QUIRK'S

Marketing Research Review

AUGUST 2009

Green-market survey gets a Web 2.0 makeover

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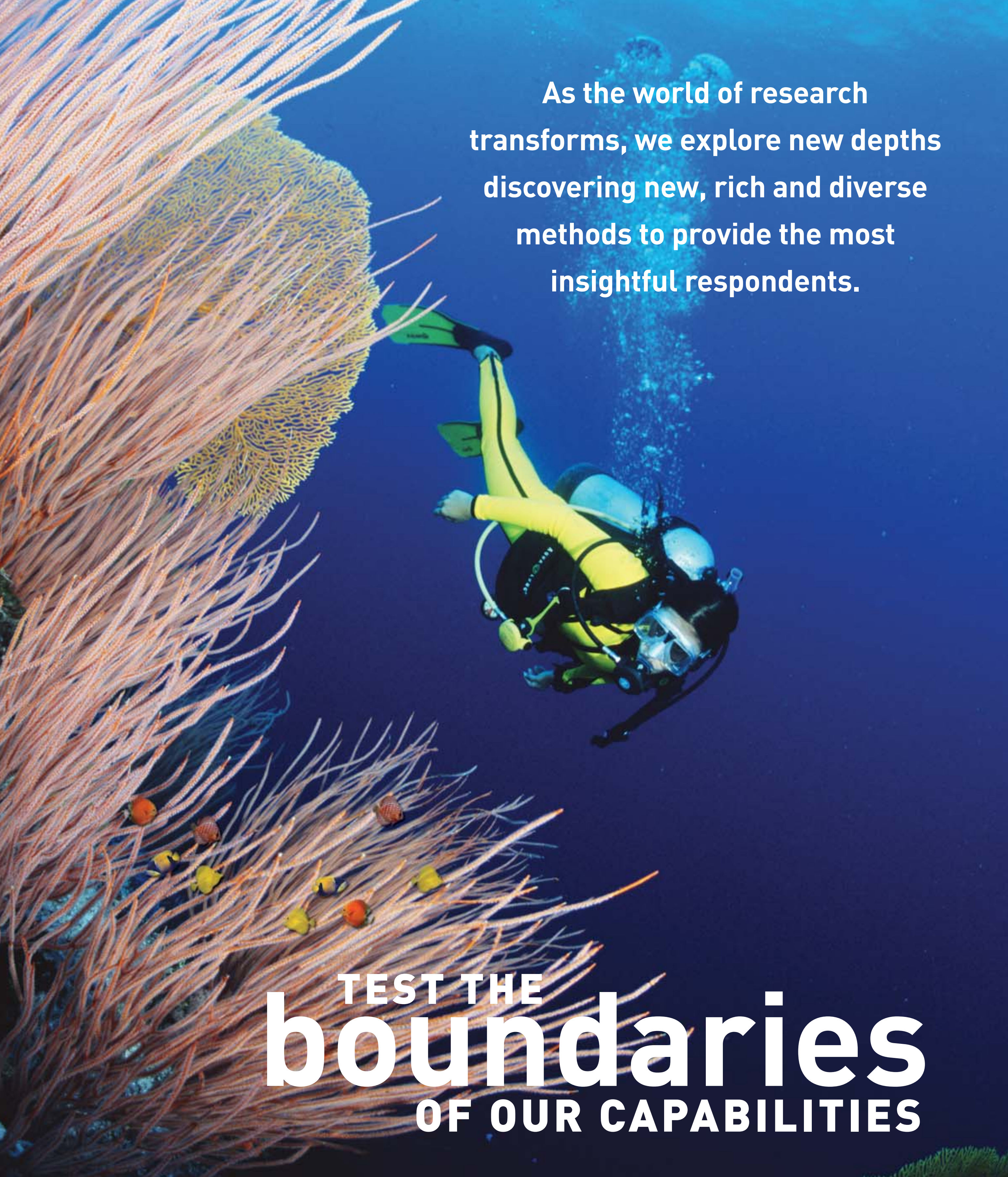
> Finding the ideal researcher


As the world of research transforms, we explore new depths discovering new, rich and diverse methods to provide the most insightful respondents.
TEST THE
boundaries
OF OUR CAPABILITIES

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Volume XXIII Number 8

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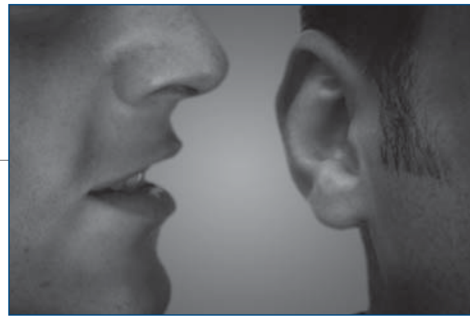

Can Grape Nuts live on advertising alone?

After 111 years of being in production Grape Nuts have fallen on hard times. Marketers at Post Foods are clamoring to restore the gravel-like pellets to their 20th-century glory, according to Barry Newman's June 1, 2009, article "No Grapes, No Nuts, No Market Share: A Venerable Cereal Faces Crunchtime," in *The Wall Street Journal*.

With less than 1 percent share of the U.S. cereal market, the Grape Nuts team has a unique challenge in that the cereal is not all that trendy or tasty, and most Americans would be hard pressed to explain exactly what a grape nut is.

In its naissance the cereal claimed to build brain and nerves and then later to prevent malaria and appendicitis - both false. By 1914, Grape Nuts had cut its curative claims to one: constipation. And from then on advertising focused primarily on establishing Grape Nuts as a hearty man's cereal. The latest Grape Nuts ad campaign, run on MSN's Web site, consists of skits in which timid males get droll advice on looking cool while driving a minivan or letting your in-laws move into your house. The slogan - "That takes Grape Nuts" - implies that the stuff enhances virility.

The campaign targets men 45+ because the cereal is "strong and stern, the father figure of cereals," according to Kelley Peters, insights director of the Grape Nuts comeback.

Grape Nuts has also made nutritional upgrades in an effort to stay relevant as health-consciousness and all-natural claims gain in popularity. The cereal is now whole grain, which qualifies Grape Nuts for food-stamp programs, and includes additional vitamins and minerals.

Rise of the misers: What's your recession-survival M.O.?

A serious recession can bring out penny-pinchers of all shapes and sizes. London ad agency M&C Saatchi's study Reacting to Recession explores the attitudes and behavior adopted by different groups of consumers to find eight consumer typologies with distinct approaches to spending and economizing.

Each typology has adopted a different predominant strategy to cope financially with the downturn:

Crash Dieters (26 percent) aim to shed pounds from their weekly budget by identifying and cutting out all non-essential spending until things improve. This is a heavily cash-oriented group.

Scrimpers (13 percent) are also looking to save but want to maintain their lifestyle and are reluctant to sacrifice. They opt to trade down, not cut out. They are much more likely to substitute brands with private label, rather than dropping them altogether.

Abstainers (15 percent) want to maintain their lifestyle but have postponed big purchases. They are open to anything that allows them to buy now and pay later: interest-free credit, nothing to pay until 2010, 0 percent credit cards and balance transfers are all offers that fall neatly into this camp.

Balancers (9 percent) are reluctant to compromise on quality of life but recognize the need to balance their budgets accordingly. Their approach is therefore to rob Peter to pay Paul. Balancers prefer sacrifice to compromise.

It's not easy for *Treaters* (12 percent) to cut back but they know they have to. So they reward their frugal behavior with regular small treats, presenting an opportunity for businesses that are prepared to think cross-category (i.e., DVD rental and take-out instead of the traditional dinner-and-a-movie date).

Justifiers (12 percent) are happy to spend but, in the current climate, are looking for a good reason to. They're less interested in huge deals but are more motivated by limited offers, new models or added-value deals that help them justify the purchase to themselves.

Ostriches (9 percent) feel unaffected by the financial chill and are spending as normally. They're a younger, more carefree group happy to load up their credit cards. In the short term, they're great for the bottom line, but in the long run, many of them may be forced to raise their heads and lower their spending as the crisis catches up with them.

Vultures (4 percent) love a good economic crash. While others suffer, they're circling Main Street, making a killing on all the bargains. They eye the property market, looking to profit from others' misfortune.

New chatter tool takes WOM to a network level

In the word-of-mouth business, there's no guarantee the people who chatter about the various products and brands they use have nice things to say. But companies want to listen in and customers want to be heard, and that's where BzzAgent comes into play, according to Laurie Burkitt's May 21, 2009, article "The Business of Hype: Word-of-Mouth Marketing Evolution," on Forbes.com. Since 2001 the Boston word-of-mouth marketing firm has tapped 550,000 consumers to test out and talk about products from companies like Philips, Walgreens, Ford, Clorox and Procter & Gamble. These volunteers (bzz agents, in company parlance) sign on for eight-week stints when they are given products to try out and, ideally, tout to their friends. They also provide feedback through BzzAgent to the companies that supply them. When those eight weeks are over, the online chatterboxes move on to new products that BzzAgent helps pitch.

But BzzAgent is finding that eight weeks sometimes just isn't long enough, and consumers can feel abandoned once they lose their direct line to the companies. Their answer? BzzScapes, a social networking site in which online regulars can rant and rave and companies can directly respond back with pictures, comments, coupons and even private conversation.

BzzAgent CEO Dave Balter claims BzzScapes differs from MySpace and Twitter in that it doesn't aim to put users in touch with one another. Instead, users follow and interact with brands, creating brand communities, where they can upload pictures, create links and add video to a brand's profile.

For a monthly fee of $5,000 (or $3,500 a month for a six-month agreement), BzzAgent hands over trend reports and detailed personal profiles of agents. If communities don't grow organically, BzzAgent can also help craft them, first by setting up a profile, then by posting one or two pictures. If brands need help growing their communities, BzzAgent sends out e-mails, inviting a few from its pool of 550,000 volunteers to leave their comments for all to see. For every new person who joins, the company pays BzzAgent $6.

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The global love(/hate) affair with fast food

Across the globe, there's a counter-intuitive trend: Consumers love to indulge in their fast-food cravings but still actively try their hardest to battle their bulging waistlines. An overall 55 percent of people globally say that they eat what they want, when they want, yet 71 percent say they watch their food carefully and strive to be healthy, including 61 percent of Americans (59 percent of American men and 63 percent of American women), according to Chicago research company Synovate's Healthy Living study. The survey also showed that when it comes to food and weight, people are not always logical. It's not uncommon for a person to supersize a meal and then order a diet soft drink to wash it down.

While Americans still like to consume fast food, the U.S. is not necessarily the top fast-food nation. With 68 percent of people agreeing that they like the taste of fast food too much to give it up, Bulgaria easily surpassed the second-place U.S. and U.K. (44 percent each) as having the biggest fast-food junkies. Bulgaria is in the grips of "fast-food passion," says Stoyan Mihaylov, managing director of Synovate in Bulgaria, as Bulgarians still find fast-food chains a novelty and, to some degree, quite trendy, compared to more mature fast-food markets like the U.S. and U.K.

Overall, more than a third of all respondents across the 12 markets surveyed say they like fast food too much to give it up. But many make themselves feel better by paying for their actions in other ways, with 37 percent saying they exercise in order to compensate for other bad habits, including one-quarter of Americans (26 percent).

Twelve percent of Americans weigh themselves every day, more than any other country surveyed. Canada and the Netherlands tied for second place, with 8 percent of people weighing themselves on a daily basis. Even though Americans may have bigger waistlines, they are also the most conscious about it and try catch weight gain right away in order to stop it.

So what strategies do people around the world use to battle their bulges? The top responses across all 12 markets were increase physical activity (45 percent), reduce food intake (41 percent), change types of food eaten (27 percent) and avoid sugar (26 percent). The No. 1 way that Americans respond to weight gain is by reducing food intake, with 55 percent claiming this is their first response, followed by an increase in physical activity (45 percent) and avoiding sugar (23 percent).

The two groups most likely to link food to mood are American and British women. An overall 29 percent of respondents across all 12 markets agreed that they tend to eat junk food when feeling down, comprised of 34 percent women and 24 percent men. This jumped to 55 percent of all British women and 54 percent of their American sisters.

Most people firmly place the responsibility for obesity with the individual. Globally, a quarter of all respondents blame unhealthy food choices and another 23 percent (including 30 percent of Americans) say it's due to unhealthy food habits, like eating at irregular hours. The third-most popular choice was genetics, meaning 18 percent of people globally believe it cannot be helped, while a further 18 percent think obesity is due to lack of exercise. Eleven percent nominated no self-discipline as the reason for the world's growing obesity issues, with more people in the U.K. (19 percent) and the U.S. (17 percent) saying this than anywhere else. For more information visit www.synovate.com.

You can still find teens where they live and breathe: the mall

On a typical visit, 68 percent of teens spend two or more hours at the mall, with more than a quarter (28 percent) spending upwards of three hours, according to research from Columbia, Md., research company Arbitron Inc. and Scarborough Research, New York. While they are at the mall, teens are engaging in a wide variety of activities, which fall into four broad categories: shopping (71 percent), eating (57 percent), socializing (49 percent) and entertainment (40 percent). Ninety-five percent teen shoppers age 12-17 in the U.S. who have visited a mall in the past 30 days say they notice some type of mall advertising. These teens also spend significant amounts of time and money in the mall and are feeling the pinch of the current economic crisis.

In terms of money spent, more than half of teens spent $50 or more on their last visit, while 29 percent spent $100 or more. Though a majority of teen mall shoppers go to the mall the same amount or more than they visited six months ago, many are indeed aware of and concerned about

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names of note

Schwartz Consulting Partners, a Tampa, Fla., research company, has hired **Lorin Drake** as director, quantitative research.

Research International, Chicago, has named **Keith Sutherland** vice president, client services.

Rochester, N.Y., research company *Harris Interactive* has made several appointments: **Berkeley Scott**, senior vice president, global accounts and business development; **Frank Forkin**, president, client services, North America; and **Robert J. Cox**, executive vice president, CFO and treasurer.

Dallas research company *e-Rewards Inc.* has hired **Alexander Hagmeister** as managing director of the German region and **Alki Manias** as senior vice president, sales and business development, of e-Rewards Europe.


Hagmeister Lutfi

Sameh A.M. Lutfi has joined *Maktoob Research*, Dubai, U.A.E., as director, business development.

Rick Wilson has been named COO of *The Dohring Company*, a Glendale, Calif., research company. **Thyra Lees-Smith** has been named vice president, business development.

Columbia, Md., research company *Arbitron Inc.* has elected **Philip Guarascio** as nonexecutive chairman of the board. Additionally, **Deirdre Blackwood** has joined Arbitron as senior vice president, corporate communications.

Vertis Communications, a Baltimore marketing company, has appointed **Carmen Allen** as senior vice president, human resources.

Steve Fleischmann has been named senior vice president, client strategies, of New Hope, Pa., research company *Roger Green and Associates Inc.*


Fleischmann Woerly

Elizabeth Woerly has been promoted to senior analyst of *G&S Research*, Indianapolis.

Norwegian Cruise Line, Miami, has hired **Maria Miller** as senior vice president, marketing. Research will be among her responsibilities.

M/A/R/C Research, Irving, Texas, has promoted **Betsy Sutherland** to general manager of the Greensboro, N.C., office.

London research company *E-Tabs* has made the following appointments: **Paul Williams**, director, sales and business development; **Chuck Bende**, vice president, U.S.; **Bill Billington**, software developer; and **Sam Waugh**, marketing assistant.

EasyInsites, a London research company, has appointed **Simon Chadwick**, **Laurent Florès** and **Ramona Cappello** to its advisory board. Additionally, Chadwick has stepped down from his role as interim CEO of San Francisco research company Peanut Labs.

Ted D'Amico, senior vice president at *Ipsos Mendelsohn*, a New York division of Paris research company Ipsos, has taken on an additional role as chief research officer.

The Modellers, a Salt Lake City research company, has made the following appointments: **Matt Madden**, vice president, analytics; **Eleanor Feit**, vice president, Detroit; **Katy Haberkern-Mogal**, senior vice president, client service, San Francisco; **Afton Bolz**, research director, San Francisco; **David Guell**, senior vice president, software engineering, Minneapolis.


Madden Feit


Haberkern-Mogal Bolz

Guell

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product and service update

Interpret launches syndicated research service

Interpret LLC, a Los Angeles research company, has launched its syndicated research service (SRS), designed to provide monthly reports, advisory services and research and analysis to help reveal consumer attitudes and behavior around digital media and emerging technologies. The service provides research in three practice areas: mobile devices and platforms; PC, handheld and console games; and digital media (music and video).

