


Figure 2: Preferred Alternative Fuel



proportions of individuals who have purchased a hybrid vehicle.

Key findings

Consideration of hybrid vehicles Americans' interest in hybrids and the promise of fuel economy and environmental friendliness is demonstrated by their willingness to consider hybrids and their consistent ratings of hybrid fuel solutions as their top alternative fuel choice.

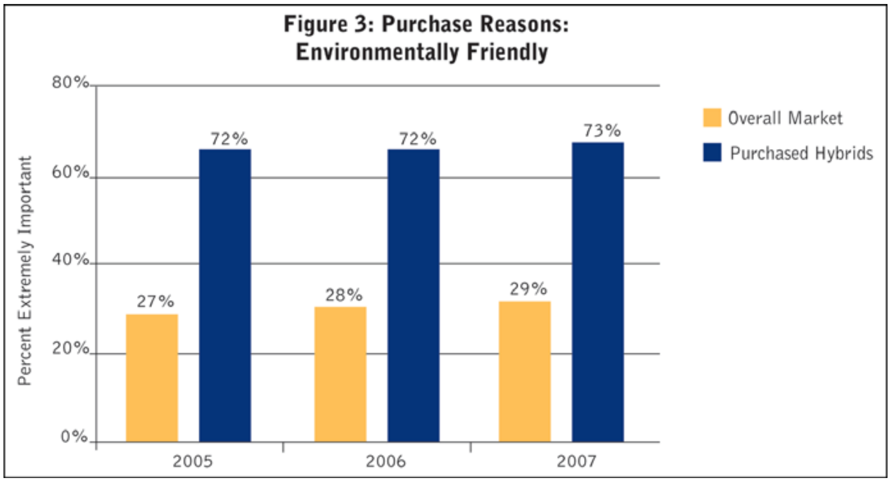
When asked whether they would consider a hybrid version of their new vehicle had it been available, roughly seven in 10 indicate they would have. However, as Figure 1 illustrates, in 2005, 73 percent of new owners would have considered a hybrid, though this fell slightly in 2006 and 2007. Whether the high score achieved during the first year of hybrid introduction will return in the future will probably be heavily influenced by consumer satisfaction with vehicles going forward.

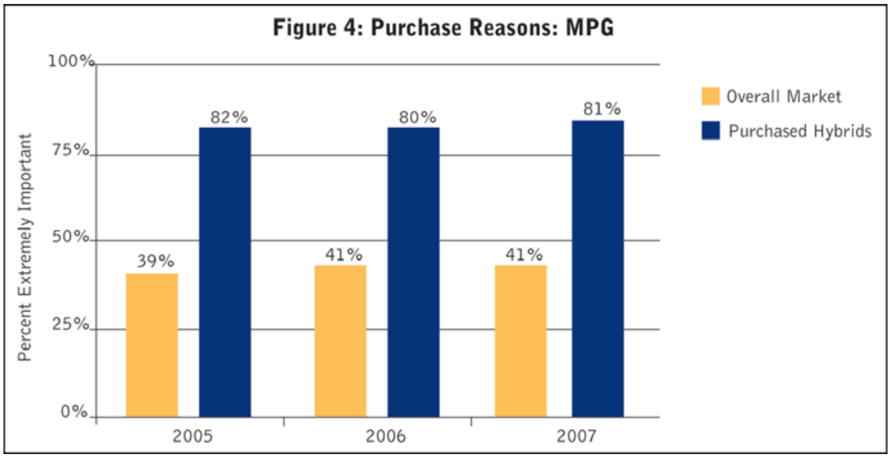
In addition to their high likelihood to consider hybrid vehicles, in Figure 2 we see when asked what type of alternative fuel they found most appealing, vehicle buyers most often indicate hybrid vehicles are their preferred alternative fuel type. The proportion listing hybrids, though relatively low, is still substantially higher than the next alternatives. This is most likely because hybrids are probably the best-known alternative technology at this point. In addition, it may result from a lack of knowledge of some of the recent advances in diesel and especially biodiesel. In addition, there has been an increased interest in pure electric vehicles. The uptick likely reflects new developments in electric engines and public relations activities surrounding them.

Purchasing a hybrid

So, how does the interest and buzz about hybrids translate into purchasing one? Since the introduction of hybrid vehicles in 2005, the units have realized a slight increase in the proportion of the market taken up by hybrid vehicles as total share of market. However, the proportion still remains under 5 percent. Using data from *Automotive News* and HybridCars.com, we estimate that in 2005 roughly 1.1 percent of new light vehicles sold were hybrids, while the figures for 2006 and 2007 are 1.5 percent and 2.2 percent respectively. The gradual increase in the demand for hybrid vehicles is driven partially by the increasing diversity in brands and vehicle types offered. For instance, in 2005 only four brands were represented in the hybrid market, whereas in 2007 that increased to seven. Similarly, the hybrid market has become more diversified in terms of vehicle types, with 71 percent of hybrids in the market in 2005 consisting of small cars, but decreasing to 61 percent by 2007, with models in other vehicle segments filling in the gaps.

Also, not all hybrid systems are alike. Full-hybrid vehicles can start and be propelled without the use of any power from a traditional fossil-





fuel engine. Vehicles such as the Toyota Prius and Ford Escape operate with a full-hybrid system. So-called "mild hybrids" have also entered the market, and these vehicles need the use of an internal combustion engine at all times, while the electric motors assist in propulsion. Vehicles such as the Honda Civic Hybrid and Chevrolet Silverado offer mild-hybrid systems. The introduction of these mild-hybrid systems has also been a source of incremental growth.

Environmental and economic reasons for purchasing a hybrid

When considering purchasing a new vehicle, those who choose hybrids are motivated by a desire to obtain an environmentally-friendly vehicle, but even more importantly, to achieve the greatest level of fuel economy. In Figures 3 and 4, we compare the proportion of all new-vehicle owners against those who purchased hybrids, examining the proportions of each who consider environmental friendliness and fuel economy (MPG) extremely important. Across all three years, individuals who purchased a hybrid were significantly more likely than buyers in general to consider environmental friendliness (roughly seven in 10 vs. three in 10) and especially MPG (roughly eight in 10 vs. four in 10) extremely important.

When asked to name the most important reasons for purchasing their vehicles, hybrid owners across all three years name fuel economy and environmental friendliness as their two most important reasons. In fact, from among an extensive list of purchase reasons, roughly four in 10 hybrid owners select fuel economy and another two in 10 choose environmental friendliness as the most important reasons they purchased their vehicle. This pattern differs markedly from that demonstrated by vehicle buyers overall, who are divided in terms of what they consider most important; the maximum proportion choosing a reason (reliability) was about 11 percent. In addition, in reviewing the purchase reasons data, we see those who chose hybrids are more likely than owners in general to consider issues such as style, comfort, roominess and even price to be significantly less important.

Figure 5: Overall Opinion of Vehicle

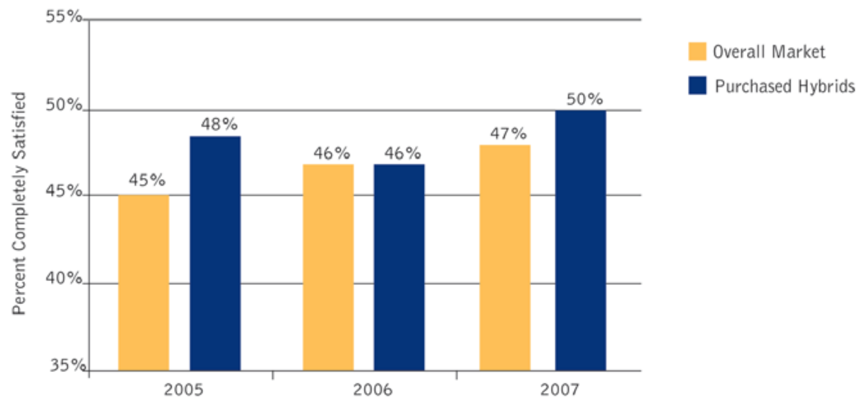


Figure 6: Experienced a Problem

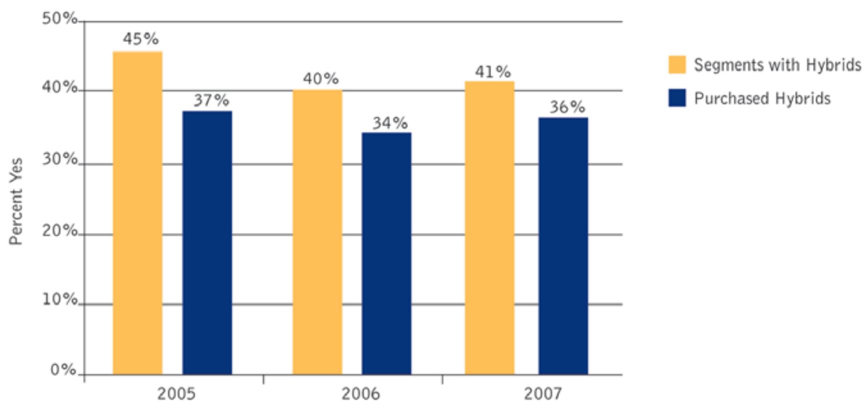
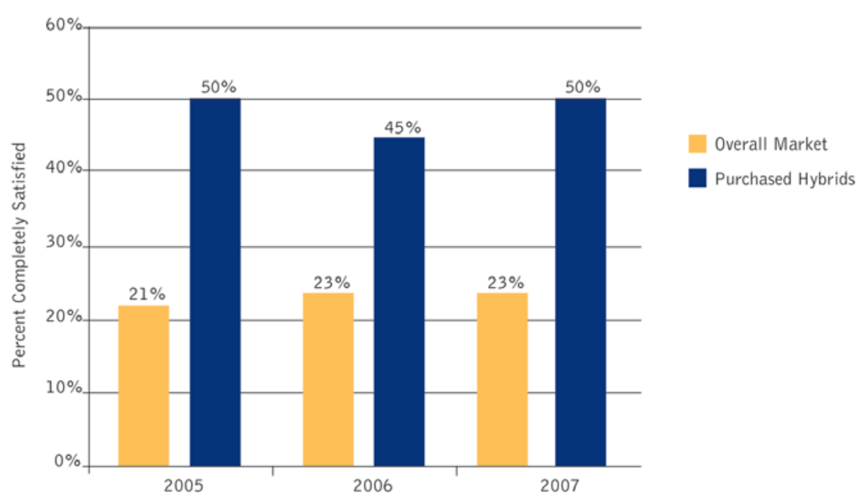


Figure 7: Feature Satisfaction: MPG



Owning a hybrid

Over the past three years, hybrid owners have consistently provided similar ratings about their hybrid ownership experience. Generally, they report ownership experiences similar to those who purchase non-hybrid vehicles. However, when it comes to experiencing problems, hybrid owners actually report fewer problems than owners of vehicles in segments in which hybrids are represented. Also, while they tend to be particularly satisfied with their MPG, it appears to fall far short of their expectations.

In Figure 5, we show the proportion of new owners who are completely satisfied with their vehicles both for the market overall and among hybrid purchasers. Across all three years, it appears that hybrid owners register approximately the same level of satisfaction with their vehicles as consumers in general.

In Figure 6, we show the proportion of new owners who have experienced a problem with their vehicle. (In this analysis, we compare hybrid owners against those who purchased a vehicle in segments where hybrids also occurred. This reduces the bias associated with including trucks, whose owners typically report a higher proportion of problems.) Across all three years, it appears that hybrid owners are less likely than those in the vehicle segments in which hybrids occurred to have experienced a problem. In 2005, hybrid owners were eight percentage points less likely to have experienced a problem, while the respective percentage differences in 2006 and 2007 were six and five. It will be interesting to investigate whether hybrid owners continue to report fewer problems over the ownership cycle.

In addition, hybrid owners are significantly more likely than buyers overall to indicate complete satisfaction with the mileage they receive. Figure 7 illustrates that across all three years, hybrid owners are about twice as likely as the market in general to indicate they are completely satisfied with their MPG. In fact, in 2007, hybrid owners report they obtained a median MPG of 42, both in city/suburb and highway driving, compared with buyers overall who report 20 and 25 miles per gallon, respectively.