Complete reports and proprietary research will be available to clients monthly. In addition to regularly scheduled reports, Interpret offers customized research covering individual or standalone sectors. For more information visit www.interpretllc.com.

The Roper Global Diabetes Program enhances diabetes patient market study

The Roper Global Diabetes Program, a tracking study from GfK Healthcare, a Blue Bell, Pa., division of Nuremberg, Germany, research company The GfK Group, has updated its U.S. Diabetes Patient Market Study, which offers health care and related companies in the diabetes category access to patient data and market trends. The study aims to offer insights from diagnosed patients into patient attitudes and behaviors; influencers for lifestyle changes and treatment options; product usage and compliance; sources of care and insurance/reimbursement; diabetes control and demographics; and patients' therapy progression.

The 2009 report offers both standard and tailored reporting deliverables. Standard deliverables include a market overview and standard issue-centric reports. Customized deliverables include customized reports and presentations and access to GfK Healthcare's Roper Diabetes practice leader for consulting engagements.

The Roper Global Diabetes Program has also been updated to let clients conduct customized research at syndicated prices by incorporating two additional waves of data collection to the traditional study. For more information visit www.gfkhc.com.

TiVo and Quantcast partner to measure TV-Internet correlation

TiVo Inc., Alviso, Calif., and Quantcast, a San Francisco research company, have partnered to provide a cross-platform audience analysis solution designed to evaluate the correlation between television viewership and online activity. The TiVo/Quantcast sample includes 35,000 households and combines data from TiVo's Power||Watch ratings panel and Quantcast's direct measurement offering to evaluate advertising effectiveness, cross-platform media consumption and programming affinity by producing TV and online media usage and activity reports.

Power||Watch focuses on delivering program and commercial ratings data with demographic segmentations for households who have volunteered to take part in a passive consumer panel, and Quantcast solutions aim to interpret audiences and measure activity across brand Web sites and online advertising campaigns.

The collaboration examines questions such as: how does television and Web ad exposure influence downstream Internet behavior (i.e. "Were people who viewed my TV ad more likely to visit my Web site?"); and how does television viewing influence/predict Internet video viewing behavior, and vice-versa. For more information visit www.quantcast.com.

Askia users asked to help shape site update

Paris research company Askia has built a new version of its Web site on an open platform called Redmine, which includes an area where users and developers are allowed to discuss site creation together. The site also includes: documentation available online so the site can be improved collaboratively; Flash know-how and widgets; a feature where reported issues are allocated a number so users can follow its progression from solving to testing until final release; forums to post questions and receive responses from support, developers, sales or other users; and some interactive shared documents. For more information visit www.askia.com/redmine.

EASI updates software for easier use

EASI, a Madison Heights, Mich., research company, has enhanced its Web-based software to include demographic charts, in addition to demographic reports and maps, to provide a visual representation of demographic patterns and the ability to combine a ring study and profile analysis for targeted demographics. Advanced users may benefit from the bundling of two features at no additional cost: unlimited access to the EASI life-stage analysis and consumer expenditure market research features; and the Find the ZIP Plus 4s feature to assist in analyzing direct marketing target geographies. For more information visit www.easidemographics.com.

Gongos revamps iCommunities platform

Gongos Research, Auburn Hills, Mich., has debuted iCommunities 2009, a Web 2.0 platform designed to support a range of research community offerings and offer enhancements to its existing iCommunities and metaCommunity research environments, as well as a new iCommunity Lite offering.

The iCommunities 2009 platform aims to create an interactive environment for consumers, while offering clients greater versatility to conduct and analyze research. Flash poll capabilities have been enhanced to give companies added flexibility to field questions and concepts that require a quick turnaround. New features include a qualitative reader and data plan to let clients filter qualitative and quantitative data within the platform, enabling users to synthesize large amounts of raw data prior to the delivery of reports.

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News notes

Research companies **Roger Green and Associates**, New Hope, Pa.; **Seek Research**, Covington, Ky.; and **Schlesinger Associates**, Edison, N.J., have collaborated to from a social activism consortium called **SEEDS - Cultivating Good**. The group has launched Marty Green's Lunch, a one-day volunteer program aimed at bringing the marketing research community together to feed the hungry. The program includes three elements: recruit individuals to serve lunch to the hungry, ask coworkers to donate food and hygiene products to the food bank/soup kitchen where volunteers are serving the hungry; and raise money for Feeding America, formerly Second Harvest. The group's goal is to reach all 206 food banks supported by Feeding America.

Lookman Temidayo Adegbola has been found guilty in Canadian courts of operating an employment opportunity scam involving counterfeit checks. In the mystery shopping version of the scam, U.S. consumers received an unsolicited cashier's check and were asked to cash the check and wire a portion of the money back to a specified address, while conducting a brief evaluation of the wiring service. In some cases, they were also asked to conduct evaluations of other retailers. The letter promised payment by keeping a portion of the check. In reality, the check was bogus and bounced several days later, leaving the consumer liable for the entire amount of the check.

Following a trial by judge and jury in the Ontario Superior Court of Justice, Adegbola was found guilty of fraud over $5,000, forgery, possession of instruments of forgery and uttering forged documents. Sentencing for Adegbola will take place on September 15, 2009.

London's *The Daily Mail* reported in June that the U.K.'s postal service, **Royal Mail**, could be liable for a fine of up to £40 million if convicted of interfering with an independent mystery shopping-style study regarding mail delivery promptness and accuracy and skewing study results in its favor. The manipulation involved some Royal Mail managers learning the names and addresses of the mystery shoppers and then providing deliberately exceptional service to those particular customers. Senior staff members at Royal Mail were able to claim large bonuses for positive marks on the study.

Bartels Research, Clovis, Calif., has closed its doors after 45 years in industry. The company cites the economy as its reason for shutting down operations. Some staff members will continue conducting research in the Fresno-Clovis, Calif., area.

Calendar of Events September-October

GKA Research will hold a conference, themed "Innovative Approaches in Behavioral Marketing for the Green Economy," on September 9-11 at the Wisconsin School of Business in Madison, Wis.

ESOMAR will hold its annual congress on September 15-18 in Montreux, Switzerland. For more information visit www.esomar.org.

The Australian Market and Social Research Society will hold its annual national conference, themed "100 Stories," on September 30-October 1 at the Hilton Hotel in Sydney, Australia. Workshops will be held on October 2. For more information visit www.mrsa.com.au.

TRC Market Research and the Philadelphia Chapter of the American Marketing Association will hold a market research conference, themed "Understanding Customers to Drive Business: Financial Linkage, Social Networks and Preference Measurement," on October 2 at the Union League in Philadelphia. For more information visit www.trchome.com.

The AMA will hold its annual marketing research conference on October 4-7 at Desert Springs JW Marriott Resort and Spa in Palm Desert, Calif. For more information visit www.marketingpower.com.

The QRCA will hold its annual conference, themed "Communicate, Rejuvenate, Celebrate," on October 7-9 at Desert Resorts in Palm Springs, Calif. For more information visit www.qrca.org.

CASRO will hold its annual conference on October 14-16 at The Broadmoor in Colorado Springs, Colo. For more information visit www.casro.org.

IIR will hold The Market Research Event 2009 on October 18-21 at the Red Rock Casino Resort and Spa in Las Vegas. Register with code TMRE09QUIRK to save 15 percent off standard rates. For more information visit www.iirusa.com.

PMRG will hold its annual meeting of The PMRG Institute, themed "Tools for Maximizing Brand Potential," on October 25-27 at the Sheraton Philadelphia City Center Hotel in Philadelphia. For more information visit www.pmrg.org.

ESOMAR will hold its annual online research conference, themed "Online Panels and Beyond," on October 26-28 in Chicago. For more information visit www.esomar.org.

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

Acquisitions/transactions

New York research company **Guidepoint Global** has acquired **Vista Research Inc.**, New York, from **Standard & Poor's**, a division of The McGraw-Hill Companies. With the acquisition, Guidepoint Global will expand its team of client service professionals and recruiters to support a larger client base. Terms of the transaction were not disclosed.

Dallas research company **Toluna** has acquired the Internet Survey Solutions division of **Greenfield Online**, a Wilton, Conn., research

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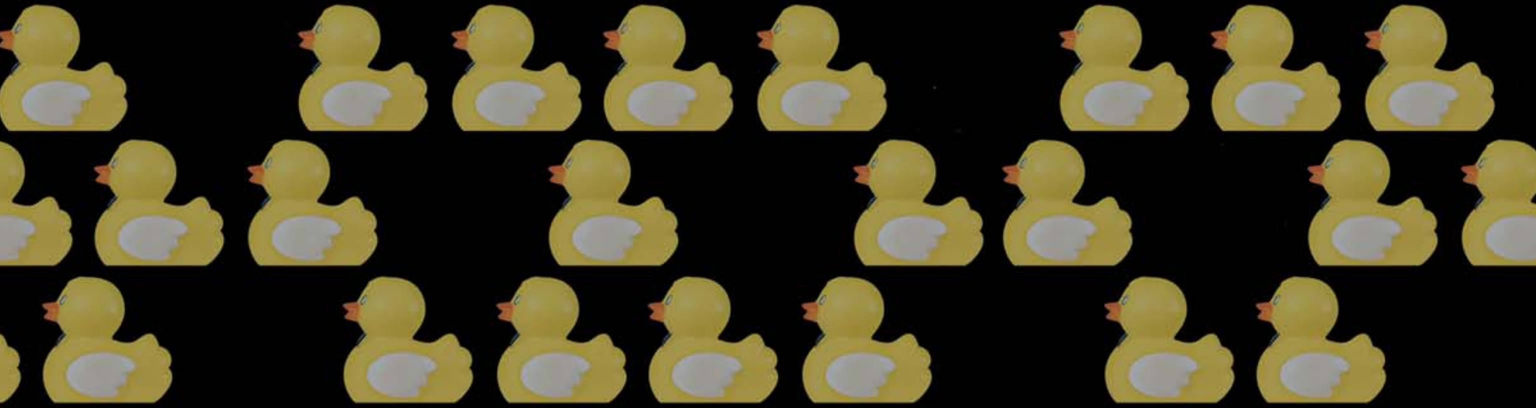


By Tim Macer

Ruby tabulation software

We always try to present something new in these software reviews, but this time, we think we are onto something that could break the mold: Ruby, a new tabulation software package from an Australian producer, Red Centre Software, that leaves most of the existing choices looking decidedly dated. It's refreshing, because for a while, most efforts in market research software seem to have gone into improving data collection and making it work across an ever-broadening spectrum of research channels. Innovation at the back end seems to have focused on presentation, and has often left research companies and data processing operations with a mishmash of technology and a few lash-ups along the way to transform survey data into the range of deliverables that research clients expect today.

Ruby could easily be mistaken for yet another end-user tabulation tool like Confirmit's Pulsar Web or SPSS's Desktop Reporter, with its graphical user interface and drag-and-drop menus. The reality is that it is a full-fledged tabulation and reporting system aimed squarely at the data processing professional. If you are looking for a Quantum replacement, this program deserves a test-drive.

Ruby by Red Centre Software (redcentresoftware.com)

Pros
- Crosstabs and charts of every kind from large or complex datasets, and so much more
- Quick and efficient for a DP specialist to use, with a choice of GUI access and scripting
- Push-pull integration with Excel and Power Point for report preparation and automation
- Superb proprietary charting to visualize MR data more effectively than in Excel or PowerPoint
- Excellent support for managing trackers

Cons
- Interface is bewildering to beginners; a steep learning curve
- No simple Web browser interface for end users or to provide clients with portal access to studies

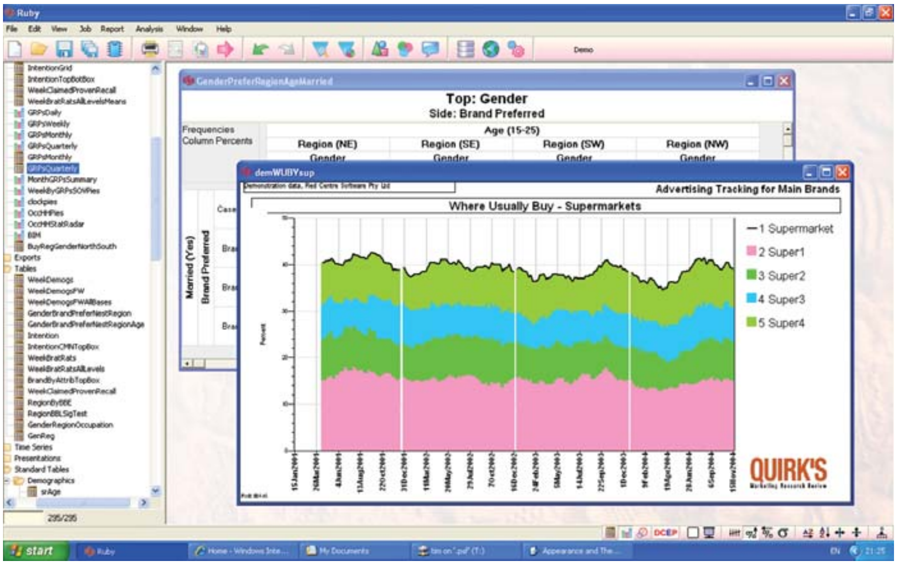
Cost
- Full version is $4,800 (USD) for a single-user annual license (allows setup); additional analyst versions are $2,400 (USD). Volume discounts available.

Editor's note: Tim Macer, managing director of U.K. consulting firm meaning ltd., writes as an independent software analyst and advisor. He can be reached at tim.macer@meaning.uk.com. To view this article online, enter article ID 20090801 at quirks.com/articles.

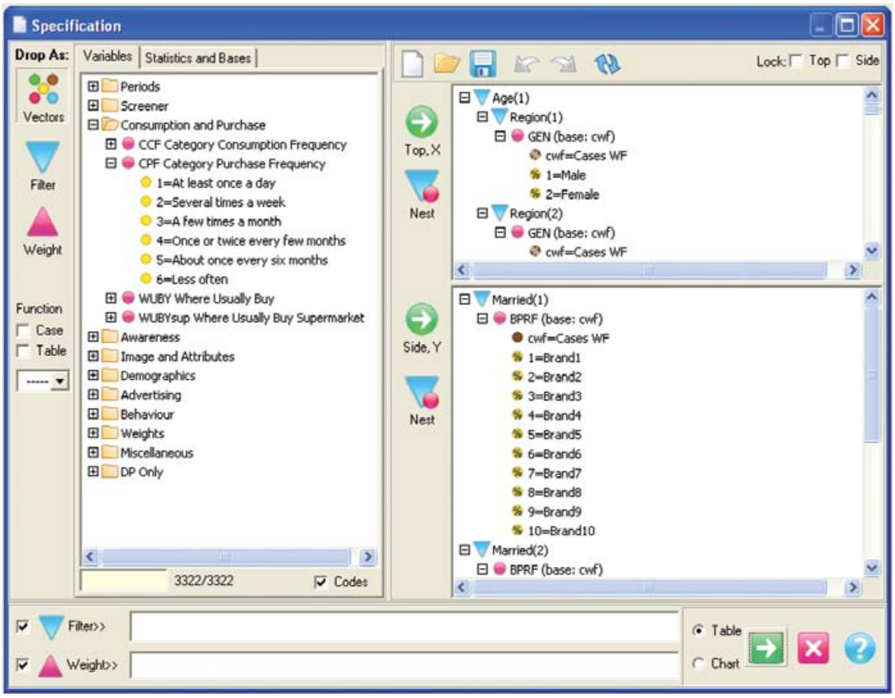
No limits

There appear to be no limits on the data you could use. It will import data from most MR data formats, including Quantum, Triple S and SPSS. Internally, it works with flat ASCII files, but it is blisteringly fast, even when handling massive files. It will handle hierarchical data of any complexity and offers the tools to analyze multi-level data throughout, which is something modern analysis tools often ignore.

It is equally at home dealing with textual data. The producers provided me with a series of charts and tables they had produced from analyzing Emily Brontë's *Wuthering Heights* by treating the text as a data file. The same could be done for blogs, RSS feeds and the mass of other Web 2.0 content



Charting is a particular strength of Ruby, which handles very large amounts of data swiftly and intelligently. This chart, for example, contains 200 weeks of smoothed data.



This is what Ruby describes as the specification. There is no syntax in sight, but hidden around this window are hundreds of options that can be applied to transform the variables that make up the current table or chart.

that many researchers feel is still beyond their grasp.

More conventionally, Ruby contains a broad range of tools specifically for handing trackers, so that you are not left having to automate the reconciliation of differences between waves due to variations in the question set and answer lists.