However, despite obtaining higher MPG and greater satisfaction with it, hybrid owners report their MPG falls far short of their expectations. In fact, hybrid owners are significantly more likely than vehicle purchasers in general to obtain lower-than-expected MPG. In Figures 8 and 9, we show the proportion of vehicle owners who are getting lower-than-expected MPG both for city/suburb and highway driving. Over the past three years, roughly half of hybrid owners indicate their city/suburb and highway mileage fell below their expectations, significantly higher than the market in general. This suggests a communication opportunity in informing consumers of realistic MPG under real-world conditions. The way things stand today, some consumers are most likely feeling they got a "bait and switch" on MPG.

Still, not all hybrid models are created equal. In Figure 10, we show the proportions of new-vehicle buyers

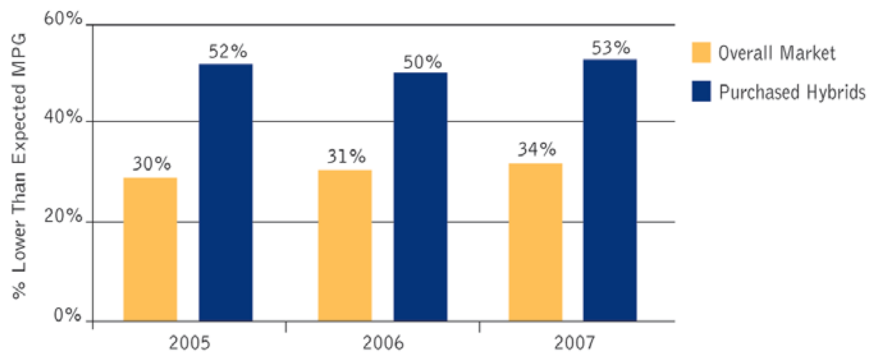


Figure 8: City/Suburb Mileage Expectations

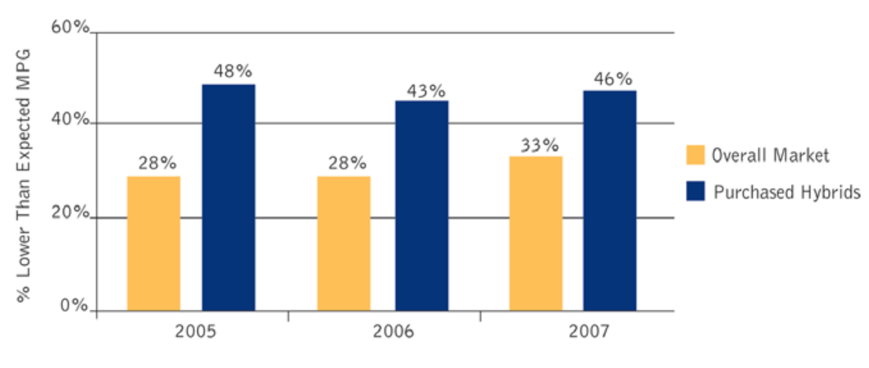


Figure 9: Highway Mileage Expectations

claiming their city/suburb and highway MPG at least meets their expectations for the hybrid models that do the best and worst. Within each year, the differences between the models that perform best and worst on MPG typically vary between 30 and 40 percentage points. Some of this is due to the different emphases manufacturers place in designing hybrids. Specifically, some stress performance and these models tend to obtain lower MPG. Still, it is reasonable to conclude that some automakers are doing a better job of setting customer MPG expectations.

In 2008, federal guidelines for estimated MPG are set to change and become more reflective of how people drive, in that the testing will more accurately reflect speeds typically driven, use of air conditioning, etc. The government predicts that estimated MPG stickers will reflect lower MPG across the board, but that the current estimates for city driving in hybrids should drop most dramatically (i.e., about 20 percent to 30 percent). It will be interesting to see whether this more accurate labeling of performance will reduce expectations for hybrid vehicles going forward.

Thinking about hybrids: the future

When looking toward the future, how do consumers feel about hybrids? In Figure 11, we report on the proportions of consumers who would consider fuel economy, availability of hybrids, and advanced environmental technology extremely influential when purchasing their next vehicle. From 2005 to 2007, nearly four in 10 new purchasers indicate that when looking forward to their next vehicle, fuel economy will be an extremely important influence. While far fewer specifically indicate that advanced environmental technologies and the availability of hybrids will be extremely influential to them, we believe that to the extent hybrids and other advanced environmental technologies continue to yield greater MPG, they will be more appealing to consumers.

Paying attention

Data from Maritz' NVCS studies clearly show that Americans are paying attention to the development of alternative-fuel technologies in general and hybrid vehicles in particular. More of this appears to be driven by an interest in fuel economy and MPG than environmental concerns, though the environment appears to be part of the consideration set for many Americans.

At this juncture, it is not entirely clear how hybrids will fare with new vehicle buyers. On the one hand, hybrid technology appears to be the favored fuel alternative. In purchasing their most recent vehicles, roughly seven in 10 Americans would have considered a hybrid if it had been available in the model they were looking for. If vehicle manufacturers start to increase the number and types of hybrid models available, then interest

Figure 10: Models Best and Worst at Meeting MPG Expectations

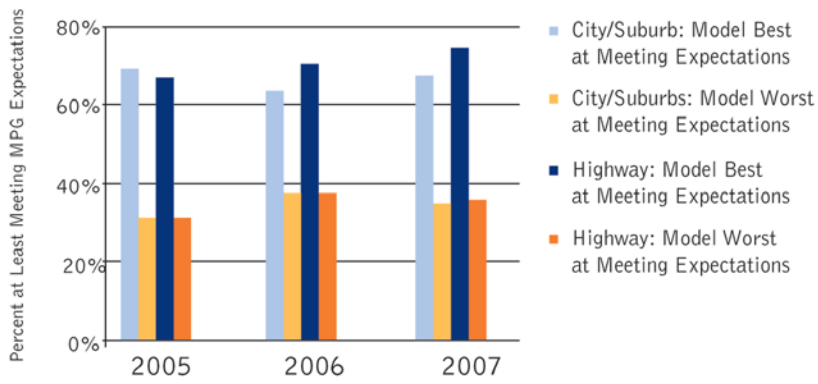
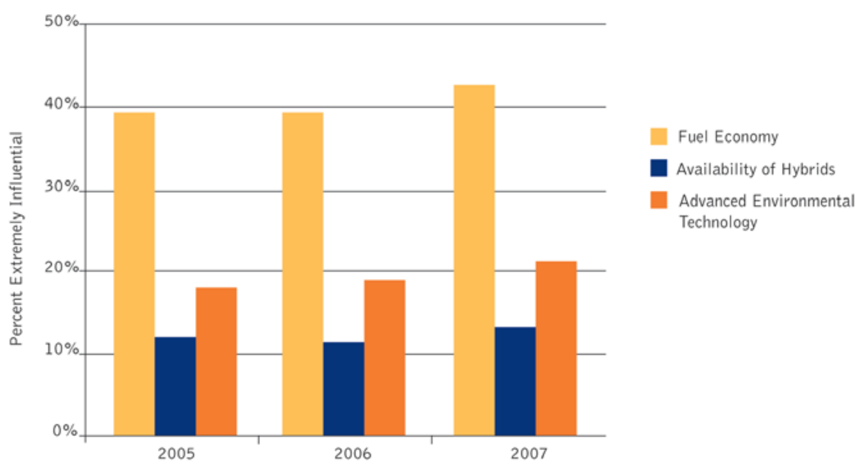


Figure 11: Influential in Future Vehicle Purchase



in and purchase of these vehicles could well increase. Also, if hybrids continue to have fewer problems than other vehicles and this extends throughout the life of the vehicle, this could motivate buyers to more seriously consider them for their next vehicle.

On the other hand, certain factors could move interest away from hybrid vehicles. Keep in mind that the data reported here only cover recent purchasers of vehicles. It is still an open question how owners will feel about hybrids over the course of ownership. For instance, over the long haul, owners might find that their dashed MPG expectations detract from their satisfaction with their vehicle. This clearly will vary by model and some models may end up being winners here while others may fall away. Looking forward, it is not clear how hybrid owners will feel about their vehicles if their battery should die and the alternatives are paying thousands of dollars to replace the battery or purchasing a new vehicle.

Another factor that could reduce interest in hybrids would be the development of alternative technologies such as biodiesel. In fact, we are seeing renewed interest in the industry in new clean-diesel technology (BMW, VW, Mercedes and others) and full-electric technology (Nissan, Subaru and others).

Great favor

In the relatively short run, as fuel prices continue to escalate, the technology that wins the maximum MPG race will most likely garner great favor. It may be that hybrids are the future (they certainly have a strong positive halo) or they may be a transitional step toward other technologies. Whether this will be a hybrid or something else is not clear as auto makers work furiously to meet CAFE standards. Environmental concerns and fuel prices are driving the market to find more fuel efficient forms of propulsion. This is instilling innovation in the industry and creating more drivetrain market fragmentation.

In short, only time will tell how hybrids will fit into the offerings of automakers in future years. We will certainly continue to track hybrids and to see how they stand up against both conventional and alternative automotive technologies. | Q

Profiling another car-buying sub-group

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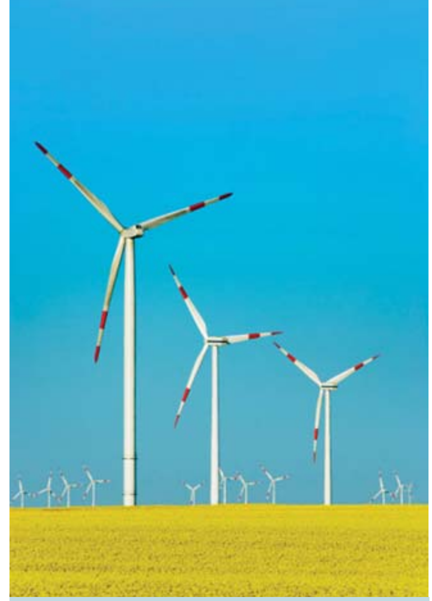
green research

Grow your awareness of green



By Kent Ragen

Getting to know eco-aware consumers

The drumbeat gets louder by the day: the environment matters. Global warming is threatening. Food shortages, spiking oil prices and carbon taxes steal the headlines.

Whatever side of the environmental debate you find yourself on, there is no denying that the environment is on the minds of consumers. Though it hit with the force of a teenage fad, by most accounts eco-awareness appears to be here to stay. Indeed, surveys abound with data showing that nine in 10 Americans describe themselves as "conscious consumers," 88 percent say that it's "their duty" to protect the environment, and there are even studies showing that a large percentage of consumers are willing to pay more for products that, all else equal, are thought to be more eco-friendly.

So it's not surprising that marketers have taken notice. Indeed, even if one ingests several grains of salt while reading the eco-leaning survey results, there is little doubt that the LOHAS (Lifestyles of Health and Sustainability) and Millenial (ages 7 to 29) segments of the buying public represent a huge consumer base in and of themselves. And with individuals outside of those segments becoming increasingly aware of our environmental challenges, it's possible to draw the conclusion that the new mass consumer is actually a green consumer.

How loud?

Where does the voice of the eco-aware consumer come from, and how loud is it? Studies indicate that LOHAS and LOHAS-leaning consumers in the U.S. amount to approximately 70 million, or roughly 40 percent of the adult population. As environmental awareness grows and the Millenials continue to mature and grow in buying power, well over 50 percent of adult consumers can be expected to consider environmental attributes when making purchasing decisions. A recent study of consumers showed that roughly two-thirds believe that sustainability is not a fad but rather is here to stay for the long-term.

To be sure, there is evidence that the results of all these studies are not representative of actual buying habits. Even the most popular green products are still selling at only a fraction of their traditional counterparts. Despite the hoopla generated by the media, there is a lot more talk than action.

Part of consumers' reluctance to buy green products stems from

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skepticism toward marketers' eco-friendly claims. This has led to the concept of greenwashing - overstated or misrepresentative green claims made by marketers - which has lent an air of suspicion to virtually all green marketing.

To learn more and even participate in the greenwashing discussion, visit www.greenwashingindex.com, where you can rate real advertisements on their green claims. Your opinions, in combination with those of other participating consumers, result in a score on the Greenwashing Index. There are also several programs whose goal is to educate consumers, such as National Geographic's Greendex project, which monitors the consumption habits of 14 different countries around the globe. Not surprisingly, the U.S. economy rates the lowest on the Greendex.