Ruby is very intelligent when it comes to processing the data. The data in the tables reported or charted in MR has often gone through a long chain of transformations, and in the old tools, there could be yards of "spaghetti code" supporting these transformations. Trying to work out why a particular row on a table is showing zeroes when it shouldn't can take forever in the old tools, as you trace back through this tangle of code, but Ruby will help you track back through the chain of definitions in seconds, and even let you see the values as you go. It is the kind of diagnostic tool that DP professionals deserve but rarely get.

In Ruby, you will probably make most of these data combinations and transformations visually, though it does also allow you to write your own syntax, or export the syntax, fiddle with it and import it again (the combination that DP experts often find gives them the best of both worlds). However, Ruby keeps track of the provenance of every variable, and at any point you can click on a variable and see exactly where the data came from and even see the values at each stage.

Broad range of expressions

The array of options for tabulation and data processing is immense, with a broad range of expressions that can be used to manipulate your data or columns and rows in tables. There is complete flexibility over percentaging and indexing values off other values, or basing one table on another, so it is great for producing all of those really difficult tables where every line seems to have a different definition.

With charting, Ruby gives you the choice of using its own proprietary charting engine or pushing the data out to PowerPoint or Excel charts. The native Ruby charts are a treat to work with, as the developers seem to have gone out of their way to redress the inadequacies of Excel and PowerPoint charts. For time-series charts, concepts such as smoothing and rolling periods are built-in. You can add trend lines and arbitrary annotations very easily. Charts can be astonishingly complex and can contain thousands of data points or periods, if you have the data. Yet it will always present the data clearly and without labels or points clashing, as so often happens in Excel.

Excel and PowerPoint charts are also dynamic, and the Ruby data source will be embedded in the chart so that the charts can be refreshed and updated if the underlying data changes.

Completely flexible

Amy Lee is data processing manager at Inside Story, a market research and business insights consultancy based in Sydney, Australia. She has been using Ruby for two years, alongside five other researchers and analysts, to analyze custom quantitative projects and a number of large-scale trackers.

"We were able to move to Ruby a couple of years ago, and it is now the main program we use, because it can do everything we need to do. I find it is an extremely powerful and flexible tool. Other tools can be quite restrictive, but Ruby is very powerful and completely flexible," Lee says.

The program goes beyond what more traditional DP crosstab tools enable her to do, she says. "Compared with other programs I have used, Ruby allows me to filter and drill down into the data much more than I could with them. It's especially good at exporting live charts and tables into documents.

"Once they are in PowerPoint or Word, trend charts can be opened up and adjusted as necessary. When it is a live chart, it means you can update the data. Instead of having to go back to Ruby, open it up and try to find the chart and then read the data, you can just double-click it inside PowerPoint and you see all the figures change. And there is even an undo feature, which is good for any unintentional errors."

Lee freely admits that this is not a program you can feel your way into using without having some training and time to understand it. "It is really designed for a technical DP person. If you have someone with several years' experience with another program they will have no problem picking this up, as everything will be very familiar to them. But we also had a client who wanted to use it, someone with a research rather than a DP background, and they found it a bit overwhelming, because it can do so much. It looks complex, but once you get the hang of it, you can do what you need very quickly."

Among the other distinguishing features Lee points to are the speed of the software, which is very fast to process large amounts of data and produce numerous of tables and charts; its built-in handling of time-series, allowing you to combine or suppress periods very easily; and the range of charts offered, in particular the perceptual maps.

So far behind

Some of the research companies I speak with are becoming uneasy that the legacy data processing tools they depend on have fallen so far behind and are, in some cases, in danger of becoming dead products. They have endured because the GUI-based "replacements" bundled in with the more modern data collection tools just don't cover the breadth of functionality that is needed. Even though the sheer range of functionality it offers is bewildering to the newcomer, you can't criticize Ruby for lacking breadth or depth in what it lets you do. | Q

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green research

By Amy J. Hebard

Making it easier to think green

How Web 2.0 made a long survey more palatable

What if? What if we changed the look and feel of marketing research questionnaire design, away from sterile radio buttons in grids, and thought of surveys (when online) as video games, or even as dialogues between trusted friends?

Would candor collapse? Would our sampling frames be skewed? Would our data be destroyed? Of course not. Not when done with care, as our firm found out.

Now in its third wave, Eco-Insights is an online survey conducted by my company, Syracuse, N.Y.-based Earthsense. Our aim is to give clients insight into consumers' green attitudes and behaviors. To do this we survey 30,000 U.S. adults online each time, with a nationally representative sample.

The survey is long (35 minutes on average), but to get a true picture of how people are thinking and acting, we need to cover a lot of territory – values, attitudes, motivations, purchasing and other behavior, demographics, etc.

The green market, after all, is exploding, with increasing numbers of new green products released at a dizzying pace. Total organic sales in the U.S. – both food and non-food products – jumped from $17.7 billion in 2006 to an estimated $25 billion last year. Mass-market grocery stores represent the largest single distribution channel: the most recent Organic Trade Association survey of manufacturers estimates that 38 percent of organic food sales were made in these stores.

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snapshot

Green-industry researcher Earthsense worked with its partners to improve the survey-taking experience for respondents of its online Eco-Insights study, adding a female avatar and other elements to enhance interactivity and create a sense of fun.

Our clients need more product category coverage, not less. Thus we needed to make sure our design was as efficient as we could make it, and the experience as engaging as possible for our participants.

Against this backdrop, we decided in 2009, beginning with the third wave, to conduct the survey more frequently and now do so twice-yearly. The result? Fresh content, timely outputs and (in theory) a shorter instrument.

While we recognized the challenges of trying to capture a broad range of information in a way that would keep survey participants from becoming frustrated, we knew that Web 2.0+ capabilities increasingly provide tantalizing opportunities to engage respondents and reduce fatigue while allowing us to respect their time and ensure the quality of their input.

Set objectives

With these challenges and opportunities front-and-center, we set some ambitious objectives for ourselves:

- tailor the survey to show respect for respondents (engage them and make the experience interactive - a dialogue; respect their time);
- solicit respondents' feedback about their experience;
- achieve lower survey dropout levels, compared to industry standards;
- show appreciation by sharing with them some of what we learn;
- and last, but not least: have a little fun in the process!

These objectives are not always standard in the industry. We needed "partners in crime" willing to work with us to make this happen, so we solicited competitive bids to select both our sample provider and programming support. We chose to partner with Shelton, Conn.-based Survey Sampling International (SSI) for use of its Survey Spot panel, seeing the firm's Respondent Preservation Initiative as right up our alley. For programming support we turned to Boston-based Bernett Research.

Lot of survey real estate

Eco-Insights covers a lot of survey real estate:

- 140 product categories (does the consumer buy green or conventional and why?);
- channels consumers shop in, including major mass-market grocery chains, mass merchandisers, and club, discount and drug stores;
- attitudes and behaviors toward health and the environment;
- changes in green-buying behavior;

- a range of demographic and other profiling questions;
- geo-coding to understand geographic drivers of behavior.

We close the survey with two questions, one a five-point rating scale where participants rated their survey experience ("To what extent did you enjoy taking this survey?"), followed by an open-ended question ("Please tell me why you gave this rating.") The results were very informative, enabling us to draw some conclusions about what we need to do more – and less – of this fall when we carry out our fourth wave.

The respondent experience

We measured the respondent experience in three ways: How did they describe it? How did they rate it? And (to examine engagement) was their dropout rate lower than average?

Descriptions: No surprise – "long" was the most popular adjective they used when they explained how they rated their experience. (Sigh.) But the other terms that rose to the top gave us hope, starting with "like" and "liked." Nearly every frequently-used descriptor was positive, words we were pleased to find used to describe Eco-Insights.

Experience ratings: Few found the experience of taking the survey negative: indeed, the vast majority – 90 percent – gave it a 3, 4 or 5 rating (where 1 = not at all enjoy, 5 = enjoyed it a great deal). With no norms yet to compare this result with, we are using the data in two ways. First, this rating is the benchmark we will use to measure improvement over time in subsequent waves. In addition, we are open to comparing results with fellow researchers with other large, complex studies. (Interested? Let us know!)

Respondent engagement: An important measure of engagement is completion. Our expectation was that respondents would be willing to hang with us when we show respect for their time and contributions. We were pleased to find that, compared to SSI's industry benchmark with studies of comparable length, our dropout rate was 14 percent lower.

A few key things

We credit innovations in the respondent experience with these results and want to share with others a few of the key things we did to achieve them:

Interactive: The principle of making the experience interactive guided our design in a number of ways, and many participants noticed.

"Love the interactive format! I wish more surveys were done this way. Thank you."

"I really liked the interactiveness . . . It was probably the most fun and interactive survey I have ever taken."

Personalization: From the opening screen to the farewell, respondents realized this was not their father's online survey. We introduced the Eco-Insights survey avatar Veronica,

Respondents said the use of survey avatar Veronica helped personalize the usually impersonal act of taking a survey.

our respondents' personal Sherpa, and her first question was about their name. As the plan was for her to interact with them throughout the instrument, "Hey you" just wouldn't do. Their interactions would be personalized but still anonymous, of course.

Veronica appeared 15 to 20 times, depending on skip patterns, to: provide information (e.g., how to use a response scale or to introduce a verbatim question); give encouragement and status ("Not much longer now!"); or ask questions directly. She was

Test the effects

A great deal of research has demonstrated that long questionnaires yield poor data quality. This occurs in at least two ways. First, longer questionnaires yield higher dropout rates than shorter ones, which causes non-response bias. Second, satisficing - a response behavior whereby people don't expend the effort required to give careful, thoughtful, truthful answers - causes a drop in data quality. Moreover, fatigue, induced by questionnaire length, causes an increase in satisficing.

One way for researchers to test whether their questionnaires are too long is to field a one-question survey using the last (substantive) question of a previous study. This mimics an experimental design whereby length is manipulated by flipping the order of questions. Any differences in responses can be attributed to either question order effects or length.

If a questionnaire is deemed to be too long, and shortening it or splitting and recontacting respondents is not a viable option, Earthsense's research suggests that creating an engaging experience can reduce signs of satisficing. However, some research shows that new methods can be engaging, interactive, and a "nice change of pace," but unfortunately these techniques can also be confusing, difficult and distracting. So again, researchers ought to test the effects of efforts to make questionnaires more engaging before fully implementing a new method.

– Philip Garland, senior methodologist, Survey Sampling International

frequently mentioned when we asked for feedback about the experience and reactions were overwhelmingly positive, including more than one request for her "phone number"!)

"I liked the approach of this survey, as if I was speaking with someone."

"I like it when people call me by my name. Not like others that just say 'you.' I liked taking this survey - it felt like someone was there talking to me because of the cartoon lady."

"I actually like the use of 'Veronica' and the use of her 'words of encouragement' and 'updates' on my survey progress."

"It didn't feel as long as it was due to the fun little lady calling out my name. :)"

Visualization: We tried to think more like designers of video games than surveys. Exploiting new capabilities enabled by the Web, we used Confirmit (version 14), challenging our programmers to high heights of creativity. In the green world you hear talk of being "off the (electrical) grid." That translated, in our survey, into becoming anti-grid (survey grid, that is) as much as possible. We used reveals, masking and picture drag-and-drops in place of text to represent products we were testing:

"I really like the graphics. If this had been a survey with only text I would not have even bothered finishing it, because of mental/visual fatigue."

"I felt that the dragging and interactive aspect of it was much more engaging and better managed than merely clicking dot after dot to answer the same information."

There are a few caveats. Using pictures added considerable development time and it's critical to program them for pre-loading, otherwise you'll try people's patience. And, word to the wise: use them sparingly. We covered 139 other products. Need we say that was too many?

Response format variations: People get bored quickly with repetition. For that reason, we incorporated several different response formats in addition to drag-and-drops. Sliders, in particular, were well received:

"All the dragging and dropping was cool, and the sliders make answering more fun and easy. Way less boring than most surveys!"

"The option to use a slider or enter a number helped speed up some questions for me."

"Although it was a long survey that I normally would have closed out of by now, you made it entertaining enough to keep me."

A handful of people mentioned difficulty dragging the sliders; one claimed her responses weren't accurate and we should consider eliminating them. (We did.) Having thoroughly tested the sliders and other response formats with a variety of download speeds and screen configurations, we knew this rarely occurred. The message to all, though, is this: test, test, test.

Survey length: This was our bugaboo. Despite a focused effort to eliminate anything unnecessary, the green space is so big that much needs to be covered to represent this market effectively. Of all the adjectives respondents used to describe the experience, "long" was the first mentioned by many.

"The survey was tooooooooooooo long."

"I didn't like the length - [it was] too long, [but I] did like the animation and encouragement to continue."

"It was more fun than most, but toooooo looooonnng."

Length considerations have been important to date, and will be again with our next wave this fall.

Foundation for refinements

Ratings, survey feedback and "other/specify" verbatims are providing the foundation for refinements to the survey. In addition, sharing what we learn is an important contribution we have made to the partnerships with both SSI and Bernett, as this can only help all of us in our common goal of improving the respondent experience. We also shared some of our learnings with Survey Spot panelists. With the economy pressing on everyone's minds we thought the accompanying chart, for example, would be of interest. We found that, contrary to popular belief, many people claim to be consistent with their green buying - at whatever level it had been before. The challenge, of course, is to understand those whose behaviors are changing and how - but that's another article for another day!

Ultimate survey sin

Of the more than 30,000 respondents who took our spring 2009 survey, one took us to task for, as she put it, "commit[ing] the ultimate survey sin of anthropomorphizing. You are NOT a person, g-dd-mn it." She is entitled to her opinion, but we respectfully disagree that this is

Green Buyers are Pretty Consistent, and in Some Categories are Even Growing				
Product Category Bought (in last six mo.)	Bought SAME # of Green Products	Bought MORE/ FEWER Green Products	Spent MORE/ LESS $ on Green Purchases	Change: Growth (G), Stable (S), Loss (L)
Baby Foods	77%	13% / 10%	14% / 15%	G
Beverages	80%	10% / 10%	12% / 13%	S
Cleaning Supplies	65%	23% / 12%	18% / 15%	G
Fresh Foods	70%	23% / 7%	23% / 10%	G
Frozen Foods	78%	11% / 11%	12% / 13%	S
Household Supplies	69%	21% / 10%	17% / 14%	G
Packaged Foods	75%	12% / 13%	13% / 15%	S or L
Personal Products	80%	12% / 9%	14% / 12%	G
Source: Eco-Insights, spring 2009				

the ultimate (or even necessarily an important) "survey sin." The survey sin that is egregious is the tedium and boredom caused by (and disrespect for respondents' time illustrated by) the many poorly-conceived surveys, online or otherwise, that our profession has fielded in the past.

Rather than anthropomorphizing Veronica, our intent was to show a human face to our survey respondents, and interact with them - to the extent we can virtually - as fellow specimens of the same human species. Panelists (or respondents, or survey takers, call them what you will) are not ciphers. They are people. Veronica is part and parcel of our goal of treating them as such.

So, we close with some of the guidelines we use, and will continue to use, in coming waves of the survey, in hopes others pursuing a similar path will find them valuable:

Aim for engaging. Take the time you need to do the survey right. Program it with respondent preservation in mind, acknowledging that, yes, a more engaging process does require crafting (no cookie cutters) and may take extra time.

Personalize. Keep the consumer engaged through personalized touches, while maintaining appropriate distance and objectivity.

Respect their time. Encourage respondents as they make progress; be honest at the outset about the survey length, especially if it's long. Break the instrument into separate studies if possible.

Be interactive. Create an interactive environment that feels like a dialogue by using an avatar to interact with the respondent.

Get feedback. Strive to decrease dropout levels by asking for candid feedback about the survey experience at the end, and use it when designing your next study.

Reciprocate. Share some key learnings with respondents, so they feel appreciated and realize that you value their time.

Even refreshing

In closing, for the Eco-Insights team, the feedback we received was often insightful, specific and even refreshing: 365 people actually used the closing verbatim to say thanks for the experience!

Veronica thanked them, too, as she bid them farewell: "Thank you so much!!! Your opinions will help shape the way companies think about doing business in the future."

She'd like that to be true for the market research industry, too! | Q

Mobile research - the fifth methodology?

Like the early days of online research, opportunities exist as questions persist

By Tim Snaith

The speed of development of communications technologies is such that while online is still growing, the mobile phone has rapidly emerged as the preferred tool of communication for many consumers. Capabilities previously only available over the Internet are now available on mobile phones, a fact that is not lost on researchers. Where once the mobile phone was thought to offer a minor supporting role in research, it has evolved, as have the research solutions that leverage its capabilities, making it a richer environment than the simple two-way text message.

Mobile phones share the same characteristics as the four main traditional quantitative methodologies (face-to-face, postal, telephone and online), but add location and immediacy of results to the mix. Further, if the success of online was due to global penetration of Web connections, it is key to note that there are already three times as many mobile phone subscriptions as Internet connections, with 3.5 billion handsets, representing a 40 percent global penetration rate (90 percent in the developed world) (Netsize Guide, 2008, Informa Telecoms and Media, 2008).

As the modern communication method of choice, the mobile phone is well-supported, with a global network infrastructure that can deliver massive volumes of traffic seamlessly - for example, 6.3 billion SMS messages and 17.3 million WAP users per month in the U.K. alone (Text.it, 2008).

The conditions are clearly in place to support mobile phone-based interviewing as the fifth research methodology.

Pervasive impact

Given that mobile research is just out of the starting blocks, is there any evidence in other markets of the pervasive impact of the mobile handset revolution? Well, mobile marketing is forecast to mirror and then surpass online marketing growth due to that same immediacy of contact with consumers in a buying environment where the shopping mall, Internet and mobile telecommunications converge.

A look at online advertising and marketing's growth and the increasing momentum of the mobile channel in this area gives a good indication of the emerging scenario for mobile research. In 2005, global advertising revenues reached £188.7 billion (MediaGuardian), with Internet spending seeing a 20.4

snapshot

This article explores the emergence of mobile phone research as a fifth type of quantitative research methodology (along with face-to-face, postal, telephone and online) and looks at the opportunities it presents.

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percent growth to $17.2 billion. The U.K. online advertising spend in 2006 was £2.02 billion (IAB in partnership with PwC and WARC), showing 41 percent growth. So what are the forecasts for mobile advertising and marketing? According to Analysys (2007) mobile advertising will represent 3 percent of the global advertising market by 2012 and ABI Research (2007) forecasts that the world market for mobile marketing and advertising will reach $19 billion by 2011.

According to Airwide Solutions (2006), by 2010, 52 percent of the brands surveyed expect to be spending between 5 percent and 25 percent of their total marketing budget on mobile marketing.

All of this evidence demonstrates that the global market for delivering mobile marketing campaigns is rapidly expanding. As it does, commentary indicates that probably the biggest challenge for the industry lies in the ability to provide effective campaign metrics that include consumer evaluation and behavioral insight. It is here where the fifth methodology will grow to be an equal contributor to global market research, advertising and marketing revenues.

Willingness to engage

When it first became obvious that global populations were choosing to communicate via the mobile phone, some visionary research was conducted by Joel Down (Mori, 2000) to trial respondents' willingness to engage over the mobile channel. This research, while at first positive, appears to have had the effect of classifying mobile research as merely "a viable research method for short, simple surveys that are popular among users of mobile Internet technology."

This assumption, along with the following ones, has made it necessary to reintroduce marketers to the concept of mobile phone-based research and reeducate them on its potential:

- Only young people use their mobile phones for other than voice calls.
- People are so concerned about the cost of messaging, because of the proliferation of premium reverse-billed services, spam and high-profile TV and radio shows that have been found to be misrepresenting services, that they won't engage.
- The mobile phone is too personal and therefore people are protective of giving permission to contact them.
- Data security in a hosted service is an issue.

All of these beliefs have a sense of déjà vu and remind us of some of the caveats that were raised in the early days of online research - most of which, as evidenced by its widespread global revenues, have largely been overcome.

What can the fifth methodology deliver? Well, we know that it can deliver an SMS message and most marketers also know that it can deliver a WAP survey providing an online-like experience on the mobile phone's Internet browser. But did you know that the questions you can ask and the answers you receive can include the following?

- the sending and receiving of pic-

tures and videos as questions and answers;

- open text, rating and multiple-choice questions;
- time and date stamps to identify when each question is answered;
- GPS, so that the location of the respondent who has given their permission can be engaged;
- routing and personalization, so that each person's survey experience demonstrates an understanding of them and their preferences;
- anonymity options, so that people can choose to hide their personal data in the results database;
- choice, so that the survey respondent can choose WAP or SMS according to their preference and technological capability rather than the assumed capability of their phone;
- quotas that don't just switch the survey off when you hit your desired number of respondents but that send a thank-you message to notify the survey recipient about what is happening;
- reminders that can be set on each question to politely prompt the recipient that they have not yet completed their short survey;
- communication with the survey administrator of start, end and response rates in live surveys so they know what's happening even when not logged into the solution.

Increases the options

All of this means that the applications of mobile phone research are limited only by the imagination of the researcher. When combined in multimode approach with the other four methodologies, mobile increases the options for all five approaches.

Some applications include:

- point-of-sale/service customer satisfaction and loyalty surveys;
- event feedback – before, during and after;
- brand and advertising trackers – where did they experience the brand and what did they think?
- diary trackers – when did they experience the brand, event, usage instance?
- employee motivation – pulse-check the key drivers rather than wait for the annual results in order to identify issues and maintain motivation;
- live product concept testing – present the survey trigger in the form of a keyword and number in the shopping environment (plasma screen, on the packaging, poster, cash register receipt).

Principles of good research apply

Because this is a rapidly emerging methodology, there is not a consolidated body of evidence to guarantee effectiveness. Our firm has seen that the principles of good research apply here as elsewhere. Indeed where the recipients are engaged correctly around giving their permission and receiving appropriate reward for their time and effort, the results are compelling:

- a 35 percent response rate in a school's parental consultation, where before it was less than 1 percent using paper-based surveys;
- a 71 percent response rate with 58 percent completion rate in two hours for a 1,000-person panel study;
- in the U.K., an 85 percent response rate in 10 minutes for pub-based brand feedback during halftime of sporting events;
- a youth diary tracker garnered 2,000 pieces of feedback over one week from 200 participants;
- a product field test netted 1,600 pieces of feedback over a three-week period from 150 participants.

Time is right

The time is right to be involved in the mobile research revolution. Indeed it has the feeling of a welcome opportunity for individuals to champion and own a piece of the method as it emerges, and for businesses to demonstrate that they are on the cutting edge of innovation – delivering new insights for clients and documenting findings to consolidate the knowledge base of what the fifth methodology adds to the research world. | Q

brain wave research

This is your brain on advertising

What can measuring brain waves tell us about an ad's effectiveness?

By Charles Young
and Stephen Sands

Currently there is a great deal of interest among advertisers in new biometric research techniques that have been developed to deepen our understanding of how TV commercials really work. Physiological measures of various kinds – including electroencephalography (EEG) measures of brain waves, galvanic skin response, heart rates, facial response, pupil dilation and new brain imaging techniques such as functional magnetic resonance imaging or fMRI – are being used in an attempt to explore the underlying neurological basis of advertising effectiveness. These approaches are appealing because of their promise of providing grounding for the "soft" social science of advertising research in the "hard" neuroscience now being done on the brain.

But the reaction of many brand managers and creative directors is like that of family visitors to a hospital room nervously watching the readouts on the monitors hooked up to their television commercial. "What does it all mean?" they ask.

Driving ad researchers' interest in these new diagnostic methods is the sense that traditional interview-based methods of studying commercials fall short. One reason for this is the feeling that "self-report" data about how ads work is inherently suspect because the consumer may not know his or her real mind. Brain processes that are operating below the level of the conscious mind – the subconscious – cannot be self-reported.

Another reason for interest in biometrics is that traditional methods using rating statements and open-ended questions are verbally-biased and do not give proper credit to the non-verbal component of commercials, such as music or the visuals. Creative people have long suspected that traditional research approaches, such as day-after-recall testing, unfairly reward overly rational advertising and penalize emotional executions.

In fact, traditional research constructs such as attention-getting power, recall, brand linkage, communication and motivation measures (e.g., purchase intent) have been the subject of a great deal of validation research over many years and most of them work pretty well in predicting in-market ad performance. Report-card measures like these will always be relevant to practical advertising professionals who have to make go/no-go decisions about their advertising investment. The real contribution of biometrics and non-verbal measurement is more likely to come in the form of improved diagnostics, providing new insights into why,

snapshot

Two research firms, one specializing in copy testing, the other in brain wave measurement, teamed up to examine a series of fast-food TV ads to compare and contrast findings from their respective diagnostic approaches.

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for example, some ads get our attention while others do not.

Building bridges

Our own view is that useful knowledge in advertising science will come about as a result of building bridges between established ad research methods and the new findings of neuroscience. Indeed, neuroscientists have a unique opportunity that other medical researchers do not. This is because the human brain is the only organ in the body that can accurately self-report anything at all about what is happening to itself. What secrets would cardiologists learn about heart attacks if hearts could talk?

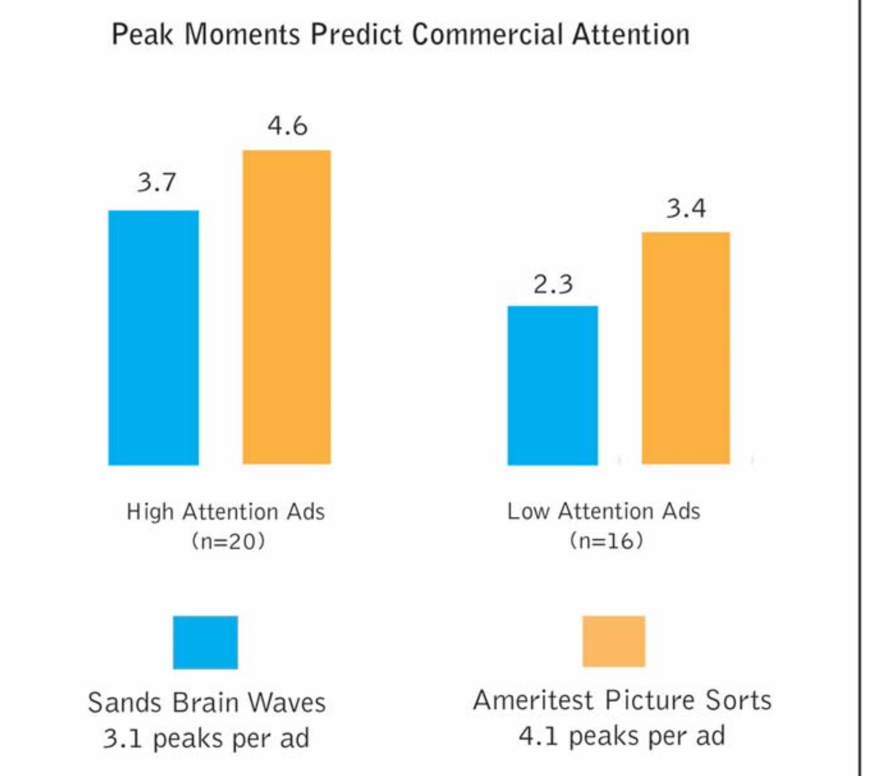
In the spirit of cooperating to gain new knowledge, Ameritest, an Albuquerque, N.M., ad research company, teamed up to do an R&D experiment with Sands Research, a brain-scan company based in El Paso, Texas. Our goal was to learn from each other by comparing research results on some ads from our two points of view: one, a measurement system based on Internet self-report, picture-sorting data and the other based on EEG brain wave measurement of ad effectiveness.

For our experiment we looked at 36 television commercials which Ameritest researched in the past year for fast-food advertisers, representing a range of well-known brands, from McDonald's to Pizza Hut to Subway. These ads were tested online, as part of Ameritest's syndicated creative tracking service, with a national sample of nearly 3,000 respondents. Sands retested these same ads among 60 respondents at a fixed location with its EEG equipment.

In our experimental design we wanted to understand the differences in performance between two groups of commercials in our sample. In the Ameritest system, 20 of the ads had performed well, scoring statistically above-norm in attention-getting power, but 16 ads had performed poorly, scoring below-norm. Attention is an important primary measure of ad performance because the first job an ad has to do in our cluttered world of advertising is to get noticed.

The Ameritest measure of attention is a verbal response to a simple question that we ask after a respondent is shown a clutter reel of competing ads: "Which of these ads did you find interesting?" This overall measure of advertising interest has been validated for predicting in-market ad performance, not only for awareness levels but also, in the case of fast-food advertising, for predicting sales results.

Figure 1



Contradict each other?

Using attention as a starting point we wanted to find out what each of the moment-by-moment diagnostics of our respective research systems would tell us about the breakthrough power of these ads. Will they tell us the same thing? Will they contradict each other? Or will they complement each other? While both are non-verbal techniques, the two diagnostic approaches are decidedly different.

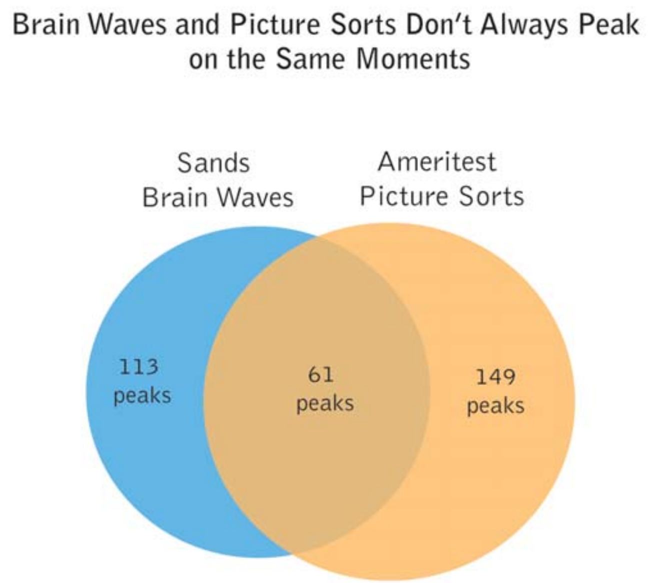
With an EEG the electrical activity of the brain is measured in real time, to the millisecond, to gauge how "aroused" the brain is by the inputs it's receiving from some stimulus. The EEG machine produces a very fine-grain curve showing viewer response; spikes show multiple peaks of arousal at different moments as a respondent watches a 30-second commercial.

Moreover, with Sands's measurement cap, containing 68 strategically-placed electrodes, feeding data through a proprietary, noise-reducing software, it's possible to measure how much electrical energy is being generated and determine where on the outer surfaces of the brain the activity is coming from. This shows the researcher which different parts of the brain are aroused at different moments in a commercial.

In contrast, Ameritest Picture Sorts use photographic stills taken from the ad to probe respondent reactions about 20 minutes after initial viewing. Multiple sorts are used to probe respondent reactions to commercials on multiple levels of self-reported response - the Flow of Attention produces different insights than the Flow of Emotion or the Flow of Meaning - and companion Copy Sorts are used to deconstruct the role of the copy from the role of the visuals in the overall performance of a commercial.

The sort we are looking at here is the first sort, the Flow of Attention, which asks respondents to sort images simply based on those they remember seeing in the ad versus those they don't. The resulting graph of selective attention is, like a brain wave curve, very fine-grained and bumpy - a typical commercial produces multiple peak moments of audience attention during a 30-second spot.

Figure 2



More peak moments

So, what did we learn from our experiment? When we counted the number of peaks produced by the brain wave machine and the number of peaks produced by the Flow of Attention and correlated them with the attention scores for the fast-food ads in our sample we found that both diagnostic techniques are predictive of commercial breakthrough performance. As you can see in Figure 1, high-attention ads generate significantly more peak moments of attention during the flow of the commercial than low-attention ads do - a statement which is true regardless of whether you are talking Flow of Attention peaks or brain wave peaks.

The second thing we learned is that the peak moments identified by the two diagnostics are not always the same moments. If you look at Figure 2 you can see the overlap between the two. For these 36 commercials, brain wave measurement identified 113 peaks of arousal and Picture Sorts identified 149, but only 61 of these moments, or roughly half, were the same moments. What this tells us is that each approach has something to teach the other about how the brain functions.

We get new insights into how advertising works by looking at the actual content of the ads at these different points in time. Let's start by looking at the moments where the two systems agree.

Double peaks - that is, moments that are peaks on both the brain wave and the Picture Sort graphs - are by far the most strongly predictive of the overall attention score for the ad. The convergence of the two systems, therefore, helps us identify the most hardworking parts of a television commercial. Analysis revealed that double peaks were most likely to contain the following content:

- important news, such as the announcement of a strong price promotion;
- inciting incidents, typically involving a moment strongly charged with negative emotion to set up a joke or storyline;
- surprising moments or turning points in stories;
- climactic moments or punch lines.

In other words, double peaks can be used to identify the dramatic highlights of the ad from the audience's point of view. If we were talking movies instead of television commercials, these would be the scenes that would make it into the movie trailer.