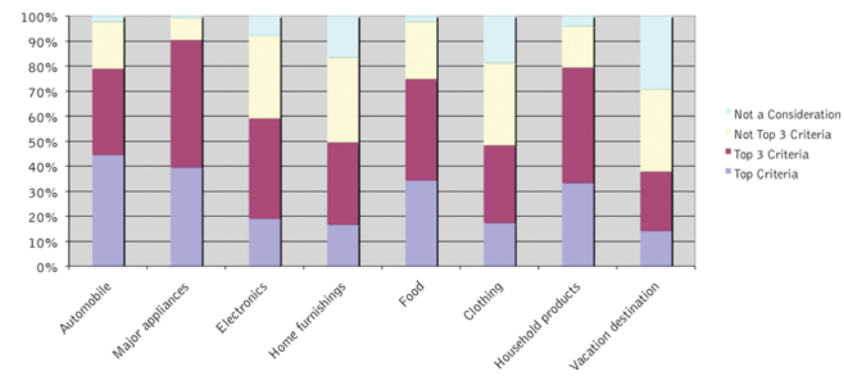
But these are just potholes, normal growing pains that should be expected as our economy undergoes this tectonic shift toward environmental sustainability. We are witnessing an economy and consumer base that is beginning to develop a higher environmental IQ, as evidenced by the growing eco-awareness and environmental sophistication of the average consumer.

Understand and learn

Our research bears this out. Studies conducted over the past six months with our EcoUnit panel of eco-aware consumers provides several insights that are further evidence that marketers need to understand and learn from the growing base of green-leaning consumers.

First, our findings support the mountain of evidence that the entire environmental and sustainability movement among consumers is in its infancy. As an example, when we asked our panel how many of them have incorporated common eco-actions (e.g., recycling, going paperless by switching to online bank statements, reusable bags) into their daily lives, less than 40 percent raised their hands. By contrast, over 80 percent said that they intend to incorporate these changes into their daily lives over the next 12 months.

Figure 1: Importance of Eco-Friendly Features



Furthermore, even the relatively well-informed eco-aware consumer is suspicious of green marketing claims. When we asked the panel how frequently they suspect greenwashing, roughly 30 percent of respondents stated that over 50 percent of green claims they hear or read in advertisements are greenwashing. And fully 40 percent said that they suspect greenwashing 25-50 percent of the time - still a disturbing statistic for a group that is squarely in the sights of the green marketer.

Perhaps surprisingly, the makeup of our panel is quite average. We source our panel members in various ways, including standard lead-generation programs (organic and paid search as well as affiliate programs), participation in various online forums and blogs, and by attending green events. Due to the viral nature of environmental issues, we receive a large number of new panel members through referrals.

In looking at our member base, there is certainly a bias toward younger generations, and on a gender basis there is a tendency for women to be more attuned to eco-issues than men. To be sure, there is a slight tilt toward the West Coast over the East Coast. But these types of tendencies are not as strong as you might think. For example, 54 percent of our panel is female versus 46 percent male. Similarly, the age distribution is close to a bell curve: 8 percent is age 17-21, 6 percent is over the age of 60, and the remaining 86 percent is evenly dispersed in between. So, at least by these measures, the eco-aware consumer bears a resemblance to the mass consumer.

Green scale

An emerging aspect of market research in the eco-sphere is comparing opinions, perceptions and habits based on greenness. During the EcoUnit sign-up process, we ask each new member to categorize themselves on a green scale. Our panel of eco-aware consumers categorize themselves 43 percent light green and only 11 percent dark green, with the remainder falling in between - further suggesting that the green consumer is the new mass consumer.

By categorizing each member on a green scale, we are able to identify trends and opportunities by correlating responses with green categorization. This can result in interesting findings that guide positioning and strategy. For instance, in a recent client program we found that individuals who experienced a certain new green product tended to have a positive experience with it independent of their personal greenness; at the same time, the dark green crowd was significantly more likely to have heard of or to have experienced this product. The result was a revised strategy aimed at generating awareness and sampling opportunities among light greens while enlisting the dark greens in a viral program.

Highly viral

In fact, there is ample evidence that eco-aware consumers are a highly viral group. Regardless of where they fall on the green scale, the eco-aware are actively seeking out new information and eager to try new, better products. The blogosphere is filled with forums and groups dedicated to sharing ideas for reducing pollution, saving energy and adopting greener products. Among our panel members, approximately 35 percent read blogs and participate in social networks daily, 25 percent are involved in them at least weekly, 15 percent are occasional users and the remaining 25 percent never utilize these mediums. As a marketer you may have several reasons why you want to engage your customers and prospects in the social media world, but clearly one of them should be that the influential eco-aware crowd is active there.

Based on what we hear and read in the media, one would think that virtually any and every product has a viable green equivalent. But our research shows that the eco-aware consumer is much more concerned about the environmental attributes of certain categories of products while less concerned about others (Figure 1). Automobiles and household products, for instance, top the list of items that consumers want to be green. Apparel and electronics, on the other hand, are relatively low on the list. Given how young the market is, it makes one wonder whether all of the green apparel companies have a firm grasp of their target market.

Though the importance of eco-friendliness varies by product category, consumer perception of a company's brand is important across categories. Perhaps most telling, a recent survey of our panel asked the question: Does a company's reputation and philosophy regarding the environment impact how loyal you are to their brand? Seventy-four percent of respondents replied with an emphatic yes; only 6 percent replied no.

As marketers, it's critical that we understand consumer perception of our brand and products in this new green world. It's imperative that we seek input from eco-aware consumers as we chart our strategy, because both the opportunities and the cost of missteps can be huge. And once our strategy is set, we should leverage the early adopter influencers in order to gain maximum momentum in this rapidly-evolving and competitive new environment.

Trend will continue

As clear as it is that environmental awareness among consumers has just begun, it's equally clear that this trend will continue throughout all of our lifetimes. Our ability to improve our standard of living and those of less-developed countries depends on it. As more consumers come to this realization, virtually every company in every industry will be forced to understand the eco-aware consumer. | Q

Get the lowdown on LOHAS

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research education and training

Learning to improve

By Jim Berling

Each year I have the opportunity to interact with thousands of research professionals across a wide range of industries. I hear their stories, we discuss their needs and I read their feedback. What I have discovered is that many researchers are being thrown into the fray, forced to learn as they go. On-the-job training can be one of the best learning tools if we are aware when we make mistakes and know how to correct them, but all too often we transition from one project to the next without any feedback or critical review of the project completed.

Moreover, learning is often passed on from one researcher to the next by telling them to review old reports, projects and questionnaires for use on future studies, not realizing that errors made in the past are now being repeated over and over. The cycle of reproducing the same errors continues until someone within the organization takes a stand and challenges the status quo. For example, we asked one of our pharmaceutical clients why they asked the following question in this particular way, "Doctor, what percent of your time do you spend in a hospital?" The answer was, "We phrase the question this way because it has always been asked this way." What the original designer hadn't realized is that there are a number of problems with this question. Take the perspective of the doctor trying to answer the question. What is meant by spending time in the hospital? Is this time visiting with patients, in surgery, meetings, consultation time? The other issue with this question is asking the survey respondent to figure out a percentage, which means they have to know what goes into the numerator and denominator. In this question, how should the denominator be calculated? Is it a 40-, 50- or 60-hour week? Should on-call time be included?

Continuous marketing research education benefits the entire industry

Well-designed questions should eliminate ambiguity and provide a consistent frame of reference for each survey respondent. A simple solution would be to ask the question like this, "Approximately how many patients did you see in a hospital during the last seven days?" Based on tracking doctors' response to this question and comparing the results to their actual behavior, we have found that the doctors can provide a relatively accurate approximation that we can use during the analysis phase. This particular example is one of many marketing research-related errors that occur too frequently across our industry on both the supplier and client side.

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Listens to:	Garrison Keillor, every Saturday
Thinks:	Her avatar's hair should be longer
Feels:	Your client's brand…

"Gets me"

"Makes me feel good about myself. Reflects who I am and who I want to be."

As a marketing researcher, it's vital to understand Kelly. And to find others like her who are passionate about your client's brand. But people with eclectic interests can't always be found in homogeneous sampling sources. Just because they buy diapers or fly a particular airline doesn't mean they're right for your sample.

You need a sampling provider who understands and appreciates the complexity of people. And the complexity of sampling. A partner to consult with you on your questionnaire. To help refine issues with language, lifestyle, logic or length. Even let you pre-test questions or screen respondents in advance.

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Failing as an industry

Let's look at some of the topics being discussed at marketing research conferences, such as panel quality, mitigating risks and improving accountability. Part of the reason these issues are so prevalent is because we are failing as an industry to provide the necessary foundation of well-educated, fundamentally-sound research professionals. Each year, both new and seasoned marketing research professionals go untrained, even though there are corporate directives and individual goals to enhance their overall skill sets.

When asked why corporations or individuals are not pursuing the myriad of training options available to them, I hear the same old issues, such as budget constraints, travel limitations and not enough time. With today's education and training options these excuses should no longer be acceptable answers to why we can't improve the overall of quality of research across the industry.

The following training and educational breakdown includes some of the latest advancements in the industry as well as a few of the more tried-and-true options.

Distance learning. Distance learning allows students to engage in independent learning activities from a remote source, usually combining a textbook with online discussion groups. The benefits include flexibility in scheduling, the ability to participate in training from a remote location, limited or no travel requirements and the student's ability to progress at their own pace.

The main concerns with distance learning involve the lack of direct face-to-face interaction with fellow students and the course instructor, the inability to ask questions and get answers in real-time and a learning pace extended over a longer period of time compared to traditional face-to-face education. The most highly-regarded program is the Principles of Marketing Research Program sponsored by Marketing Research Institute International (MRII) and the University of Georgia.

Webcasts. A Webcast offers students the ability to listen to a live or prerecorded training session while they are viewing an online presentation. Usually a Q&A session is available at the end of the presentation. Benefits include the ability to participate in training from a remote location, limited or no travel requirements and the ability to ask questions as they arise if it is a live session. However, sessions typically run for only an hour or less, so topics have to be very narrowly focused. In addition, with no in-person or face-to-face contact, it is difficult to directly engage and motivate attendees or work in small teams. Most of the larger research supplier firms have produced Webcasts with content about current issues or specific protocols the firms use and sell.

On-site custom courses. On-site custom courses let organizations design a program that best meets the needs of their target audience. The educational content can be delivered either in-person or via Webcast. The benefits of these programs include lower per-person cost of training compared to attending public sessions. Content can be customized and adapted to address the particular needs of the company. Proprietary examples and upcoming projects can also be discussed without the possible presence of competitors.

Drawbacks to this method are that the training typically requires at least five or more people to be cost-effective, and customization is limited to the expertise and breadth of offerings of the educational provider. Most training and education providers can offer on-site custom courses. One provider of onsite custom programs is Burke Institute.

Podcasts. Podcasts are typically prerecorded training sessions that consist of audio files or audio and video files that can be downloaded from the Internet. The files can then be played using a computer or any device that can access the audio or video file formats. A podcast can also be subscribed to and downloaded automatically when new content is added.

On the downside, podcasts are one-way communication tools. Individuals only receive information, they cannot interact directly with the training leader nor can they ask questions or get clarification on the content.

Professional certification. The Marketing Research Association (MRA) has taken the lead to develop a professional certification process for the marketing research industry. An ongoing certification process, the Professional Researcher Certification (PRC) designation is designed to, as described on the MRA Web site, "encourage high standards within the profession to raise competency, establish an objective measure of an individual's knowledge and proficiency and to encourage continued professional development." There are currently 1,035 professional certified researchers listed on the MRA Web site (www.mra-net.org).

In addition to the professional certification process, there are other educational programs that offer tangible recognition for marketing research professionals. Some of the other well-known and highly-respected programs include the masters of marketing research (MMR) program from the Terry College of Business, University of Georgia; the MMR program from Southern Illinois University-Edwardsville; the master of science in marketing research from the University of Texas at Arlington; the marketing research MBA from the A.C. Nielsen Center at the University of Wisconsin-Madison; Riva's Master Moderator program and the Burke Institute's certificate of proficiency programs.

Improve the quality

With all of these training tools at our disposal, we are well-equipped to improve the quality of marketing research across the industry. Take time to review your professional development goals and those of your company and determine how to balance the multitude of education and training options while continuing to pursue those on-the-job learning opportunities. The reputation and long-term viability of our profession depend upon it. | Q

I need to know more

Interest increasing in distance learning for marketing researchers

By Donald J. Marek

You can't open a newspaper today without learning that economies and businesses worldwide are slowing down due to increased energy costs, turmoil in financial markets and political uncertainty. The global slowdown is also affecting the marketing research industry.