Now, what of the peak moments that one diagnostic technique identifies but the other does not? One part of the answer is quite simple. Remember that with brain waves we are measuring the audience response to the total multichannel experience of the commercial - the pictures plus the words plus the music - while the Picture Sorts focus on the vision part of the television commercial. In many instances, brain waves peak at a moment in the ad identified with a strong line of copy - an effect we can see in our Copy Sorts but not in our Picture Sorts.

Intriguing finding

But that's not the whole answer. A more intriguing finding is one that helps explain the rhythmic structure of visual communication that we've seen over the years in the wave-like patterns produced by the Flow of Attention graphs.

As we analyzed these commercials scene by scene, we observed the phenomenon that the brain wave pattern would sometimes peak at the beginning of a scene, usually where it was unclear what was going on, which would be a low spot in the Flow of Attention, and the brain wave arousal would fade at the end of the scene, just as the Flow of Attention was peaking. In short, the brain wave curve and Flow of Attention curve would be moving in opposite directions (see Figure 3).

This makes sense if we consider the differences between our two measurement techniques. Brain waves measure the amount of energy being produced by the brain moment-by-moment in real time, as a consumer watches an ad. The first Picture Sort is called the Flow of Attention because it is a measure of selective attention and is, in fact, most predictive of the attention score of an ad. But because visual recognition is collected after the fact, some minutes after images have been sorted out by the brain and encoded into long-term memory, the Flow of Attention graph can also be interpreted as a map of remembering and forgetting. The higher a picture is plotted on a Flow of Attention graph the more a consumer audience remembers that image.

Memory researchers have established that what the brain remembers is the meaning of what happens, not simple sensory inputs. With that in mind, the difference between what brain waves are peaking on and what the Picture Sorts are peaking on gives us a new insight into how long-term brand memories are created by advertising.

This is how the process works from a storytelling perspective: Scenes in stories open by arousing curiosity - engaging the audience with a change in the direction of the film. In response, the brain releases electrical charges to alert the mind to the new situation. "Pay attention, something new is about to happen here!" Brain waves peak as neurons fire away. As the scene unfolds and then resolves, the important information in the scene is sorted out. Finally the brain can return to a state of rest and neuronal activity settles down.

As a result, the mind may only store the end of the scene - when the meaning of the scene is resolved - as a memory. This is the part of the scene that would generate a peak in the Flow of Attention. In the context of advertising, it would be these meaningful memories that comprise the set of visuals encoded into long-term memory that we would expect to be most strongly associated with the brand image.

Of course, brain waves may also peak on a resolution scene. Because a commercial is a chain of meaningful moments, the resolution of one scene may be the beginning of another as involvement is ratcheted up with the increase in audience engagement in the flow of the film from the beginning to the end of a strong commercial.

Much we don't understand

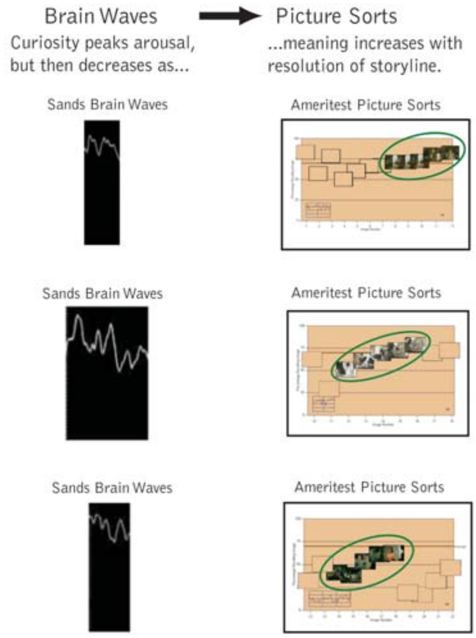
An interesting aspect of Sands's approach to measuring brain activity is to see how different parts of the brain light up as different meanings are created by parts of the ad. This reminds us all that there is much that we don't understand about the complex brain processes, many of them subconscious, which operate as a consumer watches a television commercial, a Web video or a movie.

With brain waves we can know precisely when the brain gets excited and approximately where in the gray matter the electrical activity is located - but we don't know what thoughts and what kinds of feelings the subject was having at any given moment. For that we need a mind-reading machine. Fortunately, the introspective mind can read itself - up to a point.

We could, of course, simply ask the consumer what he or she was feeling and thinking while watching the ad. By aiding the questioning with still photos from the ad associated with the precise moment when brain activity peaks, we aim to help the brain reconstruct the scene of the experience step-by-step.

With the second Picture Sort, the Flow of Emotion, we get at how much emotion, either positive or negative, the consumer was feeling at any given point in the film. And with the third Picture Sort, the Flow of Meaning, we get at which kinds of thoughts or emotions the consumer associated with that moment. In the context of these fast-food commercials we gave the consumer 10 brand values to choose from, to tag the meaning of each image.

Figure 3



Examples of brain arousal and picture recall moving in opposite directions.

Several images from a high-scoring Wendy's commercial, shown in Figure 4, illustrate this. In this commercial a man tells his girlfriend a story about why he was late coming home: shortly after stopping at Wendy's for a 99¢ Crispy Chicken Sandwich, he encountered a real unicorn in the street. As we see, in flashback, the remarkable sight of a white unicorn standing in the middle of the street the girl interrupts, unbelieving, "Wait a minute! There's a 99¢ Crispy Chicken Sandwich at Wendy's?!"

Three images, identified by peaks on both brain waves and Picture Sorts, convey the gist of the story. In the first, we see the man eating the chicken sandwich. Second, we see the unicorn. Finally, we see the unbelievable price offer.

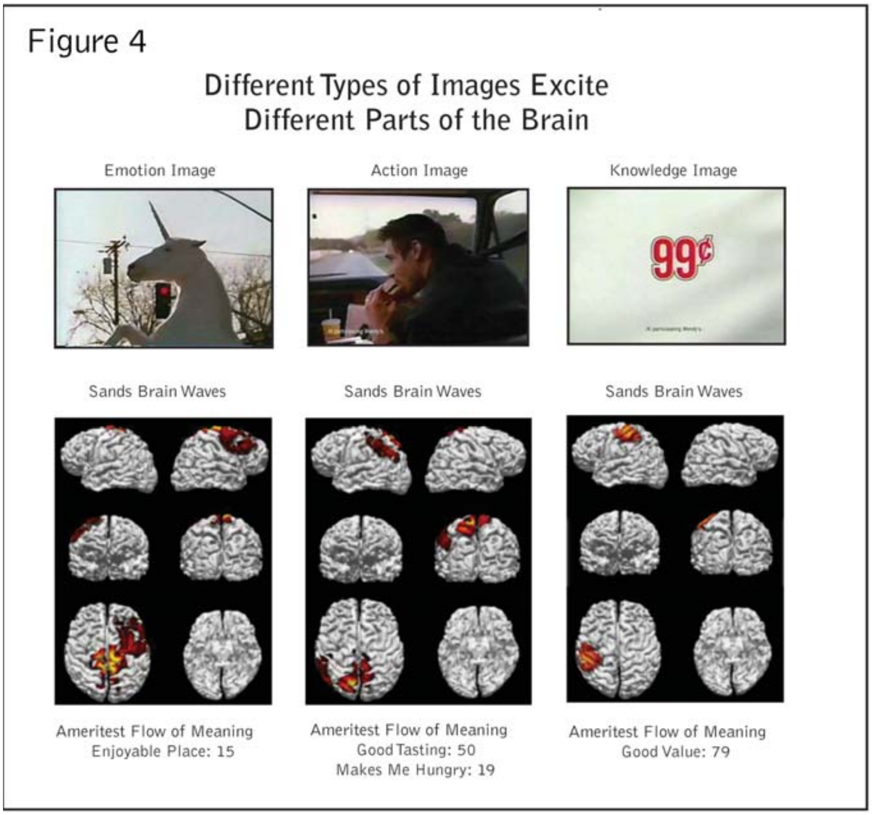
The Flow of Meaning allows us to reconstruct the sequence of brand-building ideas consumer took away from this commercial: 1) Good-tasting food, 2) at an enjoyable place to eat, 3) at a great price. (Admittedly, the rating of enjoyable place is low, but it makes an important point - advertising imagery can work on a metaphorical and not just a literal level. Associating the enchanting images of unicorns can subliminally imply that Wendy's is an enjoyable place and consumer self-report data can provide important insights to how such imagery can impact brand perceptions.)

Importantly, notice that for each of the three meaningful images different parts of the brain light up! This is strongly suggestive that different types of visual content in an ad are processed in different parts of the brain and, ultimately, may be stored in different memory systems of the mind.

Important for branding

Our hypothesis is that three different memory types are important for branding. First, there are knowledge memories, which consist of semantic ideas and rational concepts (e.g., the 99¢ price offer). Second, there are emotion, or episodic, memories, which are made up of the events, characters and relationships we describe in stories (e.g., the unicorn sighting). Third, there are action, or procedural, memories of bodily experiences and physical sensations (e.g., the sensory act of eating the chicken sandwich).

Images of action, such as product-



in-use or bite-and-smile shots, and images that evoke the senses of touch, taste and smell occur frequently in television advertising. But the role such images play in an ad is usually overlooked in the perennial debate of rational versus emotional advertising. The visual evidence provided by Sands's brain wave data strongly suggests that they provide a distinct class of brand imagery. Such imagery may be important for providing the consumer with the opportunity to rehearse consuming the product in the mind, as a form of virtual consumption before he or she consumes the actual product in the real world.

A final interesting observation is that we found more Picture Sorts peaks than brain wave peaks in these fast-food commercials. It turns out that there are nearly the same number of Flow of Attention and brain wave peaks in the story part of an ad – but the Flow of Attention produces more than twice as many peaks in the product part of the ad, particularly when images are on screen that activate our basic senses such as taste, touch or smell.

Our hypothesis for this is that these are images that tap into the oldest, deepest parts of the brain – the "reptilian" brain or amygdala, which sits in the anterior temporal lobe and which is where our primitive drives such as hunger or sex originate. Because these parts are deep in the center of our brains they're harder to read with an EEG that picks up more electrical activity closer to the surface. In fact, that's a major reason why some neuroscientists are using fMRI machines to pinpoint the deeper activity centers of the brain on advertising. In other words, there is still much to be learned about how advertising works in the brain.

Quite simple

Our overall conclusion from performing this experiment is quite simple. The best way to discover how your advertising is working with the consumer is a lot like the secret to a successful marriage: a man can learn something important by passively studying his wife's behavior and nonverbal responses, but for the best results we also recommend talking to her. | Q the business of research

10 considerations for starting your own research firm

Have an entrepreneurial itch? Take these tips to heart.

By Barb Gasper

The thought of moving from a corporate research department to head out on your own can be a daunting and off-putting notion. The key is to know what you are getting into by doing a little "research" before you decide to leave. Ponder these 10 considerations, which are based on advice gleaned from interviews with founders of start-up marketing and research companies.

1. What makes you unique? There are many research suppliers that offer a multitude of services. Like a brand, how do you plan to position yourself in a competitive marketplace? What is your point of difference? What knowledge or expertise can you offer that the next supplier cannot? You have, at most, a minute to set the hook and pique a client's interest during a new business call. This point of difference is your "headline" as you make the call. Do you bring a new perspective? Do you have expertise in working with teens? Are you a sports marketing research expert? Do you have experience in new product development? What background or unique talents make you better than others for the job? Put together a marketing plan and a mission statement. Target your clients carefully and play to your strengths. If you worked for a toy manufacturer, don't target medical or senior-citizen research.

2. Do you have a knack for selling? We marketers on the corporate side have marketing skills. We position brands, invent new ones, figure out marketing angles, analyze research data and do very little selling to outside clients. Suppliers pitch us - we are the ones being sold.

Job one as you start your own business is selling. You must be good at it. You must be able to take rejection. Even if the phone is ringing with interested clients, you will still need to sell yourself. Why are you the best choice for the project? What is your track record? What are your capabilities? Each conversation is like a job interview.

Ask yourself if you are a good listener. The best way to get the job is to address the client's concerns and needs. The only way to do this is to listen to what keeps them up at night. This not only helps you design the best research solution, it also gives you ammunition to pick out the key insights

snapshot

Leaving a client-side position to open your own research firm requires a leap of faith. To succeed, the author says, you need to determine what makes you unique, build your contact network, hone your sales skills and prepare for the highs and lows of life as a business owner.

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Data Quality is
Our Responsibility.

that address their concerns as you summarize the data.

Selling well involves persistence, putting yourself out there and risking rejection. If you don't like rejection and knocking on doors, think twice about going out on your own.

3. Do you have the contacts to sustain a business? If not, wait. Timing when to leave is integral to your success. Leave too early and you may be short on contacts or skills to sustain your business. Wait too long and you may miss a great opportunity. Do some research among your network of pals and colleagues. Tell them you are thinking of doing your own thing and ask for advice and their honest opinions.

Beware of bias as they are, after all, your friends and colleagues. Expect to hear encouragement and niceties since many of them are your current providers and don't want to lose business in case you stay.

Listen for real commitments. If you hear, "We could use you on this project next month," or, "Are you available to moderate our exploratory groups?" it's a good sign. These are time-bound and project-specific statements of interest. Others will say, "You are going to be so successful," or "Call me when you get out on your own" or, even better, "If I can help you in any way, let me know." These comments really mean, "Good luck - I see you as a competitor and if you need a supplier to partner with, call me. I need the business too."

Don't neglect to include your co-workers as future clients. Many suppliers leave a company and contract back with the company they left. This works well and offers an initial sustaining piece of business. Never burn bridges and, before you leave, be sure to pitch some specific work. Companies always need a pinch-hitter and who better to fill in than you since you know your way around?

4. Try it on first; moonlight. If you work in the corporate world, you have weekends, evenings and vacations available to you. Work a project on the side. Approach a client that is non-competing to your everyday job and offer your services at a discount or, even better, at "pass-through cost" to get your foot in the door.

Moonlighting allows you to see if you like working from the other side of the desk. As a client, you call the shots. Leaving corporate is a complete role reversal. As a provider, you work to accomplish the client's objectives, not yours. Try out a project or two. Did you have fun? Was doing the heavy lifting for others something you want to do in the long run? Moonlighting allows you risk-free experience to see if you like life as a business owner.

5. Plan your cash flow. Job one is selling. Job two is cash flow planning. When you work in corporate, you have a guaranteed check; same dates each month. On your own, you never know when or where the next payment is coming from. You must have money packed away to handle the cash ebb and flow in the early stages of your company. Can you make the mortgage payment without steady income for six months or, in the worst case, a year?

Most businesses, according to accountants, fail due to cash flow issues. Put together a financial plan not only for business expenses like office space, equipment and staff but also for personal expenses like your mortgage, heat, gas and food bills. How much monthly income do you need and how long will your stash of cash last in the event you are short on any given month? Forecast your income based on active proposals and remember, as the owner, the last person that gets paid is you. The good news is that in good times you get paid well and you also decide the bonus check amount!

The 10 best things about working for yourself

1. You like your boss!
2. You keep your own hours. Work as much or as little as you like. Warning: if you are good, you will be in demand; expect the former.
3. The work is diverse. Working for one company, it's the same products, the same people. When you own your own company, you work on different types of projects, solve different problems and work with new clients that fully appreciate your contribution.
4. Travel as much or as little as you like. Caution: if you target national or global clients, plan to travel and have a sturdy suitcase with wheels.
5. It's fun work. Are you motivated because you love the work or are you looking to make more money? Make sure you love what you do and the money will come. For those looking to make a fortune, beware: It may happen but only if you are passionate about what you do.
6. Constant learning. Running your own business, you are the jack of all trades. You will learn that the more you learn about running your own show, the less you know.
7. No corporate stress. Stress is that which you create or choose not to create. For small-business owners, the number one stress point is having a steady flow of income to pay the bills. The best advice? Start small and grow within your means.
8. Reconnecting with colleagues. You will reconnect with people you haven't talked to in years. Working inside a corporation, your contacts are focused more internally than externally. Enjoy the coffees, the lunches and the reestablishing of collegial relationships.
9. You can dream big or small; stay local or take on global clients. You get to decide whether to expand your business or stay small and nimble. Suit yourself; it's yours!
10. You *really* like your boss!

6. Network. Nothing new here, but it's often overlooked in the business of setting up a business. Get names from your network of contacts and then follow through. The best time to network is when you are new to the game and seeking advice. Schedule coffees, lunches and conference calls with contacts. Ask questions, learn about new methodologies and find out how other researchers built their business. People enjoy telling their success stories and hearing them will spark new ideas for you. Listen actively and you will pick up a tip or two that you can apply. You might even find yourself working together on a project in the future.

Join the industry associations, the chamber of commerce, clubs and business groups in your area of expertise. Offer to speak at events. Accountants and lawyers can also be a good source of referrals. Lawyers trademark new brands and accountants work with local businesses that are looking to expand through marketing. Our payroll service provided a referral. Get contacts from your contacts and then make contact!

7. Find outsource suppliers. As a research provider, you will need an expanded network of suppliers. No longer is the tab expert just down the hall. Start-ups outsource many pieces of a research project vs. hiring internally. Filling your Rolodex with reliable suppliers saves you time when you are bidding a project. What are the best focus group facilities in Seattle? Who can supply video monitoring equipment for an offsite observation? Who can type transcripts? What are some reliable tab houses? Where do I find representative panels for online research? Who can I partner with when I need advanced analytics? What company can quickly and accurately print and mail a written survey? Get referrals; one bad supplier can ruin your client relationship forever.

Before you leave, pay attention and ask questions of your research partners. Was your moderator happy with the recruit? Did the product test run smoothly? Was the data processed on time? Did the cells fill quickly? Take notes, keep a file and ask a lot of questions.

8. The business of business. When you go out on your own, you are not only the research and sales expert, but also the finance, travel, legal, insurance, payroll, accounting, benefits and health care expert. Taking this on can be overwhelming, but as ad man Carl Ally put it, "Either you let your life slip away by not doing the things you want to do or you get up and do them." Get up and get savvy on the business of running your own business.

Find a good accountant. Discuss what kind of corporation should you form. Taxes are inevitable and accountants can help you learn the tax implications of a C corp. vs. an S corp. vs. a LLC. Look up the IRS - yes, the IRS! Find out tax filing dates, forms and expectations. Figure out if you want to file online or via mail. If you don't want to deal with filing forms quarterly, hire a payroll service.

What about retirement planning for small businesses? What health care options exist for small businesses? Call your colleagues and learn what other small businesses do. As the saying goes, "Never a dull moment."

9. Park your ego. You don't know everything, even if you think you do. Set your pride aside and be smart enough to play dumb when you are out of your league. If a client needs a price elasticity study or a forecasting model for a new product, don't take it on unless you have the experience and the technology. Partner with colleagues who are experts and who have the tools needed for the job. Clients appreciate it when you pull in expertise to tackle their problems. You will deliver a better product and will retain clients for the long haul.

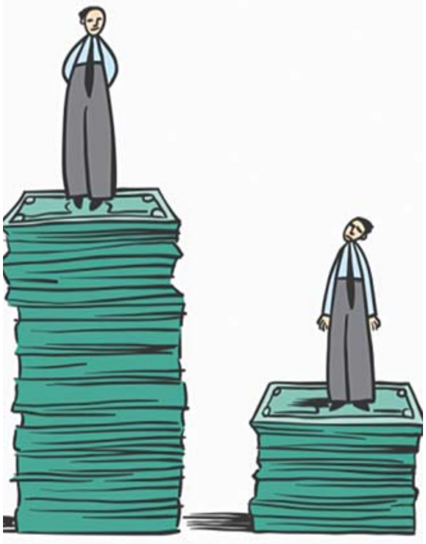
10. Set sail. Your ship won't come in if you lay anchored in the harbor. You won't ever own your own research company unless you go and do it. You have a vision of what it will be like, but remain flexible. The end product will look totally different from where you start. You may begin moderating groups; however, clients want you involved in quant tests that follow. You may find agencies need a planner to pinch-hit on a project. Why not work in partnership? Be open to new opportunity knocking.

Get out and do it

A good sign that you are ready is when you find yourself thinking, "I can do better than this moderator, this analysis, this process, etc." If you find yourself thinking other companies can benefit from your area of expertise, you probably are getting the urge to get out and do it. Once you commit, commit fully. Don't experiment and see how it goes - you have to believe you will be a success. Put your whole heart into it and don't look back. Good luck! | Q

Bucking the tide

First-annual Quirk's salary survey finds client-side researchers expecting a pay bump



By Joseph Rydholm

Perhaps our timing could have been better. After all, fielding a salary survey for the first time during one of the worst economic downturns in U.S. history seems a bit on the cruel side. But to our surprise, no one lashed out in the verbatims or took us to task for our actions. And, far from being a continuation, research industry-style, of the daily tales of career woes found in the media, our results actually had a tinge of optimism to them.

Our 19-question survey was conducted online in June among *Quirk's* subscribers at client-side organizations. We received 864 usable completed surveys and achieved an interval of 3.2 at the 95

Industry	Base Salary	Bonus	Total
Advertising/Public Relations	$91,515	$14,244	$105,759
Agriculture	$77,143	$7,250	$84,393
Automotive	$113,222	$38,360	$151,582
Banking/Financial	$93,076	$23,053	$116,130
Building Material/Products	$82,315	$11,933	$94,249
Computer Hardware/Software	$96,620	$16,753	$113,373
Construction/Housing	$86,146	$22,350	$108,496
Consulting	$107,696	$24,774	$132,471
Consumer Goods	$105,188	$18,708	$123,896
Education	$91,750	$14,789	$106,539
Entertainment	$113,893	$21,682	$135,575
Food/Beverage	$104,170	$20,475	$124,645
Government	$76,577		$76,577
Health Care/Pharma	$106,399	$18,282	$124,680
Hospitality (hotels, restaurants, etc.)	$99,500	$17,333	$116,833
Insurance	$97,616	$26,530	$124,146
Manufacturing	$92,386	$17,577	$109,963
Media/Publishing/Information	$101,495	$35,320	$136,815
Non-profits	$82,714	$7,565	$90,279
Retail	$95,604	$21,643	$117,247
Technology/IT/Web	$76,786	$6,023	$82,809
Telecommunications	$94,750	$13,080	$107,830
Transportation	$70,250	$7,800	$78,050
Travel	$68,201	$7,600	$75,801
Utilities/Energy	$94,191	$10,281	$104,472
Other	$69,587	$10,383	$79,970

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Job Title	Base Salary	Bonus	Total
Owner/President/CEO	$115,714	$31,313	$147,027
Senior Vice President or Vice President	$172,918	$81,604	$254,521
Market Research Manager/Director	$105,840	$17,599	$123,439
Account Executive/Manager	$36,667		$36,667
Customer Insights Manager	$99,653	$22,398	$122,051
Director of Marketing	$106,911	$14,922	$121,832
Marketing Manager	$74,578	$9,918	$84,496
Brand Manager	$117,050	$16,966	$134,016
Communications Director/Manager	$58,250	$5,000	$63,250
Project Manager	$75,730	$7,350	$83,080
Senior Research Analyst	$77,799	$8,841	$86,640
Research Analyst	$59,192	$4,202	$63,394
Business/Market Analyst	$65,519	$5,175	$70,694
Statistician	$80,000		$80,000
Research Assistant	$38,563	$3,192	$41,754
Sales/Account Representative	$62.500	$95,000	$157,500
Administrator/Coordinator	$40,350	$1,750	$42,100
Other	$90,103	$12,045	$102,148

Highest Degree Achieved	Base Salary	Bonus	Total
High school graduate	$80,563	$20,869	$101,432
College graduate	$82,255	$12,641	$94,895
Master's program graduate	$104,968	$23,404	$128,372
PhD graduate	$113,162	$18,784	$131,946

percent confidence level. (Not all respondents answered all questions.)

Expect an increase

Perhaps surprisingly, over half (54 percent) expect their salary to increase in the next year; 42 percent expect it to stay the same and just 4 percent expect a decrease. Of those expecting an increase, 21 percent expect a raise of 1 to 2 percent; 27 percent see a 3 to 4 percent bump. The accompanying tables show survey results by industry, job title, region and company revenues.

In general, our findings show that these client-company researchers are a nomadic, experienced bunch. Thirty percent have been at their current job for three to five years, 22 percent for one to two years and 20 percent for six to 10 years. Twenty-three percent reported having between 16 and 25 years of experience in marketing research (13 percent reported 25 or more years), 21 percent claimed 11 to 15 years and 18 percent have six

Region	Base Salary	Bonus	Total
North East (CT MA ME NH RI VT)	$99,311	$23,939	$123,249
Mid Atlantic (NJ NY PA)	$115,672	$28,120	$143,792
East North Central (IL IN MI OH WI)	$89,973	$17,150	$107,122
West North Central (IA KS MN MO NE ND SD)	$85,159	$13,269	$98,427
South Atlantic (DE FL GA MD NC SC VA WV)	$98,371	$20,861	$119,232
East South Central (AL KY MS TN)	$89,738	$18,761	$108,499
West South Central (AR LA OK TX)	$85,606	$17,634	$103,240
Mountain (AZ CO ID MT NM NV UT WY)	$84,656	$9,731	$94,387
Pacific Coast (AK CA HI OR WA)	$101,270	$19,308	$120,578
Canada	$85,400	$12,872	$98,272
Mexico/Central and South America*	$70,000	$10,000	$80,000
Europe*	$67,280	$7,840	$75,120
Asia*	$110,171	$11,350	$121,521
Africa*	$18,000	$400	$18,400
Australia/New Zealand*	$160,000	$30,000	$190,000
* fewer than 10 responses were received from these regions			

Revenues	Base Salary	Bonus	Total
< $1M	$76,271	$18,909	$95,181
$1M - $3M	$89,128	$20,190	$109,318
$3M - $6M	$70,423	$9,467	$79,890
$6M - $10M	$95,100	$27,783	$122,883
$10M - $50M	$88,344	$32,579	$120,924
$50M - $100M	$70,198	$8,697	$78,895
$100M - $300M	$86,640	$11,386	$98,026
$300M - $500M	$110,885	$13,213	$124,098
> $500M	$104,624	$20,620	$125,243
Govt/Non-profits	$80,983	$7,565	$88,548

Years of Experience in Marketing Research	Base Salary	Bonus	Total
< 1 year	$63,943	$20,189	$84,132
1 - 2 years	$62,797	$7,798	$70,595
3 - 5 years	$73,437	$12,028	$85,465
6 - 10 years	$83,943	$13,801	$97,744
11 - 15 years	$98,706	$14,624	$113,330
16 - 25 years	$118,076	$28,860	$146,935
> 25 years	$125,867	$29,012	$154,879

to 10 years under their belt. The bulk of respondents were in the age ranges of 36 to 45 (34 percent) and 46 to 55 (25 percent).

They are also well-educated: 55 percent have completed a master's program and 37 percent are college graduates.

Some 230 respondents said their organization has one to two full-time marketing research employees, with 182 claiming three to five full-time research staffers and 127 saying they work at firms with more than 25 full-time researchers.

While certain respondent groups said they spend only a portion of their time conducting, coordinating and analyzing marketing research, a sizeable number (43 percent) said they spend more than 76 percent of their time on research-related duties.

Fifty-three percent said they do not supervise any employees; 23 percent supervise one to two workers and 14 percent oversee three to five staffers.

Over half (56 percent) have marketing research budget responsibility. A sampling of the verbatims supplied in answering the budget question paints a picture of the times in which we live:

"2009 budget is down more than 50 percent from 2008 budget."

"In the current economic climate, my budget was pulled and all research is done on an ad hoc basis and funded by the internal client."

"In times of financial hardship, companies tend to cut the market research budget. However, we do a lot of research using internal resources."

"Our company is way underspent in research compared to peers in B2B and companies our size. We are working on a justification to add to staff and increase the size of the budget."

However, one soul sounded this positive note: "When we need to spend money on research, we ask for it and have never been turned down." | Q

"How many years of experience do you have in marketing research?"

Answer	Response	%
< 1 year	27	4%
1 - 2	47	6%
3 - 5	112	15%
6 - 10	138	18%
11 - 15	156	21%
16 - 25	173	23%
> 25	101	13%
Total	754	100%

"How many years have you been at your current job?"

Answer	Response	%
< 1 year	60	8%
1 - 2	163	22%
3 - 5	228	30%
6 - 10	154	20%
11 - 15	73	10%
16 - 25	63	8%
> 25	14	2%
Total	755	100%

"How many marketing research employees (full-time equivalent) are there at your organization?"

Answer	Response	%
0	48	6%
1 - 2	230	30%
3 - 5	182	24%
6 - 10	91	12%
11- 15	53	7%
16 - 25	43	6%
>25	127	16%
Total	774	100%

"How many employees do you supervise?"

Answer	Response	%
0 (None)	392	53%
1 - 2	172	23%
3 - 5	103	14%
6 - 10	43	6%
> 10	35	5%
Total	745	100%

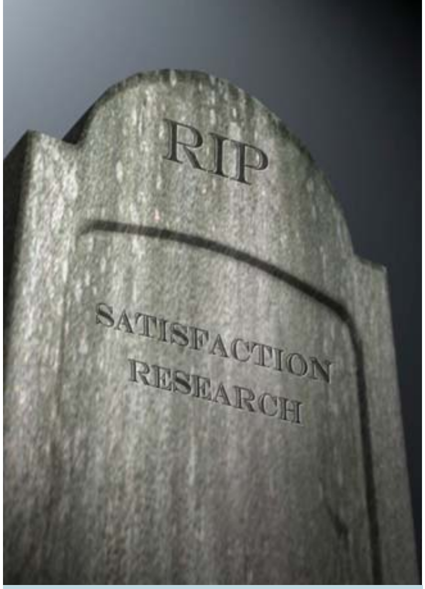
"How much of your work time is spent conducting or coordinating and analyzing marketing research?"

Answer	Response	%
0%	17	2%
< 15%	78	10%
15% - 25%	74	10%
26% - 50%	103	14%
51% - 75%	157	21%
> 76%	327	43%
Total	756	100%

customer satisfaction

Satisfying no longer

Part II: The consequences of bad satisfaction measurement



By Dennis Murphy
and Chris Goodwin

In the July issue of *Quirk's* we identified a number of problems endemic to customer satisfaction. In this second of three articles, we discuss the consequences of those problems. Part III, appearing in the October issue, will suggest potential solutions.

In the previous article, we put the problems into four categories: insubstantial theory, haphazard execution, measurement confiscation and inappropriate application. Each category of problem poses serious dangers for an organization that leans heavily upon customer satisfaction for guidance in improving its business. Using a framework of satisfaction-related assertions, we'll again take a look at those categories to illuminate the major consequences of the mindless or rote pursuit of increasing customer satisfaction measures.

Insubstantial theory

Assertion 1: *Satisfaction is an attitude, not a behavior, and therefore a spurious goal in and of itself.*

Previously we argued that the theoretical foundations underpinning customer satisfaction were weak or at least not fully thought-through before customer satisfaction rose to prominence in the measurement world.

Yes, satisfying customers overall is generally a good thing, but it is a means, not an end. We'll get to what we consider to be the right end a few points from now. For the moment though consider the following scenario.

Imagine reading a baseball game recap extolling the talents of all of the participants: Repurchase laid down a great bunt, Overall Satisfaction hit one out of the park and Recommend gave up two hits in relief.

These are all great things to know, but who won? I may be interested in how the players performed, but that information is relatively empty of value sans a final score. First, did we win or lose – did we make more money or less? Then – and only then – does an individual's contribution matter. Now we can begin to explain the victory or defeat – the true dependent variable – in terms of contributors, and that's precisely the proper role for the most common satisfaction measures. They are intermediate variables at best; their role is primarily explanatory.

snapshot

In part two of a three-part series, the authors continue exploring the perils of improper satisfaction research by outlining some of the errors that can be committed in CSat's name, including measuring the wrong things, pursuing meaningless improvements and misusing the results.

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The consequence of forgetting this is that it leads companies to pursue improvements that may be totally inconsequential to the bottom line.

Observation: If the main purpose of your business is to be popular, you may soon be looking for a new business.

Assertion 2: *Satisfaction always requires context.*

Not only is satisfaction not the desired analytic centerpiece (dependent variable), sometimes it's not even critical support. Consider:

- If there are no alternative choices available to you, at least in the short term, satisfaction is pretty much irrelevant. You're captive.
- If the costs (monetary, physical or emotional) involved in switching are prohibitive, again satisfaction may not be material.

Before agreeing to view satisfaction as even a driver of your business, you need to verify that the assumption is actually valid. As a consequence, while pursuing satisfaction, your company may be ignoring something that is truly required to succeed.

Observation: Satisfaction may matter - then again it may not.

It is not our intent to be dismissive of satisfaction or suggest that you be. It's simply responsible to understand the role it truly plays in your business.

Assertion 3: *There is one business measure that matters most and it's not recommendation!*

We have nothing against recommendation - we even think it's often a very valuable input - but to us the one measure that really matters most is market performance. We'll use market share as the surrogate but recognize that this represents the stream of profit created by an organization. Now that's a measure that we can all cheer on.