One area of our industry that is experiencing unparalleled growth in 2008 is Web-based marketing research training and education, also known as distance learning. Our organization, which provides this type of training, has seen a 38 percent increase in student enrollments this year.

Student comments indicate they like the distance-learning approach to marketing research education. "The material is optimal in terms of depth of coverage, i.e., thorough in the important areas, yet brief enough to be interesting," said Corazon Nolasco (retired), International Consumer Products Company, Philippines. "The online approach and independent study are excellent since one can manage study time versus other priorities. I am glad I pursued and completed the program."

Online or distance learning is done via the Internet. Students typically take their classes while they maintain other activities such as a full-time job. When education is online, students can be located far from the educational organization – essentially anywhere in the world. Students can enroll in the courses anytime throughout the year. They proceed through the courses at their own time and pace. Such professional development graduates typically receive a certificate showing that they have completed their course and passed all tests.

Continuing education is different from academic education in that students do not work toward a degree such as a master's in marketing research or MBA. Because students are not working toward a degree, they do not have to go through an application/admissions process and take time out to attend classes. Students must simply meet course prerequisites and have time to devote to the course material.

Why is continuing education suddenly of such interest to our profession? There are several factors at work.

Globalization has had a major effect upon marketing research and research-focused continuing education. As international companies

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open offices all over the world, they hire excellent employees to staff those offices. But many firms are finding that those employees, while well-educated and -qualified, have different frames of reference. As a result, multiregional studies do not run as smoothly as the companies would like. To enable their employees to work seamlessly across the world, multinational companies are enrolling groups of their employees in online courses. This practice gives them a common terminology and frame of reference, so they will approach projects in similar and efficient manner.

As research becomes more global, client-side companies are increasingly conducting research in countries that are new to them. As those firms discuss research with local providers, sometimes there is uneasiness as to whether all parties fully understand what is required. Common training lets both parties be confident that they are communicating accurately. This is especially true in developing and emerging nations. By completing an online research course, suppliers in developing countries become familiar with the projects and terms used by foreign research buyers. In turn, research buyers can have more confidence when they buy from someone who has earned a research certificate.

Cost-cutting

Another factor is the pressure that cost-cutting measures are putting on companies' internal training and tuition reimbursement plans. As in-house training is cut, employees find they need alternate sources for furthering their education. To meet employee demands, companies are enrolling their employees in distance learning courses.

Online marketing research courses cost about $1,300 for a comprehensive course ($1,000 in tuition/fees and $300 for textbooks). External marketing research training usually involves higher tuition, travel and lodging expenses. Traditional in-house training involves course development, internal or external trainers and classroom/meeting room time.

The biggest drawback to online education is that students tend to become distracted and fail to complete the course. To overcome this problem, companies enroll multiple employees and organize those students into study groups, which are becoming a modern version of in-house training. Typically, study groups are led by a senior researcher or HR personnel within the company. These groups meet on a regular (generally monthly) basis to discuss the latest module or chapter of the online course. Discussion of the material enables the group leader to know each student better and is an opportunity to provide company-specific examples to augment course material. Meeting with a senior researcher or company HR representative also places gentle pressure upon students to progress through the course.

More sophisticated

As new forms of electronic data collection develop and computer software becomes more sophisticated, the collecting, analyzing and reporting of research information has become easier. But that doesn't always mean the reporting and analysis is being done correctly. In addition, there are more and more situations where non-researchers are tasked to collect and sell marketing research-like information.

To ensure research is done correctly and represented properly to buyers, it has become increasingly important to certify marketing researchers. Strong certification efforts are under way in North America, in the U.S. with the Marketing Research Association's Professional Research Certification designation and in Canada with that country's Marketing Research & Intelligence Association's Certified Marketing Research Professional designation. The U.S. and Canadian efforts were preceded by similar certification programs in Europe.

Generally-accepted certification designations entail four elements: education, experience, ethics and a certifying body to test the student.

Online comprehensive marketing research courses provide the education needed to take and pass the certification exams. As a result, researchers in the United States and Canada, as well as those in other parts of the world, are turning to online courses as they prepare for marketing research certification exams.

Fast-growing

A final factor is the influx of non-researchers who are gravitating to our industry because of its high growth. Despite this year's slowdown, marketing research is a fast-growing worldwide industry. For example in the U.S. marketing research has a 16-year average growth (1988-2003) rate of 8.1 percent[1]. In 2007 and 2006, total U.S. marketing research expenditures grew 6 percent and 6.6 percent respectively[2]. ESOMAR estimates global marketing research is growing faster than it is in the U.S. market. In 2006, the global research growth (currency-adjusted) of 6.8 percent[3] was 3 percent higher than the growth of the U.S. market.

Newcomers to the industry enroll in online marketing research courses because they find it is a quick way to become familiar with our industry and the certificate that comes with graduating from an online course is a way to establish their research credentials.

Prepared for the challenges

The current boom in marketing research continuing education stems from globalization, expense control, technological advances and industry certification efforts. These factors are causing our industry to turn to online marketing education for its employees. In addition, the attractive growth rate of our worldwide industry is drawing new people to our courses. The current boom is good for our industry because it means future professionals in our industry will be well-educated and prepared for the challenges we face. |Q

References

[1] *Inside Research*, May 2008, Issue 240, P. 1
[2] Ibid.
[3] See full ESOMAR report at www.esomar.org

Outwit, outlast and outplay

Concept development, *Survivor*-style

By Martha E. Guidry

Launching new products or services is often a key strategy behind building market share and meeting profitability goals. Marketers continually feel pressure to develop winning line extensions and new offerings in an environment where survival of the fittest can be a reality. Over time, it becomes increasingly challenging to maintain a significant edge vs. the competition to maintain retail space, cachet and even a place in the consumer's mind. Thus, the need to develop high-quality, winning concepts for these new products or services is paramount.

According to Procter & Gamble, a concept is simply "a promise a product [or service] makes to resolve an unmet consumer need, the reason why it will satisfy the need, and a description or portrayal of any key elements that will affect the perception." While the definition sounds relatively simple, creating a winning concept can be more challenging than first imagined.

The hit CBS reality TV show *Survivor* - with its "Outwit. Outlast. Outplay." tagline - offers a useful context in which to study the concept development process. To survive in the world of new product and service initiatives, a savvy marketer must outwit, outlast and outplay the competition to ensure new concepts are created to succeed in the market. Hopefully, this simple framework with key watch-outs will allow you to be a smarter concept developer in your next effort.

Although I've referred to the audience for the concept as a "consumer," I use this in its broadest possible sense, to be representative of any product end user - a doctor, a doctor's patient, a business buyer of a B2B product, or the typical "head of household" consumer. At the end of the day, all these potential audiences are consumers, and the same principles of concept development generally apply.

Strategy #1: Outwit

Here, outwit is defined as being able to deceive or defeat with great ingenuity. Any concept must connect in two critical areas with the consumer in order to fit into that consumer's life in a meaningful way:

The concept must be driven by unmet consumer needs. A solid concept development process cannot occur without a complete understanding of the important consumer frustrations and desires and how they are important, consumer beliefs about these frustrations and desires, and whether or not consumers believe that any available products or services can meet these needs. Even if the consumer need creates a

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new category, such as portable music when Sony created the Walkman, which later became the premise for downloading music to an MP3 player, it needs to make sense and in some way provide a useful benefit.

Several factors often cause the creation of concepts that are too internally-focused. First, the R&D people in the organization may develop a product or service or find a technology that they see as irresistibly exciting, and they "find" (or create) a consumer to whom they can sell it. Typically, this becomes the "tail wagging the dog" syndrome, where marketers scramble to create a compelling way to convince the consumer that the product really offers them a relevant benefit, in spite of what they may know about the consumers' needs. Second, time pressure may prevent the concept development team from thoroughly reviewing previous consumer research, or the amount of research is so daunting and overwhelming that they don't give it the attention it deserves. And third, many organizations don't want to spend the time and/or money to do the research to fill in their knowledge gaps or to gain the foundational knowledge they need prior to developing the concepts.

The concept needs an emotional connection. Understanding and leveraging the emotional hook provides a context that allows the product or service to fit meaningfully into the consumer's life. Often the overt focus on the features and benefits creates a relatively flat concept in the consumer's mind. In addition, this sometimes simplistic approach may become vulnerable to competitive pressure, due to the ease with which these areas can be duplicated by the competition. If a brand can own some emotional space, it taps into the consumer's value structure and tends to tap into their wallet as well.

During development, qualitative research is critical to identifying the array of potential emotions that could be leveraged. Exercises such as a collage, laddering, analogy, visualization and personification completed during the research session can help generate the necessary consumer imagery and feelings.

Strategy #2: Outlast

Outlast is defined here as the ability to endure longer so as to overcome a challenge or opponent. This relates to understanding what you stand for in the consumer's mind and being able to own that space for the long haul vis-à-vis the competitive context.

The concept must fit with the current brand equity. In the classic animated movie *The Lion King*, Mufasa tells his son Simba to "Remember who you are." This axiom is not only true in the Disney universe, it is an essential directive for any business that wishes to develop concepts to reinforce an existing brand's equity. Unfortunately, product development efforts often go astray when the team gets excited about the possibilities and the potential of a newfangled idea that actually may not fit with the consumer's expectations of the brand. The internal momentum behind the idea puts blinders on the developers, leading to concepts that do not fit with the brand promise, resulting in a failed launch.

It is critical to collect information about consumer perceptions of the brand before development begins. The process of understanding the brand's strengths and weaknesses, its current image, what makes it different and what the brand actually can (or can't) own in the marketplace can't be short-changed. Armed with this knowledge, the development team can screen out duds and develop ideas that truly leverage the brand's market position.

The concept must consider the competitive environment. For a product or service to take advantage of its competitors' vulnerabilities, the marketer must have a clear understanding of its competitive set. Without this up-to-date understanding, a company may find that its positioning is not sitting in marketplace "white space" and consumers will not consider the product or service to be a unique offering in the category. Unfortunately, time pressure to "get something to market" often causes the development team to rush, or even skip, this important step.

Whether through primary or secondary research, the smart marketer will take the time to become thoroughly familiar with the strengths and weaknesses of its competitors' offerings, as well as identifying potential substitutes for its potential product or service. Also, remember that the marketplace can significantly change over time. Don't expect that information gathered three or four years ago will give you an accurate competitive analysis that is useful for today's concept development efforts.

Strategy #3: Outplay

Simply put, you have to play better. The three areas below relate to getting the concept foundation right so the consumer understands the central idea easily and effortlessly. Basically, all potential areas of confusion must be eliminated to

Research Company Spotlight - Concept Development

Below is a list of firms from our Researcher SourceBook™ specializing in concept development

C&R Research Services, Inc.
312-828-9200
www.crresearch.com

The Caney Group LLC
800-666-9550
www.caneygroup.com

Cheskin Added Value
650-802-2100
www.cheskin.com

ChildResearch.com
203-483-4301
www.childresearch.com

Connell + Associates
201-445-9215
www.connell-associates.com

Decision Insight, Inc.
816-221-0445
www.decisioninsight.com

Greenfield Consulting Group
203-221-0411
www.greenfieldgroup.com

HCD Research, Inc.
908-788-9393 | www.hcdi.net

Housecalls, Inc.
212-517-9039
www.housecallsobserve.com

Ideas in Focus
440-287-6844
www.ideasinfocus.com

Insights Marketing Group, Inc.
305-854-2121
www.insights-marketing.com

Just The Facts, Inc.
847-506-0033
www.justthefacts.com

LinguiSearch, Inc.
215-923-5287
www.linguisearch.com

MarketTools, Inc. » SEE AD FRONT COVER
415-957-2200
www.markettools.com

MarketVibes, Inc.
765-459-9440
www.market-vibes.com

MarketVision Research®
513-791-3100
www.mv-research.com

Millward Brown, Inc.
630-505-0066
www.millwardbrown.com

MRSI (Marketing Research Services, Inc.)
513-579-1555 | www.mrsi.com

Peryam & Kroll Research Corporation
773-774-3100
www.pk-research.com

Practical Imagination Enterprises
908-237-2246
www.practical-imagination.com

Product Ventures
203-319-1119
www.productventures.com

Research International USA
312-787-4060
www.research-int.com

The Rite Concept
860-675-5522
www.theriteconcept.com

RTi
203-324-2420 | www.rtiresearch.com

Sawtooth Technologies Consulting Group
847-239-7300
www.sawtooth.com/consulting

SpencerHall, Inc.
513-683-9724
www.spencerhall.com

StrataMark Dynamic Solutions
513-618-7150
www.stratamarkds.com

Strategic Eye, Inc.
717-520-9013

Wharf Research
415-693-8900
www.wharfresearch.com

maximize communication.