Here's the logic chain that should begin to align the players in the proper roles: We desire to make profitable sales and we do that by increasing the number of customers that choose our product. That is the element we should be trying to predict; not overall satisfaction, not repurchase and not recommendation, as they're all simply attitudes, albeit potentially very powerful attitudes. The question then becomes how those attitudes can help drive choice.

Satisfaction measures join a myriad of other potentially explanatory variables to help understand sales. And, too, there is certainly a hierarchy of how sales are measured. It can be as elementary as a constant-sum question (simulated behavior) embedded in a questionnaire, or as sophisticated as a direct connection (reported behavior) to the customer database. The point here, however, is that regardless of methodology, we're no longer addressing some aggregate and correlative relationship but striving for resolution at the individual customer level.

The consequence of sole or high reliance upon repurchase is measurement myopia. Microscopes aren't designed to provide holistic views.

Observation: We don't track satisfaction to enhance satisfaction; we track satisfaction to enhance sales.

Haphazard execution

Assertion 4: *Creating conventions is conventional thinking.*

We posed in the last article that poor execution of the hypotheses around customer satisfaction could lead to consequences that augment those caused by the insubstantial theory underlying customer satisfaction.

Early on it became clear to many organizations that overall customer satisfaction provided an incomplete paradigm. Accordingly, many attempts have been made to "improve the system." Here are some of the most familiar:

A pioneering effort is referred to as the 3M formula. It is the sum of three measures: overall satisfaction, repurchase and recommend (five points each for a potential total of 15 points). That this is a better predictor than a single measure (the two complements do offset some of the shortcomings of overall satisfaction alone) is generally the case.

Fred Reichheld is revered by many as the thought leader in customer satisfaction, as well he should be. When he says that recommend is "the measure that matters most" we believe him, as long as the measurement set is within the realm of customer satisfaction itself. Given that it isn't subject to as many operational caveats as overall satisfaction, this makes sense. But why would you want "just one measure" when the network of information is so much more powerful. And do you really believe that an attitude can supplant behavior (sales)?

Both of these approaches share two significant shortcomings. First they suggest that some kind of "data transformation" equals "data transubstantiation" - that the data transforms into something more meaningful, not just more easily remembered. Second, while they do begin to break from the myth that satisfaction measures are an end unto themselves, their attempts to associate these measures with sales occurs at the aggregate level. Of course, they will correlate reasonably well in aggregate, but that's a far cry from where the problems lie. They must address customer-level predictions.

Jan Hofmeyr has produced the defining work on loyalty and created what for all appearances is a better mousetrap, and his approach does begin to recognize that the sanctity of the information lies at the customer, not aggregate, level. He may even have discovered the "Northwest Passage" but the problem here is that the algorithm remains proprietary.

What truly is called for is an account-level predictive system that is open and accessible to all.

The consequence of conventional thinking is that attention to customer satisfaction can do as much harm as good.

Observation: Making diamonds from coal takes a lot of squeezing - and usually a lot of coal. Seek diamond mines.

Assertion 5: *Performance is not an absolute measure.*

That baseball team of ours played a triple-header yesterday. They scored two runs in the first game, six runs in the second and seven in the third game, for an average score of five. Anything above average we consider "good," so it looks like our team is two for three and actually improved over the course of three games.

In reality, we lost all three games. Here again we have a kind of "missing the measure that matters most" problem based upon data reduction rather than data enrichment. Instead of expanding our horizon to incorporate competitive references, we contracted our assessment to a single, limited measure. This is ludicrous when applied to baseball, why not then to business as well?

If satisfaction does mean something, then acting on that meaning certainly is not about simply increasing your score every year. It demands a competitive context. In the context of the ballgame, if the other team scored two runs a game, we'd be undefeated, but if they had scored eight runs a game, we'd be winless. If your best customer gives you "a seven this year and an eight next" is that a good thing? Well, yes, unless your primary competitor improves from a six to a nine.

Using internal products or categories to benchmark is also spurious. If your company rewards Product A for an 8.2 performance more than Product B for a 7.8 without benefit of a competitive context, the reward may be an erroneous one. The more a product category is subject to complexity, the lower the scores all brands within that category receive. For instance, in IT the 8.2 might be a low hardware category score while the 7.8 could well be an outstanding software category performance. Internal comparisons are easy but they're also often inappropriate. (Keep this fact in mind when reading the final point.)

The consequence is that satisfaction scores without a valid, competitive context provide ambiguous guidance to decision makers at best and completely wrong guidance at worst.

Observation: Markets are based upon competition. Why, then, shouldn't satisfaction be too?

Assertion 6: *Methodology drives results.*

How surveys are conducted always has a sizable impact upon the results received. Here are some things to consider:

- If the work is done off of known customer lists of an organization, response rates are quite good (and research is cheap). That said, the competitive picture is likely to be poorly or inaccurately represented. If the sponsoring company is identified to the respondent, rates go up but then so does the possibility of experimenter demand: if they know that they'll be identified to you, they often exaggerate pleasure; and if safely blind, then perhaps displeasure. Also, you'll miss those important customers residing outside the database.
- If the work is done double-blind (you don't know who is responding and they don't know who is asking), it is always the most objective. It is also the most expensive because response rates are lower and it may take a ton of sample to fill the brand quotas. If your company is not identified, response rates are always lower than if they know who you are - but they are generally free of the most obvious biases.

For tough-to-find users, some research providers fill quotas by deploying "non-random" recruitment. This can result in extraordinary scores. If users are scarce and you must use unusual recruitment tactics, such as user groups or communities, a brand will receive abnormally positive ratings simply because of exclusivity. Large brands have a fairly normally distributed user group; niche brands almost always skew positively. It's for "those in the know."

Customer satisfaction seems so intuitive that anyone can manage a program but if we are able to demonstrate anything through this series of articles, it is that managing a customer satisfaction program demands real expertise, not a weekend of training for the executive put in charge.

The consequence of the amateur approach is that smart executives can easily be led to the wrong conclusions by problems that are invisible in the reporting of customer satisfaction scores.

Observation: Without extreme vigilance, technical incompetency goes unexposed.

Measurement confiscation

Assertion 7: *Customer feedback is a gift, not an obligation.*

Measurement confiscation refers to the hijacking of customer satisfaction instruments for other goals. It's not, as it may seem, a harmless and more efficient use of scarce resources.

In recent years, every department within organizations has appealed for a slot in the customer satisfaction survey. The reason why will be discussed in the final point. There is a very fundamental flaw in this thinking though. It presumes that your customer has the interest and the capacity to dissect your business at a level of detail emulating your own. This capability is rare and any interest on the customer's part in doing so is even rarer.

Few things matter to your customers the same way they matter to you - a very common and human condition. Egocentric thinking is reflected in most every group. Brand managers believe that "cool and crisp" might be received differently than "crisp and cool"; procurement departments desperately (and generally futilely) want to be "a big deal" and discover that their changes in policy drive real changes in revenue; and sales executives want to fine-tune their smile and handshake as if it's their personal charm and not the quality of their company's products that makes sales.

Observation: Company departments and individuals have no inalienable right to be measured. Contributions must be distinguishable and relevant and then customers need care enough to actually respond to a survey.

The sad truth is that life is never as much about "us" as we believe it to be. In the business environment customers aren't product designers, they're product choosers. They generally can't detect Yakima Valley hops or quote monitor resolution. They just "know what they like and buy it." Think ambience over analytics.

The consequence of asking too much of respondents is that not only do you get distracting findings on measures that don't matter, you also bore and fatigue your respondents to the point where they can't give you accurate feedback on the measures that do matter.

Observation: Customers focus more upon what comes out of a product than what goes into it - as well they should. It isn't about what the product does so much as what the product does for them.

Bonus observation: The paradox is that the folks who least understand that it's the "end" that matters are often the folks charged with fixing the "means."

Assertion 8: *Respondents answer best what matters most - to them!*

A favorite hotel chain of one of the authors asks guests to rate it on 50 different items - 45 of which are immaterial to a guest's experience. What's worse, they then ask guests to grade competitors that the author seldom if ever stays at on the same battery. This writer now understands why it's called a battery because that's what I feel the victim of when the survey is finally complete. More often than not I drop out without completing.

A sure way to lose survey respondents is to ask them to do exercises that are either boring or of no relevance to them. Customer satisfaction work, often guilty here, queries customers ad infinitum on issues that have little or no consequence to them. If the survey is too long or too boring, respondents will either drop out early or give quick, random input. The former is bad but the latter is worse. As a consequence, we incorporate garbage into supposedly meaningful scores.

Observation: Most surveys pursue what the client expects to hear at the expense of what the respondent actually has to say. This is an enormous missed opportunity.

Inappropriate application

Assertion 9: *Well-meaning associates will inappropriately use your customer satisfaction data if you don't prevent them. Doing so is your responsibility.*

The inappropriate application of customer satisfaction, as we have previously written, stems from the politics of customer satisfaction, which has changed the goal from pleasing the customer to pleasing the organization. This leads us to our final two consequences.

Somewhere over the past few years, in lemming fashion, organizations have completely flipped the orientation of satisfaction data. What originated as a method to better satisfy the customer lives on today as a performance measure of the organization itself. Sadly, most customer satisfaction systems care far more about parsing out internal credit and/or blame than truly capturing the relationship between the brand and its customers. And, adding insult to injury, they don't even parse very well.

The design of most customer satisfaction work is largely an analog of how the organization operates. The rationale goes something like this: The contribution of individual departments can be teased out using customer satisfaction scores. Then, each individual department can work independently to do its part to increase overall scores. Collecting this data is, of course, presumed to be a turnkey operation. In reality it's anything but. As compelling as it might be to quiz customers on each and every component of their experience, the sad truth is that they care very little about what you do and a great deal about what they get. Either we've forgotten that or don't know how to explain it to top management.

Think about it: customers do not owe any organization feedback on their performance. It is either a gift that customers bestow upon you, or a service they perform for some gratuity or level of remuneration. Your customers don't like taking surveys any more than you do. It's a job and every job has a cost associated with it. The consequence of misappropriation is that you often get respondents who aren't your best customers providing feedback on issues that are not important to most customers, and that may have nothing to do with why they buy your products.

Observation: Who took the customer out of customer satisfaction?

Assertion 10: *The inclusion of customer satisfaction in compensation is well-intentioned but misbegotten.*

The "white flag" of customer satisfaction occurs the day it becomes a part of any organization's scorecard or dashboard. While this move seems so logical and appealing, it always has devastating effects. Everyone wants in on the measurement action. A rising score may entitle you to some additional slice of the bonus-pool pie. So what's wrong with that?

Observation: The goal of customer satisfaction is thoroughly corrupted when it transforms from the altruistic service of better pleasing customers to the unfettered purpose of serving oneself.

Every game known to organizations kicks into play. We've seen normally responsible company executives coerce customers, hide sample and dispute scores and research methodology even when they know absolutely nothing about research. Here is an almost verbatim conversation we had once with an executive whose bonus depended on the customer satisfaction score:

Executive: "I don't have a Ph.D. in research, but I went to my company's training session on customer satisfaction and I know that is not how that question should be asked."

Researcher: "I do have a Ph.D. in research, I designed the training session you attended, and I can assure you that is exactly how the question should be asked."

Executive: "Well, then, you must have made a mistake because 'The Score' could not possibly have gone down this year after all the hard work we did."

Observation: Sadly, the analyst who once was a partner to decision-making executives is now the police.

Finally, as if these issues weren't bad enough, these same executives who depend on customer satisfaction scores for their bonus often underfund the customer satisfaction research. The samples are almost never large enough to provide confidence intervals smaller than the goals which are set. In other words, organizations often set customer satisfaction goals that can be met or missed solely based on the variation inherent in using a random sample. Said otherwise, the bonuses awarded are random and indefensible.

The consequence is that organizations do not reward that behavior as they intended, and are thus without the benefits they intended.

And finally, recall the beginning conversation of this article. Enhancing customer satisfaction may be completely extraneous to the well-being of your firm. Yikes!

Observation: If asked to install customer satisfaction data into your compensation formula, turn and run! Doing so completes the transubstantiation from customer satisfaction to corporate satisfaction.

In the October issue, our final article will propose some fixes to the problems of customer satisfaction that help to avoid the worst consequences of a program gone awry. | Q

The quest for the ideal marketing researcher

Wanted: a good communicator with a healthy curiosity

By Bonnie Eisenfeld

Over the years, I have hired many marketing researchers as employees, contractors and vendors. Learning from my successes and failures, I have developed a profile of the desired education, experience, skills and other characteristics of the ideal marketing researcher.

Some of these characteristics, which I outline below, may be identified through resumes, individual and group interviews, references and research papers written by the candidates. However, some may emerge only through working side by side with a person. The best approach is to hire part-timers or contractors who have the potential to be hired full-time later on. This method works as a way to observe and test researchers' abilities, many of which cannot be predicted.

Both halves

Brain theory says that the left brain is more logical, linear, inductive and analytical, while the right brain is more visual, intuitive, creative and imaginative. The market research profession requires both talents, so the best researchers utilize both halves of their brains. After sifting through mounds of data, an ideal marketing researcher will report insights and meaning derived from the data rather than just summarizing the data.

To gauge a potential hire's abilities, I recommend looking for evidence based on education, abilities and interests. For the left-brain side, look for quantitative and logical coursework; for the right-brain side, look for literature, languages, visual arts and music. Some of my most successful hires had degrees in literature or languages, followed by a business education.

Advanced degree

To me, the best educational background for a marketing researcher is an advanced degree in the social sciences, particularly cultural anthropology, ethnography, sociology or psychology and at least basic statistics. Additional subjects of value are marketing, marketing research, communications, business strategy, geography, foreign cultures and languages.

Market research techniques originate from the social science disciplines. In social sciences courses, students learn a variety of information-gathering methods, particularly surveys, interviewing and observation, as well as various analytic methods. By the

snapshot

Looking to enter the marketing research field? Make sure you have a varied educational background, an ongoing love of learning and a flexible nature. Oh, and don't forget to use both sides of your brain.

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time they have an advanced degree in one of these subjects, they have learned to be proficient in searching for published research and writing research reports. Basic writing skills are essential; a manager certainly does not want to have to correct grammar and sentence structure.

Interpret findings

Marketing researchers with psychology training can interpret findings in light of underlying human needs. For example, in a study of international banking, business respondents listed many problems, questions and grievances concerning their foreign banking transactions. These businesspeople needed daily communication about what was happening with their foreign transactions. We all heard the same words, but the researcher, a psychologist, was able to see underneath the complaints to the underlying psychology and to describe the respondents' feelings of insecurity regarding foreign languages, currencies and measurement matters.

Lifelong learners

The best researchers are avid readers, travelers, online searchers or news junkies - in short, lifelong learners. Their accumulated knowledge and skills are often applied in surprising ways. For example, analogies from evolutionary biology can help explain the competitive situation in a market.

Researchers are curious people. They want to know about human behavior, attitudes and opinions and their underlying reasons and motivations. A curious person asks questions, listens carefully to the answers and probes for more information from respondents.

One test for curiosity in the hiring process is to observe how many questions the candidate asks in the interview, particularly questions on subjects other than compensation. However, watching a candidate conduct a research interview or focus group is the better test.

In addition to a healthy curiosity, a researcher also needs to be able to communicate through multiple channels (detailed reports, recordings, visual presentations, etc.) to enable disparate audiences to understand the findings. Whatever it takes, the researcher must stay focused on the objectives and use the processed information to produce, communicate and interpret findings so they are clear, concise, interesting and actionable.

The best marketing researchers are those who understand qualitative and quantitative methods and can explain them in simple terms to audiences of all educational backgrounds. For example, not everyone understands statistical terminology, so results need to be expressed in plain English. At minimum, when presenting percentages, the researcher should say percentage of what. Researchers should also be prepared to explain what certain terms mean, such as statistical significance, sample size, correlation, confidence interval, sampling error and the like.

In the hiring process, it is important to ask for a research paper, perhaps an academic one, not just a writing sample, and review it for clarity and logic. In the interview, ask the candidate to explain some complex subject about which they have knowledge to see if they can do so in simple terms.

Adapted easily

In addition to a decorated academic background, successful hires must be able to adapt easily and grasp that brevity is prized in the business world. New researchers have to get used to corporate deadlines and move faster, sometimes sacrificing methodological precision, and sometimes arriving at conclusions with less-than-perfect data.

In addition to a broad educational background, I advise new entrants to get experience as an interviewer. There is no substitute for the learning you acquire from actually conducting an interview. It informs your ability to write a real-life questionnaire that respondents will be willing to answer.