The concept must be well-written. Although clients often are bursting with ideas they want to test, crisply communicating those ideas into well-articulated positioning concepts is often very difficult. Although many marketing and R&D professionals believe that they have strong concept-writing skills, they seldom have spent sufficient time with consumers to communicate in the consumers' natural language, and they have little to no training in the art of concept writing. The net result is that many organizations are generally devoid of real concept-writing skills.

A trained concept writer can help your team by identifying common problems, from an unclear benefit or an insight/accepted consumer belief that isn't relevant to the hero benefit to a concept that is missing a key structural component. Regarding the objective eye, a skilled concept writer may also hear the obvious concept flaws - poorly-worded concepts, a lack of consumer-friendly language or not enough of the right information to make the sale.

The concept must be single-minded. Beware of the old "kitchen sink" concept. In an effort to hit too many consumer touchpoints or to appeal to a large number of consumer segments, client teams sometimes will generate a concept that is laden with a multitude of choices for the buyer, where there is "something for everyone," including: multiple insights, many different product or service benefits or several different reasons to believe a single benefit is true.

This kitchen-sink concept is pushed through the process, culminating in a very expensive quantitative test, where, because there is something for everyone, purchase intent meets the success criteria. So far, so good. But the team is in for a rude awakening when they try to translate this multiheaded monster concept into a successful copy strategy.

To be optimally successful, consumer copy must be single-minded and kitchen-sink concepts just don't fit the bill. Ultimately, the ad agency must decide what single aspect of the concept will be communicated, only to find that the stand-alone idea lacked the appeal to generate sufficient volume for the product or service to succeed.

The words and images in the concept must match. Neither practitioners nor academicians can agree on whether a concept should be presented in a simple, white-board format or in a more embellished format, with pictures and language that more closely resemble a print ad. However, most can agree that the "wrong" picture can do more harm to a concept than good.

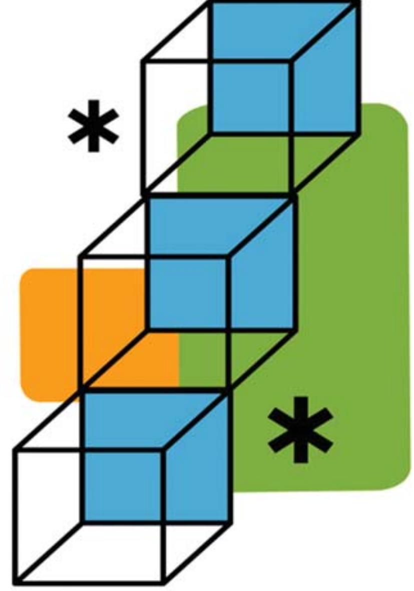
Too often, the concept and its associated visual evolve on different timing, so when the "final" concept is pulled together a mismatch occurs. This is particularly true when a written concept is properly developed qualitatively and a picture is slapped onto the concept prior to a quantitative test (only reviewed by management, not consumers). When consumers look at a picture and it doesn't match the expectation created in the text, they generally become reflexive concept rejectors, slamming the final concept on believability, purchase intent or product/concept fit.

It is imperative to qualitatively check how consumers perceive the fit of the picture with the written concept. This simple check can avoid making a costly misstep in an expensive quantitative test of the concept.

Make the difference

Although concept development is both an art and a science, developing and utilizing strong concept-writing and marketing skills can make the difference in creating successful expressions of your ideas. You can save time, money and effort when your team is able to craft ideas that outwit, outlast and outplay the competition. The result: winning concepts that your consumers will love! | Q

The power of three



By Neil Kalt

The overriding objective of most taste tests is to determine the comparative appeal of each product. Toward this end, the standard taste test presents two products with all signs of brand identity removed and controls for order effects by rotating the order of presentation. If assessing the impact of the brands is also an objective, respondents are asked to compare the two products a second time, only this time with the products branded.

While this design is unquestionably serviceable, there are things we can do to make it better:

1. We can increase the power of the design, which is the ability to detect a statistically significant difference when one exists. When we increase the power of the design, we're also able to determine with considerable precision how noticeable the difference between the two products being tested is. The less noticeable it is, the more likely the brands are to drive product preferences. The more noticeable it is, the more likely the unbranded products are to determine product preferences.

2. We can use an explanatory framework that's defined by the power of the brand - which is the extent to which the brands determine product preferences - and by the power of the formula - which is the extent to which product preferences are driven by the unbranded products.

A look at the power of the design, the formula and the brand in taste testing

Because power is a zero-sum proposition for any one product, the power of a product's brand and the power of its formula are inextricably linked, the two interlocking parts of a whole. That is, within the context of a head-to-head comparison of two products, the greater the power of a product's brand, the less the power of its formula. Conversely, the greater the power of a product's formula, the less power its brand has.

An explanatory framework that's defined by the power of the brand and the power of the formula provides perspectives - or ways of looking at and thinking about the issues - that yield valuable insights. For example, this framework led to an unusual test of the power of each brand in which the formula is held constant (see below).

When two products are compared, the power of each product's brand and each product's formula are the result of this particular compar-

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ison, and may be substantially different when either of these products is compared to another product. Still, getting a sense of the power of a product's brand and the power of its formula when it's compared to a key competitor can provide fresh insights into the reasons for its performance, insights that can make a difference in how effectively the product is marketed.

Table 1: A Comparison of the Standard Design and the Proposed Design

	Standard Design		Proposed Design	
	Brand A	Brand B	Brand A	Brand B
Product-based preferences	42%	28%	42%	28%
Noise: order of presentation	10%	10%	10%	10%
Noise: both samples the same	5%	5%	5%	5%
Observed preferences	**57%**	**43%**	**60%**	**40%**

Three trials

Let's look at a hypothetical example. Say that we want to find out how Pepsi stacks up against Coke. We begin by taking respondents through three trials in which the samples they're given are not brand-identified. They are simply told that they'll be sampling two colas in each trial.

In the first trial, respondents either sample Pepsi, then Coke, or Coke, then Pepsi. In the second trial, the order in which the two products were presented in the first trial is reversed. In the third trial, half sample Pepsi twice and half sample Coke twice. In a fourth trial, respondents compare Pepsi and Coke with the brands identified. Each respondent either drinks Pepsi first and Coke second, or Coke first and Pepsi second.

At the end of each trial, respondents indicate whether they prefer the first sample or the second, or whether they have no preference. Their choices, based on some combination of brand and formula, provide the baseline for the power of the formula and, to an extent, the power of the brand.

Order of presentation

The preceding design enables us to identify respondents whose preferences are governed by the order of presentation and/or who express a preference when the correct answer is "no preference." As a result, we're able to exclude these respondents from the analysis, which can increase the power of the design by increasing the ability of the statistical test we use to detect a difference when one exists. Let me explain.

The shortcomings of the standard design can result in a considerable amount of "noise." Noise is data that make it more difficult to detect a significant difference when one exists. In the standard design, there are two sources of noise:

1. Respondents who make choices based on the order of presentation rather than on the differences between the products - that is, respondents who prefer different products on the first two trials.

2. Respondents who express a preference when they're given two samples of the same product on the third trial.

The standard design, which is unable to distinguish between preferences based on the products and preferences based on the order in which they're presented, rotates the order of presentation in order to control for its effects. Unfortunately, rotating the order of presentation doesn't eliminate any of the noise from the analysis. Rather, it apportions roughly equal amounts to each cell ("prefer product A" and "prefer product B"), which makes it harder to detect a statistically significant difference when one exists. When the difference between the two products being tested is sizable, the amount of noise is likely to be negligible or nonexistent. However, when the difference between the two products being tested is small, the amount of noise can be considerable.

To make matters worse, the standard design can't identify, and so has no way of dealing with, respondents who express a preference when they're given two samples of the same product. As a result, these people are treated as if their preferences are driven by differences between the products. The result is more noise.

To illustrate the difference that the proposed design can make, let's look at two scenarios (Table 1). In each, the preferences of 70 percent of the respondents are driven by the differences between the two products being tested. Another 20 percent make choices based on the order of presentation, and 10 percent express a preference - divided equally between the two brands[1] - when they're given two samples of the same product. Among respondents whose preferences are governed by the differences between the two products being tested, 60 percent prefer Brand A. In the first scenario, the standard design is used. In the second scenario, the proposed design is used. Let's look at the numbers.

The proposed design is able to identify and remove from the analysis respondents whose choices are determined by the order of presentation and respondents who express a preference when presented with two samples of the same product. As a result, observed levels of preference are 60 percent and 40 percent - the difference is 20 percent. In contrast, the standard design is unable to weed out the noise that's generated by these two sources, which narrows the difference between the observed percentage that prefer Brand A and the observed percentage that prefer Brand B to 14 percent, making it more difficult to detect a statistically-significant difference when one exists.

However, the proposed design pays a price for excluding noise from the analysis. That price is a smaller sample size. For example, if both designs begin with 200 respondents, the standard design would use the entire sample to determine if the difference between 57 percent and 43 percent is significant. In contrast, the proposed design would base its comparison of 60 percent and 40 percent on a sample of 140. Since power is, in part, a function of sample size, this design loses some of its power. Indeed, the smaller the sample when the study begins and the larger the percentage of respondents that is excluded from the analysis, the less power the proposed design will have.

If a substantial percentage of respondents are excluded from the analysis, say at least 60 percent, then the difference between the two products is likely to be too small to be reliably detected, regardless of the design that's used - which is valuable information, and the reason why the ability to measure the amount of noise is an important benefit of the proposed design. Because it's able to identify the extent to which noise is produced, this design is able to tell us with considerable precision how noticeable the difference between the two products being tested is. The larger the sum of the following four percentages, the less noticeable this difference is likely to be:

- The percentage of respondents whose choices are governed by the order of presentation but who don't express a preference when the two samples are the same.
- The percentage of respondents that express a preference when the two samples are the same but whose choices are not governed by the order of presentation.
- The percentage of respondents whose choices are governed by the order of presentation and who express a preference when the two samples are the same.
- The percentage of respondents that have no preference.

Going back to our hypothetical example, when respondents sampled branded Pepsi and branded Coke on the fourth trial, let's say that 45 percent preferred Pepsi, 45 percent preferred Coke, and 10 percent had no preference. When these beverages are unbranded, let's say that 50 percent preferred Pepsi, 30 percent preferred Coke, 10 percent had no preference, and 10 percent made choices based on the order in which the products were presented and/or expressed a preference when both samples were the same. If we exclude this 10 percent from the analysis, along with the 10 percent who had no preference, we find that 63 percent preferred Pepsi and 38 percent preferred Coke. In a head-to-head comparison, these findings tell us several important things about Coke and Pepsi:

- The Pepsi formula has more power than the Coke formula.
- The Pepsi formula has more power than the Pepsi brand.
- The Coke brand has more power than the Coke formula.

As noted above, the larger the percentage of respondents that is excluded from the analysis, the less noticeable the difference between the two products is likely to be. Consequently, the less power either formula is likely to have. In our example, 20 percent were excluded from the analysis. Had it been 80 percent, we would be forced to conclude that most of the expressed preferences when respondents compared branded Pepsi to branded Coke were driven by the power of the brands.

At this point, we know all that we're going to about the power of the formula. However, we can learn more about the power of each brand by conducting another test with a fresh sample of respondents.

Formula constant

This test is conducted by holding the formula constant and varying the brand, which enables us to determine the power of each brand when there is no difference between the formulas. There are four trials, with each respondent randomly assigned to one of these trials and participating only in that trial:

1. In the first trial, respondents sample Pepsi twice, but are told that the first sample is Pepsi and the second is Coke.
2. In the second trial, respondents sample Pepsi twice, but are told that the first sample is Coke and the second is Pepsi.
3. In the third trial, respondents sample Coke twice, but are told that the first sample is Pepsi and the second is Coke.
4. In the fourth trial, respondents sample Coke twice, but are told that the first sample is Coke and the second is Pepsi.

The benchmark to which these preferences are compared is 0 percent. We use 0 percent because each brand has to overcome the absence of a difference between formulas, making this an unusually demanding test. The upper limit of this range is the percentage that preferred each of these brands when respondents sampled branded Pepsi and branded Coke. Using this test, the closer the preferences for a product come to this upper limit, the more power the brand for that product has.

Fresh insights

In conclusion, the information that these tests yield about the power of a product's formula and the power of its brand in head-to-head competition with a key competitor can provide fresh insights into the reasons for its performance, insights that can make a considerable difference in how effectively the product is marketed. |Q

[1]Although we would expect these choices to divide equally, that won't always be the case. When it's not, it will erroneously narrow or widen the gap between the products being tested.

continued from page 8

feel more responsible for environmental problems than those in developed countries, and six in 10 people in developing countries report that environmental problems are negatively affecting their health - twice as many as in most developed countries. Moreover, consumers in developing countries feel strongest that global warming will worsen their way of life in their lifetime, are the most engaged when it comes to talking and listening about the environment, feel the most guilt about their environmental impact and are willing to do the most to minimize that impact.

Their behavior reflects their concern. People in developing countries are more likely to live in smaller residences; prefer green products and own relatively few appliances or expensive electronic devices; walk, cycle or use public transportation and choose to live close to their most common destination. By contrast, consumers in developed countries, who have more environmentally-friendly options to choose from, often don't make those choices. They have larger homes and are more likely to have air-conditioning; own more cars, drive alone most frequently and use public transport infrequently; and are least-likely to buy environmentally-friendly products and to avoid environmentally-unfriendly products. U.S. consumers scored worse than those in any other country, developing or developed, on housing, transportation and goods. They are, by far, the least-likely to use public transportation, walk or bike to their destinations or to eat locally-grown foods. They have among the largest average residence size in the survey. Only 15 percent say they minimize their use of fresh water. For more information visit www.globescan.com.

Money is no object for LOHAS consumers

Compared to other consumers, LOHAS (Lifestyles of Health and Sustainability) consumers are the top spenders in many consumer packaged goods (CPG) categories offering a higher development of organic, natural or environmentally-friendly options, such as produce, cereal, soup, eggs, pasta, nuts and light bulbs. Eighty-one percent of LOHAS households purchase products labeled as organic, spending nearly four times as much as unconcerned consumers (consumers not on the eco-radar), according to research from New York researcher The Nielsen Company and Harleyville, Pa., research company the Natural Marketing Institute (NMI). Nielsen and NMI's analysis shows that LOHAS consumers also show their commitment to a healthy, sustainable lifestyle through their purchases of products with health claims, such as gluten-free, multi-grain and probiotic. For example, LOHAS consumers spend more than twice as much on sprouted grain and GMO-free (genetically-modified organisms) products.

Opportunities for CPG manufacturers and retailers seeking to capture the LOHAS consumer wallet include non-carbonated soft drinks, baking mixes and indulgences, such as frozen novelties and syrups. NMI estimates U.S. LOHAS products to be a $209 billion industry, and projects U.S. sales of LOHAS products to be more than $400 billion by 2010. "One in five U.S. consumers are LOHAS consumers - passionate, environmental, socially-responsible stewards," says Patti Marshman-Goldblatt, senior vice president, NMI. "These consumers are early adopters, loyal to companies whose values match their own and, validated by our research, willing to put their money where their mouths are."

There are also significant differences in store choice between LOHAS and non-green consumers. Compared to conventional consumers (a segment of the population driven to environmental sustainability by traditional means, such as cost savings), LOHAS consumers spend 10 percent more in warehouse clubs than other channels, such as grocery stores, drug stores or supercenters. Naturalites (health-motivated consumers) and unconcerned consumers tend to shop in lower-cost channels, such as supercenters and dollar stores, each segment spending 43 percent more in supercenters than expected. LOHAS consumers also spend more than non-green consumers in virtually every department of the store, with the exception of the meat department, which is perhaps a reflection of vegetarian lifestyles. For more information visit www.nielsen.com.

Hispanics back up their environmental views with action

Hispanics worldwide may be the most receptive to green marketing and the most willing to modify their behavior to benefit the environment. The Green Life, a study from New York research company TNS North America, explores the different lifestyles, attitudes and behaviors of consumers and explores the steps they are willing to take to become more environmentally friendly. Eight different segments were identified, and the Respectful Stewards (Madre de Tierra Verde), the segment most heavily-populated with Hispanic respondents (86 percent), comprised 7 percent of the consumers surveyed and stood out as an excellent target for promoting green.

Though lower-income and living in large urban households, respondents in this segment were willing to pay more for environmentally-friendly products; were twice as likely to be influenced in their day-to-day purchasing decisions by environmental issues than the general U.S. population; and, when asked about the environment, Earth and nature, had a distinct emphasis on deforestation, water pollution and fouling of the Earth, while most other groups only emphasized overdevelopment.

In global results, the Latin American countries surveyed trended with the U.S.-based Hispanics. A comparison of the 17 countries represented in the research found that the Latin American countries (Mexico, Brazil and Argentina) scored overwhelmingly higher in their concern for the environment when compared to the rest of the world.

When compared specifically to the United States, the key findings were as follows: more than 60 percent of Latin Americans polled said they have changed their behavior significantly to benefit the environment, compared with only 36 percent of Americans;


Sampling
That's Smart

Latin Americans purchase decisions are more highly influenced by a product's green credentials at 62 percent compared to U.S. consumers at only 26 percent; and similar results were found where Latin Americans were influenced by companies that have environmentally-friendly reputations at 53 percent versus 19 percent for the U.S. For more information visit www.tnsglobal.com.

Americans tripped up by eco-semantics

Americans are misunderstanding key phrases commonly used in environmental marketing and advertising, giving products a greater environmental halo than they deserve and creating a growing risk of backlash, according to findings from the 2008 Green Gap Survey, conducted by Boston research company Cone LLC and the Boston College Center for Corporate Citizenship.

Almost four in 10 Americans are preferentially buying products they believe to be environmentally friendly. At the same time, 48 percent of the population erroneously believes a product marketed as "green" or "environmentally friendly" has a positive (i.e., beneficial) impact on the environment. Only 22 percent understand that these terms more accurately describe products with less negative environmental impact than previous versions or competing products.

The survey shows that Americans do not realize this green gap exists. Forty-seven percent trust companies to tell them the truth in environmental messaging, and 45 percent believe companies are accurately communicating information about their impact on the environment. Sixty-one percent of Americans say they understand the environmental terms companies use in their advertising.

"The gap creates significant risk of embarrassment for companies and disillusionment for consumers," says Mike Lawrence, executive vice president, corporate responsibility, Cone LLC. "Activists are closely monitoring green claims and can quickly share information online about the actual environmental impact of a product. The result can be accusations that a company is engaging in greenwashing and is misleading the public."

Despite not recognizing the existing green gap, 59 percent of Americans support a move by the government to ensure the accuracy of environmental messaging by regulating it. In addition to government, Americans believe other entities can play an important oversight role to ensure accuracy in environmental messaging: certification by third-party organizations (80 percent); review and reporting by watchdog groups, news media, bloggers, etc. (78 percent); regulation by government (76 percent); and self-policing by industry or business groups (75 percent).

"The fact that Americans are so primed to trust companies may suggest the lack of control they feel around complex environmental issues, so it is not surprising that they also seek a third-party gatekeeper to help ensure the messages they see and hear are accurate," says Bradley Googins, executive director, the Boston College Center for Corporate Citizenship. "The motto really could be 'trust, but verify.' Maintaining the trust of consumers needs to be a top priority for companies."

People are listening to, interested in and positively affected by environmental messaging. Thirty-eight percent say they feel informed by such messaging, and another 11 percent feel empowered or inspired to act. Only 14 percent of the population says environmental messaging makes them either feel cynical or overwhelmed. For more information visit www.coneinc.com.

High recall for eco advertising, but consumers not convinced

Consumer recall of advertising with green messaging is very high, with 37.1 percent of consumers saying they frequently recall green messaging and an additional third recalling it occasionally, according to a study from Burlington, Mass., research company Burst Media. Over 65 percent of respondents say they sometimes believe green claims made in advertisements, and 12.1 percent say they always believe green advertising claims. However, it's not all good news as the survey found that 22.7 percent respondents say they seldom or never believe green claims made in advertisements.

Forty-one percent of consumers frequently or occasionally research the claims made in green advertisements, and 30.1 percent refrain from any further research. The survey found that four out of five (79.6 percent) respondents use the Internet to conduct personal research on green initiatives and products.

Many respondents find the availability of corporate information on green and environmentally-safe products and services lacking, as 41.6 percent would rate corporate information as only average; 20.8 say fair and 17.2 percent say poor.

More than four out of five (81.9 percent) respondents have incorporated some level of green activity into their lives (only 12.9 percent are not green at all). Although most respondents have integrated green activity into their daily lives, only 5.2 percent are completely green. Most respondents (43.9 percent) are "aspirationally" green and incorporate a few things that are green into their daily lives but have a long way to go. Another 38 percent attempt to be as green as possible, but not 100 percent.

Respondents most frequently cite "good for the environment" as the reason they include green behavior in their daily lives. Other reasons cited for going green include: to impact the future, to live a better quality of life, good for the community, desire to make a difference, desire for a healthy body and desire to live simply and use less.

Survey data showed that the most popular online green content is recycling information and healthy recipes. These are followed by information on alternative energy sources, natural remedies, eco-friendly cleaning products, green technologies, nature/outdoor recreation, tips for simple living, gardening/organic gardening and organic foods. For more information visit www.burstmedia.com.

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features directly on the map.

The enhancements supporting PDF in ArcGIS 9.3 will be available as a free download for ArcGIS Desktop, ArcGIS Server and ArcGIS Engine. For more information visit www.esri.com/whatscoming.

Finally, street datasets have been updated in RouteMAP IMS 4.0, ESRI's program designed to integrate mapping, routing and driving directions with any Web site. The latest release of this data pack, Tele Atlas' Dynamap Transportation, includes current street data, postal boundaries, landmarks and water features for the United States, Canada and Puerto Rico.

RouteMAP IMS is designed to generate more business activity by allowing prospective customers visiting Web sites to create maps and calculate driving directions to various business locations. RouteMAP IMS includes map templates to create maps with symbols for unique company locations. Clients can also create customized maps with ActiveX, Java and .NET application programming interfaces (provided with RouteMAP IMS). For more information visit www.esri.com/routemapims.

ComScore adds online and offline media planning tool

Reston, Va., research company comScore Inc. has added Acxiom's PersonicX segments to the comScore Segment Metrix service for the U.S. market. The new offering is targeted at advertising agencies and marketers seeking higher-performing online media plans.

PersonicX is a household-level segmentation system that groups consumers into 70 different life stage-based segments based on several demographic variables. Predictive of U.S. consumer behaviors, media preferences, shopping patterns and financial needs, PersonicX is designed to target more specific segments in an offline environment than is possible using simple age breaks. ComScore Segment Metrix – PersonicX is designed to enable marketers to reach these segments via online as well as offline media. For more information visit www.comscore.com.

Maktoob expands consumer communications services

Maktoob Research, Dubai, United Arab Emirates, has launched two initiatives in consumer communications: Online Research Communities, an online community-building tool, and Mobile Research, an SMS-based research initiative.

The Online Research Community initiative is designed to create customized virtual consumer societies that provide companies immediate access to product feedback.

The Mobile Research initiative is designed to allow clients to receive responses for targeted queries. An SMS invite with a WAP link to a short survey is sent to pre-targeted mobile users, who then reply with their responses. For more information visit www.maktoob-research.com.

Confirmit updates CAPI survey tool

Oslo, Norway, research software company Confirmit has released Confirmit 12.5. Confirmit 12.5 is designed to deploy long and complex surveys faster and more efficiently. A key enhancement to the Confirmit platform comes within the CAPI (computer-assisted personal interviewing) function. A range of developments within this area are intended to assist interviewers in improving the speed with which they can complete survey assignments.

In addition to the CAPI enhancements, Confirmit 12.5 features the initial version of a new database format that serves as the foundation for the data collection platform that will be introduced in the next version of Confirmit. This database format provides scalability and stores multiple surveys in a single survey database. For more information visit www.confirmit.com.

Northern Light connects with Web 2.0

Cambridge, Mass., research company Northern Light has introduced a series of Web 2.0 capabilities for its SinglePoint enterprise market research portals. The new capabilities, known collectively as SinglePoint Connects, are designed to enable users to collaborate online within the portal environment; find, annotate and share documents in a single user interface; and enforce the business and copyright rules on document dissemination.

SinglePoint also features MI Analyst, a meaning-extraction application designed for market intelligence, market research and product research. SinglePoint Connects is available for addition as an option to SinglePoint market research portals. For more information visit www.northernlight.com.

Ipsos launches two new tools, updates another

Research company Ipsos ASI, Toronto, has introduced Next*360 and CampaignLab, two new tools designed to help marketers assess the potential impact of their advertising and communications campaigns. The tools have been designed to evaluate and optimize multimedia communications prior to final execution.

Next*360 is a flexible copy testing tool that quantitatively evaluates the strength of a campaign across media touchpoints. The tool tests the campaign messages with online audiences in various combinations and media in context, assessing the strength, reach, persuasive potential and emotional response. The campaign in its entirety, as well as the contribution of each individual touchpoint, can be evaluated.

CampaignLab is a quali-quant tool that focuses on providing an early read on a campaign's overall potential for success and a qualitative component that studies consumer insights. The product was developed and is delivered in conjunction with Ipsos Camelford Graham, a specialty unit of Ipsos in North America that focuses on qualitative research. For more information visit www.ipsos.ca.

Separately, New York research company Ipsos Public Affairs has updated its omnibus service to include Ipsos Hispanic Express Omnibus, a Spanish-language version designed to help consumer-product

companies, governments and corporations understand the needs and opinions of the Hispanic market. The survey is designed to allow clients to evaluate customer service and attitudes, measure issue awareness, test advertising effectiveness and profile customer relationships. For more information visit www.ipsospa.com.

Two new research facilities in Europe

EMS Research, London, has launched two new research studios in central Berlin, as well as an extension of its European CATI center that will focus on the whole of Europe, including Central and Eastern European countries. The focus group facilities include specialist recruitment, moderation/interviewing and simultaneous translation capabilities. The facilities offer seating for up to 12 respondents, viewing for six clients, Web streaming, boardroom or consumer set-up, digital audio/video, European CATI, a 100-seat call center with multilingual and native staff, central management by local multilingual project managers, digital recording of interviews and monitoring and quality control procedures. For more information visit www.emsresearch.org.

Briefly

New York researcher The Nielsen Company has debuted Nielsen Answers' Retail Edition, the first edition of Nielsen's platform designed for retailers. The Retail Edition is designed to help retail companies simplify the process of gaining insights to meet key business challenges such as determining the right assortment of merchandise to carry; measuring store-level, competitive and market performance; post-promotion assessment; and competitive market pricing. For more information visit www.nielsen.com.

Des Moines, Iowa, research firm iEmergent has introduced its FHA Purchase Forecast tool to help advise lenders on where FHA lending is likely to increase rapidly, forecast the size of the FHA lending opportunities and project future FHA growth. IEmergent's FHA Purchase Forecast is available for all geographic markets and contains purchase mortgage conversion rates, sizes of total FHA purchase lending opportunities, FHA mortgage density and projections of future FHA mortgage growth speeds for each geographic market. For more information visit www.iemergent.com.

San Mateo, Calif., research company WWMR Inc. has launched its new Web site, www.wwmr.com, which features over 25 research case study summaries. The custom projects section of the Web site lists appropriate types of marketing research for each stage of drug development. Attached to each type of research project is a document describing the challenge, solution and impact for one or more projects. Specifics include descriptions of the scenario, objectives and special challenges of the research, as well as the methodology and deliverables. For more information visit www.wwmr.com.

Nashville, Tenn., research company edo Interactive has launched the edo Marketing Platform, a Web-based marketing platform designed to aid businesses, motivate consumers and allow advertisers focused on measuring ROI to have access to big-business marketing tools.

The edo Marketing Platform can be used to collect edoMarketIQ (market intelligence) by incentivizing target groups to submit responses to various polling or survey questions. The edo Marketing Platform executes through the existing financial network merchants currently use to process their customers' debit and credit card transactions. For more information visit www.edointeractive.com.

Toronto-based quality assurance and research supplier Sensors Quality Management has launched MyShop, an online mystery shopping tool aimed at small and medium-sized businesses. The product uses a library of standard questions to allow clients to set up an evaluation form online. For more information visit www.sqm.ca.

Staines, U.K., research company OnePoint Surveys has partnered with research agency Dipsticks Research, Northumberland, U.K., to launch OmNow, a mobile omnibus to deliver results within four hours, provide real-time access to survey responses and use both SMS and WAP mobile phone technology.

OmNow results can be viewed, downloaded and exported in real time, through a secure Web portal, aiding project turnaround times. Surveys offer open-ended questions and visual stimulus in addition to traditional closed-ended questions that are the trademark of SMS only delivery. For more information visit www.omnow.co.uk.

Chatham, N.J., research company Theorem Inc. has upgraded its software-as-a-service program, Theorem Analytics 2.0, a tool designed to allow media planners, advertising operations teams and finance managers to upload data and generate reports in multiple forms (HTML, Adobe, Excel, Microsoft Office formats, etc.) through customizable templates and formulas.

The tool draws in data from ad servers, search engines, site side data, rich media and traditional marketing sources. Theorem claims it can shorten reporting schedules from three weeks to three days. For more information visit www.theoreminc.net.

20/20 Research Inc., Nashville, Tenn., has launched Qualboard version 2.1, which is designed to allow research study participants to upload video clips more easily. Qualboard is designed for researchers to gather input from study participants regardless of geography or time of day. Study participants can respond to questions posted by a moderator and comments posted by other participants. This online qualitative research is suited for ongoing product usage studies, for highly-specialized audiences and for topics that are sensitive or very personal in nature. For more information visit www.2020research.com.

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comScore post-acquisition.

Research firm **MedData**, a division of Agdata, Charlotte, N.C., has acquired analytics firm **ManagedCare.com**.

Common Knowledge Research Services, Dallas, has been acquired by European panel and survey technology provider **Toluna PLC**, based in the U.K.

Wilton, Conn., research company **Greenfield Online Inc.** has entered into an agreement to be acquired by an entity affiliated with Quadrangle Group LLC, a New York private investment firm. Under the terms of the merger agreement, Quadrangle will acquire all of the outstanding common stock of Greenfield Online Inc. for approximately $426 million.

Waltham, Mass., research company **Decision Resources Inc.** has acquired **Manhattan Research**, New York. The acquisition of Manhattan Research is expected to provide access to physician and consumer opinions on the global health care market.

Alliances/strategic partnerships

Saskatoon, Saskatchewan, research company **Itracks** has partnered with **GroupNet**, a joint venture of independently-owned and -operated qualitative research facilities and support services in the U.S. Itracks' online qualitative research tools will supplement GroupNet's facilities.

Phoenix research company **MultiMedia Intelligence** has partnered with Dublin, Ireland, credit information company **Experian** to deliver market segmentation, insights and forecasts based on combined supply-side and demand-side views of the markets.

Charleston, S.C., architectural firm **RhodesDahl** has formed a strategic partnership with **Impacts Research & Development** to provide predictive intelligence and market research to its clients.

New York research company **Ipsos Interactive Services U.S**. and San Francisco research company **Peanut Labs** have formed a multiyear research alliance to enhance market research interaction with 13-34-year-olds who are active on social networks. The collaboration will couple Ipsos' experience with Peanut Labs' Sample3.0 technology to help recruit and maintain younger populations on Ipsos panels in the U.S. and Canada.

New York research company **TNS** and **Information Resources Inc.** (IRI), Chicago, have partnered to help consumer packaged goods and retail executives better understand the green market. IRI will integrate TNS' Shades of Green segmentation methodology into IRI's Consumer Network Household Panel.

East Greenbush, N.Y., data management firm **I-Centrix** has partnered with London marketing software firm **smartFOCUS** to offer clients access to campaign management, analysis and reporting capabilities.

Association/organization news

Marketing Research Association (MRA), Glastonbury, Conn., has honored four market researchers with national awards: Richard Rands has received the Honorary Lifetime Membership Award; Merrill Dubrow and Steven Schlesinger, the Distinguished Service Award; and Merrill Shugoll, the Award of Excellence.

In addition, MRA has introduced PRC 2.0, a revision of the Professional Researcher Certification program, which is intended to recognize the qualifications and expertise of marketing and opinion research professionals.

Specific enhancements of PRC 2.0 include: PRCs have been transferred from a specific job category to a broad certification classification; PRCs can submit their education and update personal information online; and PRCs can select any education topic to fulfill their education requirements within three categories: business, research and legal (conferences, chapter events, online courses and writing research-related articles also qualify for PRC credits).

Other program highlights include: flexible education requirements, a simplified classification structure, increased recognition for PRCs, a new PRC Web site and open enrollment through December 31, 2008. During open enrollment, industry professionals can apply for PRC without having to take an exam. To apply visit www.mra-net.org/prc.

Finally, MRA has named its executive committee and its board of directors. The executive committee includes: John Last, president; Kim Larson, president elect; Lawrence Brownell, CEO; Steven Schlesinger, secretary; Elisa Galloway, special appointee; Merrill Dubrow, treasurer; and Colleen Moore Mezler, past president.

The board of directors includes: David Ashley, program analyst, Department of Homeland Security; Ginger Blazier, senior vice president, Directions in Research; Elisa Galloway, president, Galloway Research Service; Anne Hedde, president and CEO, Lightspeed Research; Carla Lindemann, COO, Issues and Answers Network Inc.; Bette Anne Champion, senior director, field operations, GfK Strategic Marketing; Jill A. Donahue, manager, Nestle Purina; W. Christopher King, CFO, Sawtooth Software Inc.; Ana Lucia Mendes, project director, Albar Pesquisa de Mercado; Donna Neal, Miller Brewing Company; Marisa Pope, president, Jackson Associates Research Inc.; Kenneth Roberts, president, Cooper Roberts Research Inc.; Amy Shields, vice president, operations, Nichols Research Inc.; Ed Sugar, vice president, On-Line Communications Inc.; and Adam Weinstein, regional sales director, Authentic Response (a division of Return Path).

The **Advertising Research Foundation**, New York, has elected nine members to its board of directors for a three-year term: David Ernst, vice president, digital media and market resources, Discovery Communications; Colleen Fahey Rush, executive vice president, research, MTV Networks; Gian Fulgoni, chairman, comScore; Byron Lewis, chairman and CEO, Uniworld Group; Bob Lord, president, Eastern region, Avenue A and

Razorfish; Mike Pardee, senior vice president, Scripps Networks; Debra Pruent, COO, GfK Custom Research North America; George Shababb, COO, TNS Media Research; and Stan Sthanunathan, vice president, knowledge and insights, The Coca-Cola Company.

Awards/rankings

Humphrey Taylor, chairman of Rochester, N.Y., research company **Harris Interactive**'s The Harris Poll, has received the Outstanding Achievement Award from the New York Chapter of the American Association for Public Opinion Research.

Nuremberg, Germany, research company **GfKNürnberg e.V**. and Holger Dietrich have won the German market research innovation award.

New accounts/projects

Bellevue Radio Inc. has signed a multiyear contract with New York research company **Arbitron Inc.** for Portable People Meter (PPM) radio ratings services for KIXI-AM, KQMV-FM, KKNW-AM, KWJZ-FM and KRWM-FM in Seattle. This agreement will take effect as and when Arbitron commercializes the new audience ratings technology in Seattle.

Arbitron will resume the commercialization of PPM radio ratings service in eight markets: New York, Nassau-Suffolk, Middlesex-Somerset-Union, Los Angeles, Riverside-San Bernardino, Chicago, San Francisco and San Jose. The eight markets will commercialize with the release of the September PPM survey report on October 8, 2008. On that date, the company's diary-based radio ratings will be withdrawn from those eight markets, and radio transactions among Arbitron-subscribing stations and agencies will take place solely using PPM-based radio ratings. Arbitron commercialized the PPM ratings service in Philadelphia in March 2007 and Houston-Galveston in July 2007. In addition, PPM technology is currently being used for radio and/or television measurement in Belgium, Denmark, Norway, Iceland, Kazakhstan, Canada, and Singapore.

Additionally, José López-Varela, chairman of the **Association of Hispanic Advertising Agencies** (AHAA), McLean, Va., has formed the **AHAA Council on PPM**. The Council on PPM is tasked with ensuring that the methodology and design of the Hispanic sample accurately represents the Hispanic population and their listening behavior. Board members include: Isabella Sánchez, vice president and managing director, Tapestry; Gloria Constanza, partner and chief contact strategist, d. Expósito & Partners; Jim Irvine, senior director, media strategies, López Negrete Communications; Tracy Decker, executive vice president and media director, GlobalHue; Tomas Ruiz, director, media buying, Bromley Communications; Nancy Tellet, vice president and director, media and strategic planning, Siboney; Oswald Mendez, managing partner, integrated communications, The Vidal Partnership; Jeanette Millan, activation director, MV 42°; Lula Olmedo, media director, Zubi Advertising; Raul Lopez, president, Phoenix Multicultural; Jeff Lieberman, president, radio division, Entravision; Ceril Shagrin, senior vice president, corporate research, Univision; Belia Jimenez, director, multicultural research, ABC Radio Networks; Kathleen Bohan, vice president, research and marketing, Univision Radio; Pio Ferro, national program director, Spanish Broadcasting System; Stacie de Armas, director, office of multicultural business affairs, Arbitron; and Bob Patchen, CRO, Arbitron.

Montreal research software company **Voxco** announced that Milwaukee research company **Market Probe** will implement Voxco Command Center and the Pronto dialer at three of Market Probe's centers, two located in the U.S. and one in Canada.

New York researcher **The Nielsen Company** has renewed its agreement with Deerfield, Ill., drugstore chain Walgreens through 2013. Under the contract, Nielsen will provide Walgreens with category management, business planning, merchandising services and consumer data and insights, as well as Nielsen Answers Retail Edition, the first edition of Nielsen's custom analytics platform designed for retailers.

Separately, Nielsen has signed a global agreement with Atlanta beverage company The Coca-Cola Company, enabling Nielsen to provide services to Coca-Cola in 70+ countries. Under the agreement, Nielsen will provide Coca-Cola with information and insights on consumer purchase behavior and targeting, product movement, pricing strategy, media spending, television ratings, as well as analytical tools, cross-country reporting, customized research and Nielsen Answers.

Tampa, Fla., research company **TruMedia Technologies Inc.**, which is seeking to create accountability in the out-of-home display industry through its audience measurement solutions, has selected New York public relations agency KCSA Strategic Communications to represent the company.

Switzerland ratings research company **AGB Nielsen** has received the contract to measure the size of TV audiences of the Beijing Olympic Games in 38 countries on five continents. AGB Nielsen will measure audiences in 10 provinces of China, covering a total of 660 million people.

San Francisco research company **Peanut Labs** has formed its Optimus Advisory Board to study the problem of fraudulent online responses in order to create best practices around data quality using digital fingerprinting and other technologies. Inaugural members include: Amy Raihill, consumer insights manager, Shell Lubricants; Artie Bulgrin, senior vice president, research, ESPN; Chuck Miller, general manager, DMS-AOL; Greg Durkin, vice president, research, Warner Bros; Henry Schapiro, vice president, MarketCast; James Mendelsohn, vice president, corporate strategy, Capital One; Josh Chasin, CRO, comScore; Justin Fromm, research director, ABC Television; Kristin Luck, president, Decipher Inc.; Mike Donatello, director, research, USA Today; Patricia Graham, CMO, Knowledge Networks; Patrick Glaser, director, respondent cooperation, CMOR; Rich Ratcliff, executive vice president, Carbonview Research; Ron Gailey, senior vice president and director, research, Washington Mutual; Simon Chadwick, partner, Cambiar; Steve McHugh, senior vice president, Millward Brown; Steve Oi, senior CIM, Kraft Foods.

New companies/new divisions/ relocations/expansions

Vancouver, British Columbia, research consultancy **Angus Reid Strategies** has expanded with a New York office. Tom Neri will serve as executive vice president and managing director.

Nashville, Tenn., research company **edo Interactive** has launched. Edo Interactive will initially offer two products: the edo Marketing Platform and the Facecard Prepaid MasterCard.

Research Now, London, has expanded its online fieldwork team in southern California with the opening of an office in Los Angeles. The office will be led by Tobin Bailey, vice president, client development, West and Central regions.

Boston research company **Kadence** has launched in China with the opening of a Hong Kong office.

Chicago research company **Survey Sampling International** has opened an office in Seoul, South Korea, and appointed Simon (Quan) Zhang to lead it.

Iowa City, Iowa, research company **Kleffmann North America** (KNA) has allotted $300,000 to accommodate expansion over the next three years. The company is seeking a $40,000 forgivable loan from the Iowa Department of Economic Development and $15,000 from Iowa City. KNA plans to remodel its current office, lease approximately 1,700 square feet of space, purchase new computer equipment and coordinate a jobs training program with Kirkwood Community College. KNA plans to employ nine salaried workers and six hourly interviewers in the next three years.

Chicago research company **Synovate** has launched its Customer Experience practice. Synovate Customer Experience includes customer loyalty and employee engagement, performance tracking, mystery shopping, footfall and shopper behavior analysis, automated collection of customer feedback and customer experience management consulting.

Toronto research company **Alliance Data Loyalty Services** has launched Precima, an analytics firm. Precima was formerly the in-house analytics arm of Alliance.

London research company **BrainJuicer Group PLC** has agreed to license its products to Slater Marketing Group, a research firm in Melbourne, Australia. BrainJuicer has also formalized plans to open an office in Switzerland. BrainJuicer has appointed Mark Johnson as the Switzerland manager in order to build on the existing client base in the territory.

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that the market is becoming more channel-agnostic, you need to be able to use the right channel to get the message to the customer. So whether it's e-mail or a traditional mail piece, an online promotion or an in-store program, you really need to understand your customer and research is part of that CRM process.

The other area is strategy. Research professionals, especially those with client-facing responsibilities, are being looked at to interface with an internal or external client and provide solutions to the complex problems that are eating away at the client's core business. In many cases the client really doesn't have a clue about the best way to do it, so the person coming in has to know how to analyze the problem, internalize it and go back and develop a solution and then implement these programs through cross-functional teams. That's a lot to ask of someone but that strategic perspective and presence is becoming more and more critical [for job seekers to have].

Tom Hull, director: The only way to get that kind of experience is to do it, to have trial by fire. Hopefully there is someone who can guide you, who is the right mentor, who can help you drive or lead that type of initiative.

The other thing that we are seeing, with the market getting tighter - and it is a client-driven market at this point - is that clients are demanding more and more from each candidate. Salaries could potentially go lower even for someone with more experience, because there are so many people on the street now, through no fault of their own.

Q: Has the economic downturn impacted the hiring of researchers about the same as other types of professionals? Since marketing and marketing research are often areas that companies look to cut costs in when times are tough, are companies are looking to fill fewer MR positions these days?

Tom Hull: Marc and I struggle with that. Research has been impacted like a lot of industries have been. However, if a research department experiences layoffs, that doesn't mean that they are not going to hire. What tends to happen is they look at their current personnel and spread out responsibilities and if it gets to be too much, they could find themselves needing to bring in someone from outside.

Erika Weinstein: I also think a down market like this is an opportunity for [research companies] to look in-house and say, "How can we improve?" There are a lot of [research companies] that just freeze and hide and wait for things to get better, but then there are some that look at it as an opportunity to gain more business. They say, "How do I clean house and hire better talent?"

Q: Any advice for researchers who may be looking for a new opportunity?

Marc Rentzer: On the research vendor side, the more client-facing you are, the more you are going to make. If you don't have sales experience, get it. Don't hide in the back room. Get out there with the clients; you'll be of more value to everybody.

Erika Weinstein: It's hard because typically those who go into research don't have personalities that lend themselves to business development and sales. So it is really over time that someone develops that type of what I would call armor.

I find that most business development people within the MR arena are older. They are more experienced and they have a number of years under their belt doing different kinds of analytics in the back room and have moved themselves up to feel comfortable with the clients. And I wouldn't even say they do a lot of client interfacing - it's more showing them what they know.

Tom Hull: If it's not going to be the sales route or the consultative route, there are different ways that a research professional can impact a business. And the more that they are able to speak to impacting that business through quantifiable results, the more they benefit. If it's an initiative that was income–saving or one that they implemented that was able to increase workflow - things like that that go to the bottom line - those things show their value to the business.

Marc Rentzer: That's what our clients want to see on résumés: results. How did you impact the business?

Q: So, with companies beefing up their analytics capabilities and wanting to find out more and more about their customers, is this a good time to be a researcher?

Marc Rentzer: It's certainly gotten sexier. Marketing research has a completely different image nowadays.

Tom Hull: Especially with the prevalence of companies going toward a data-driven business, people are looking at data as a center of excellence for the whole organization. If you can position yourself, not necessarily as market research but perhaps market intelligence, as the one who is going to be behind all of the initiatives as they relate to marketing, that's pretty impressive. That's not an adjunct piece of the business, it's a core offering. |Q trade talk

By Joseph Rydholm
Quirk's editor

Has research gotten sexier?

In conjunction with this issue's focus on research education, training and employment, I had a brief phone chat with Erika Weinstein, Marc Rentzer and Tom Hull of Stephen-Bradford Search, a New York executive-search firm that has marketing research placements (client- side and research vendor-side) as one of its areas of specialization, for a look at the current state of hiring in the MR field.

As with many industries, the ranks of unemployed researchers have grown lately, meaning there is fierce competition for the open positions that are out there. Still, as I learned in my conversation, researchers with the right skill sets (got sales experience?) may be able to pick and choose. And as companies focus on data analysis and data gathering as drivers of growth, are researchers suddenly gaining a little sex appeal in the eyes of corporate America?

Q: What are some of the trends you are seeing in MR hiring?

Marc Rentzer, director: Advanced analytics professionals [at research companies] have added more client-facing duties in the last few years, so there is a huge demand right now for people like that. I have one [research company] client who has a marketing science staff of exclusively client-facing individuals - that is really unusual.

The reason this is a trend is that this is what the end users, the client side, has been responding to the most. They want to work with people like that. They want them in the process early, helping to conceptualize what the research should look like, speaking to them throughout the process and at the end as well to give strategic advice. The [research] companies that are doing this the best have a huge competitive advantage because this is what the clients want.

I think the job candidates are aware of this because their salaries have jumped. If they are very analytic, can do things like structural equation modeling and market mix modeling, and have client-facing experience, they are very much in demand. Senior-level talent that can bring in business, and can mentor well, and can maybe one day take over the company, those people are hard to find.

Q: Are certain industries showing more interest in adding MR-type positions lately?

Marc Rentzer: One of the things we have seen changing is that a lot of the [client] companies are utilizing data and data analytics and market research as key drivers of business across the enterprise. So [research] is getting executive-level buy-in, it's getting a lot of visibility. More importantly, these companies are putting in place a program that is going to take years to implement. To understand the customer you need to know their behavior, their transaction information, their lifestyles. So companies recognize the need for market research but they are not necessarily bringing those needs in-house. So we see more and more instances where research services organizations are being asked to supplement the clients' internal capabilities.

Erika Weinstein, president: I am working with companies in the digital world, what we call interactive marketing companies, that used to not rely on marketing research. They are now coming to me to help put together internal market research teams.

Q: Have you noticed a change in the types of qualifications or levels of experience that companies are requiring their MR hires to have? Do applicants need more experience in certain areas, different educational backgrounds, etc.?

Marc Rentzer: Well, from a capability perspective there are two things. Client companies are bringing in people to do CRM. With the way

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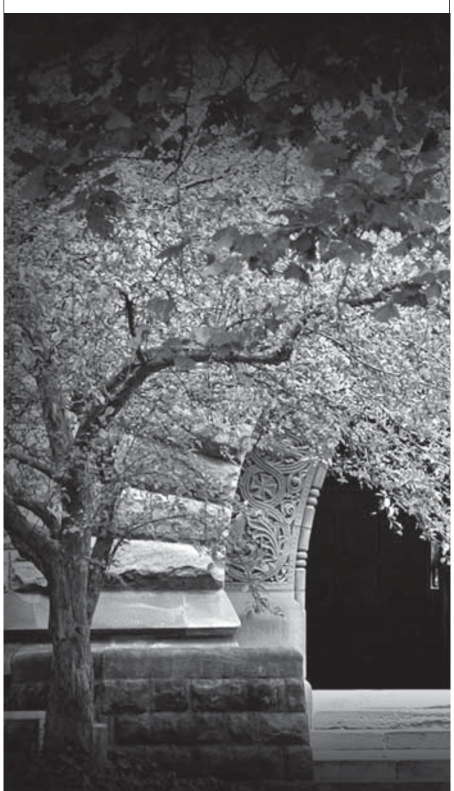

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