Act as a partner

The in-house researcher is not just a messenger between corporate management and an outside vendor. Ideally, a researcher should act as a partner with the strategist or decision maker. He or she must understand the context and information needs of the business and, based on management's research objectives, help create questions and then collect data to answer the questions. Thus, every researcher should take advantage of opportunities for education and training offered by their organization to obtain the business knowledge necessary for context.

Code of ethics

Marketing researchers should be guided by a code of ethics, such as the CASRO (Council of American Survey Research Consultants) Code of Standards and Ethics for Survey Research (www.casro.org/codeofstandards.cfm), which spells out a researcher's responsibilities to respondents, clients, the public, contractors and interviewers.

Examples of situations testing a marketing researcher's ethics might include demands from managers or clients to alter findings or reveal information from an individual respondent. In certain situations, a researcher might have to put his or her job or client relationship on the line to maintain ethical behavior. As in any such dilemma, the best course is to establish and maintain a reputation for honesty, integrity and trustworthiness. It is difficult to find out about a candidate's ethics during the hiring process, but you may be able to use certain hypothetical situations in the interview.

Only conduit

Marketing researchers provide a valuable service to consumers by communicating their unfulfilled needs and dissatisfactions to the corporate world. As advocates for the consumer, researchers may often be the only conduit between the consumer and the manufacturer, particularly in cases where the buyer is different from the user. Whether we are reporting on health plans or dog food, ultimately someone may benefit from the knowledge we have gained and communicated upward. Hopefully, this knowledge leads to a better product or service. At minimum, we know we have sent the message to the person who has the power to make improvements. | Q

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the economy and many have changed their thinking and/or behavior related to shopping: 77 percent are concerned about how the economy will affect their families' future; 66 percent pay attention to advertising that features items for sale at the mall; 75 percent say discounts on mall-purchased items are more important to them than they used to be; 37 percent of teen mall shoppers say they go to the mall less often than they did six months ago; 62 percent say their frequency of visiting malls has increased or stayed the same; and 54 percent say they have spent more or about the same amount of money on a typical visit to the mall then they did six months ago. For more information visit www.arbitron.com.

Back up your green claims - consumers are watching!

Twenty-three percent of U.S. consumers say they have no way of knowing if a product is green or actually does what it claims, according to research from BBMG, a New York branding company. But 77 percent agree that they can make a positive difference by purchasing products from socially- or environmentally-responsible companies and are actively seeking information to verify green claims.

To find the necessary information, consumers are most likely to turn to consumer reports (29 percent), look at certification seals or labels on products (28 percent), consider the list of ingredients on products (27 percent) and least likely to look to statements on product packaging (11 percent) or believe company advertising (5 percent).

Mitch Baranowski, co-founder of BBMG, says that "At a time of growing demand for accountability, consumers are rewarding brands that align with their values, punishing those that don't and spreading the word with their family, friends and peers."

When asked unaided which companies come to mind as the most socially- or environmentally-responsible companies, 7 percent of Americans named Wal-Mart; 6 percent said Johnson & Johnson; 4 percent Procter & Gamble; 4 percent GE; and 3 percent Whole Foods. When asked to name the least-responsible companies, 9 percent named Wal-Mart; 9 percent said Exxon Mobile; 3 percent GM; 3 percent Ford; 2 percent Shell; and 2 percent McDonald's.

Forty-one percent of Americans could not name a single company that they consider the most socially- and environmentally-responsible. Seventy-one percent of consumers agree that they avoid purchasing from companies whose practices they disagree with. Fifty-five percent refer products based on a company's social and environmental practices, and 48 percent tell others to discontinue using products based on a company's social and environmental practices.

Raphael Bemporad, co-founder of BBMG, says "Consumers are redefining what truly matters and evaluating purchases based on both value and values. By delivering price, performance and purpose brands will be able to close the green trust gap." For more information visit www.bbmg.com.

Literal WOM more influential than virtual

Referring a product or service is not a new idea - it's been around as long as people have - but is the way people make recommendations changing with the times? Despite increased online activity, real-life referrals are still more influential to consumers than those received online, according to a study conducted by Chicago research company Mintel.

Most people who bought a product or service based off a recommendation did so on a referral from a friend/relative or husband/wife/partner (34 percent and 25 percent, respectively). Only 5 percent of respondents bought based on the recommendation of a blogger, the same for a chat room.

"It's interesting to find that as much time as we spend online, we still prefer a personal recommendation from someone we know and trust," says Chris Haack, senior analyst at Mintel. "Young adults are somewhat more likely to turn to the Internet for advice and referrals, but even they listen to their peers first."

Most people base a recommendation on price and convenience. Especially in the current economic climate, where shoppers are compelled to find the lowest price, it's not surprising that more than 64 percent of respondents state that price drove them to recommend a product or service, while quality (55 percent) and convenience (33 percent) follow behind.

Asian and Hispanic respondents are considerably more likely to recommend a product they saw advertised. Asians (14 percent) and Hispanics (10 percent) are also more likely to report being influenced by bloggers to purchase a specific product or service.

"The sheer number of people that purchase based on recommendations proves marketers need to pay attention to word of mouth," says Haack. "It's becoming easier for businesses to lose control of their marketing messages, so companies need to carefully monitor and respond to consumer conversations about their brands." For more information visit www.mintel.com.

Women skip the lipstick testers and shop online

The state of the economy appears to be taking its toll on beauty purchases across most retail channels, with the exception of one: the Internet. According to Emerging Channels Series: Beauty Care Products, Special Focus: The Internet, a study from Port Washington, N.Y., research company The NPD Group, the Internet gained one percentage point and was the only retail channel to experience an increase in the number of women who reported mentions for beauty products.

The Internet has a higher ratio of women saying they spent more, relative to those who said they spent less on beauty in the past year. The average annual beauty spending per woman is $86 for this channel. The ease of shopping online and product availability continues to be what is driving Internet shoppers who spend more via this channel than in the prior year.

Women who spent more on the Internet also purchased more beauty products in general and started buying more expensive brands and products than in the previous year. Higher gas prices also had a positive impact on Internet spending. More consumers opted to shop for and buy beauty products online, instead of driving to a store.

About two in three Internet shoppers who shopped for beauty online, but did not make a purchase, said they use the Internet to gather information and make price comparisons through different Web sites, preferably ones that offer various brands or a combination of multibrand and single-brand Web sites. For more information visit www.npd.com.

Most see global warming as fact, not fiction

If doubt is an impediment to effective action, then it's good news that nearly two-thirds of those surveyed in a study feel global warming is scientifically demonstrable. When asked by Denver-based Resolution Research whether global warming was a "scientific fact" or "merely a theory," 62 percent said it was fact. Perhaps it is even better news that fully 77 percent of the respondents under the age of 25 agree that the reality of global warming has been made evident by science. Those who feel global warming is "merely a theory" are somewhat more likely to live in rural settings, and substantially more likely to be Republican. While 50 percent of the Republicans feel global warming is a matter of speculation, only 11 percent of the Democrats feel the issue is merely a theory.

Those within the Obama administration whose efforts focus on creating a greener economy will probably see good news in the finding that 58 percent of the Democrats and 49 percent of the Independents feel the government should be regulating U.S. business compliance with green practices. Far fewer of the Republicans (30 percent) were inclined to agree. There is also evidence of increasing support for governmental regulations regarding green practices among individuals; a sentiment more pronounced among Democrats (43 percent) than either Republicans (23 percent) or Independents (26 percent).

And lastly, if despair is an impediment to effective action, then it's probably good news that only 6 percent of the respondents are convinced that too much damage has already been done to meaningfully curb its effects. In contrast, 57 percent feel current efforts to curb global warming are headed in the right direction and 36 percent feel our collective response needs to be all the more intensified if we are to succeed in minimizing its impact.

Overall, the survey findings might suggest that there's cause for a bit of polite celebration for a movement that began protesting the environmental apathy so prevalent on the first Earth Day in 1970. What began at a time when only 1 percent of the population expressed appreciable concern about the environment has grown today into a sizeable group who are convinced of the scientific validity that climate change poses an imminent threat. A vast majority now feel that continued and concerted action is needed at both the individual and institutional levels to effectively address it. As movements go, that's probably good news. For more information visit www.resolutionresearch.com.

Product and Service Update

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Gongos also offers a "licensing plus" option, for companies that want to manage and moderate the community process within their organization. Also new to its spectrum of offerings is the Quick Start Community, a private spin-off community that can be initiated through Consumer Village, the company's consumer community. For more information visit www.gongos.com.

SPSS enhances predictive analytics software

Chicago research software company SPSS has achieved full support of version 4.0 of the predictive model markup language (PMML), a standard for statistical and data mining models from the Data Mining Group, and will incorporate PMML 4.0 into upcoming versions of PASW Modeler data mining workbench and PASW Statistics.

Additionally, SPSS's predictive analytics software has been integrated with Language Weaver, a Marina del Rey, Calif., translation company. The integration is designed to allow users to obtain automated, on-demand translation of unstructured data sources across 30 languages into common English. For more information visit www.spss.com.

Briefly

FocusVision Worldwide, a Stamford, Conn., research company, has launched FocusVision SuperMobi, an online qualitative solution designed to allow researchers to conduct ethnography, in-home interviews, shop-alongs and car clinics from their computers. The solution relies on wireless networks to deliver live videostreaming from remote locations. SuperMobi consists of a portable camera and microphone, operated by a videographer provided by FocusVision. The service includes the standard FocusVision features: VideoMarker software, technical support and a one-year online archive. For more information visit www.focusvision.com/prod_mandsm.html.

TVG Marketing Research and Consulting, Dresher, Pa., has launched a category of services designed to analyze and interpret secondary marketing research data. TVG will offer integration of data from multiple sources with primary qualitative and quantitative research; and outsourced, on-demand services ranging from discrete projects to retainer services for ongoing marketing analysis. For more information visit www.tvg-inc.com.

Columbia, Md., research company Arbitron Inc. has introduced ARB-TV, a suite of audience measurement services designed to improve visibility into away-from-home television audiences. The ARB-TV analytical tool is intended to complement existing data services, including Arbitron's Portable People Meter, and to help advertisers plan how to reach their audience. For more information visit www.arbitron.com.

Western Wats, an Orem, Utah, research company, has released Version 3 of Data Express, a data reporting tool designed to allow clients to view and manage survey data as it is being collected. New features include drag-and-drop crosstab creation windows; a redesigned filter toolbar for easier report generation; enhanced charts; more trending options; customizable color schemes; and a filter wizard that walks users through each step of report creation. Data Express is included free of charge for Western Wats clients. For more information visit www.westernwats.com.

Denver research company iModerate Digital Research Inc., Kennebunk, Maine, has introduced its Waggle service, a private, social networking community platform designed to listen to consumers and anticipate trends without asking questions. For more information visit www.driwaggle.com.

Ipsos Understanding UnLtd., a Cincinnati division of Paris research company Ipsos, has launched QualSpace, an approach intended to bring qualitative research to an online environment using an interactive virtual bulletin board where qualitative researchers from Ipsos Understanding UnLtd. facilitate three-day to nine-month discussions around topics relevant to the client's needs. The online methodology aims to allow for increased flexibility, creativity and customization. For more information visit www.ipsos-uu.com.

has introduced a revised version of Optimum!nsight, an instant message-based, in-depth qualitative solution designed to provide maximum flexibility and customization of consumer insights. Optimum!nsight utilizes iModerate's live, moderated, online one-on-one interview sessions to deliver the results to the client in a flexible manner. The solution has no set number of participants, time limit or geographic boundaries. For more information visit www.imoderate.com.

Skopos, a London research company, has rolled out m-Suite, its collection of mobile-based qualitative and quantitative research tools designed to enable respondents to access and carry out surveys, polls, interviews, diaries, observational photo capture and video VoxPops via their mobile phones. For more information visit www.skopos-mr.co.uk.

London research company Cognicient has launched Link Dashboard, a program intended to help customers identify which survey questions have the greatest impact on their business and which questions are unproductive and redundant. Link Dashboard has been designed to work with Cognicient's Link Manager tool. For more information visit www.cognicient.com.

(Editor's note: The following is a corrected version of an entry from the June issue which contained an incorrect Web address.) St. Louis communications company ej4 has released Instant Video Presenter, a software application that allows users to create newsroom-style videos quickly. The application is a video capture application, so no post-production process, compression or editing is needed. When the video is done being recorded, the file is ready to be deployed through e-mail, uploaded to the Internet or burned to CD. Instant Video Presenter includes a green screen and sells for $259.99. A free trial version is available. For more information visit www.instantvideopresenter.com.

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company, from Microsoft for $40 million. Greenfield Online, owner of Ciao Surveys, was acquired by Microsoft in 2008. Microsoft will maintain ownership of Ciao's online shopping comparison service. Integration of Toluna and Greenfield will begin immediately.

TrendSource Inc., a San Diego research company, has acquired **Examine Your Practice**, a San Diego mystery shopping firm. TrendSource intends to use the acquisition to expand in the health care sector.

Alliances/strategic partnerships

Zogby International, a Utica, N.Y., research company, and **463 Communications**, a Washington, D.C., have partnered on a joint venture called **Zogby463**, which aims to combine Zogby's polling and 463's strategic planning and communications capabilities.

QSR International, a Doncaster, Australia, research software company, has partnered with **StatWorks**, a Selangor, Malaysia, analytics firm. Under the partnership, QSR will manage QSR's reseller network in Malaysia and Singapore and deliver local support for its software.

Digimarc Corporation, a Beaverton, Ore., technology firm, and New York researcher **The Nielsen Company** have partnered to launch two companies. Each company will own roughly one-half of each joint venture. Digimarc is expected to account for the operations of the joint ventures under the equity method of accounting and will report its portion of the net results of the entities based on its ownership share. Both Nielsen and Digimarc will provide shared general overhead services to the joint ventures.

Awards/rankings

Chicago research company **SPSS Inc.** has been awarded a 2009 SAP Pinnacle Award in the category BusinessObjects Software Partner by **SAP**, a Walldorf, Germany, business software organization.

Kadence International, London, has been named the greenest market research company in the U.K., according to The Sunday Times Best Green Companies in Britain list. The company ranked 46th and was the only market research company to appear on the list.

Joaquin (Sonny) Garcia, vice president, sales, of Dallas research company e-Rewards Inc., has been selected to the *Dallas Business Journal*'s 40 Under Forty Awards program. The program recognizes highly-accomplished executives and entrepreneurs under the age of 40 who have a proven track record of excellence and leadership.

Sandra Bauman, president of Bauman Research and Consulting LLC, a Glen Rock, N.J., research firm, has been named the 2009 Business Woman of the Year by the **New Jersey Association of Women Business Owners** (NJAWBO), West Windsor, N.J. The award recognizes a woman business owner who distinguishes herself in her business, her community and in NJAWBO and is a positive role model for women in other areas of life.

Ladd Research Group, Cincinnati, has received a Small Business Excellence Award from the **Cincinnati USA Regional Chamber of Commerce**. The award recognizes the top 10 businesses with fewer than 10 employees.

The Marketing Research Association (MRA), Glastonbury, Conn., has awarded **Michael Mermelstein**, G2 and Associates, with the 2009 Honorary Lifetime Membership Award for his outstanding volunteer service.

The MRA has also awarded the Distinguished Service Award to **Colleen Moore Mezler**, Moore Research Services, and **Ed Sugar**, OLC Global, and the Award of Excellence to **Angela Lorinchak**, Metro Research Services. The Chapter of the Year award was presented to the **Atlanta/Southeast chapter** of the MRA.

Five research companies have been named to the **Honomichl Top 50** for the first time: **Communispace**, Boston, 27; **Iconoculture**, Minneapolis, 40; **CMI**, Atlanta, 45; **Chadwick Martin Bailey**, Boston, 47; and **Roger Green and Associates**, New Hope, Pa., 50. The Honomichl Top 50 includes the highest-ranked U.S. research companies by annual revenue and is published in *Marketing News*.

David Morse, president and CEO of New American Dimensions, a Los Angeles research company, has been awarded the HispanSource Award for Excellence in Hispanic Marketing Research by **Aguilar Productions**, a St. Paul event marketing firm.

New accounts/projects

The Leisure Trends Group (LTG), a Boulder, Colo., research company, has signed an agreement with **Nielsen Claritas**, a San Diego division of New York researcher The Nielsen Company, to integrate LTG's Most Active Americans Panel of consumers who buy leisure and sport products and services with Nielsen's PRIZM market segmentation.

Sage North America, a division of London software company The Sage Group plc, has selected Reston, Va., research software company **Clarabridge** to automate and analyze text-based customer feedback from surveys conducted across Sage's business management software product lines.

Procter & Gamble, Cincinnati, has selected Chicago research software company **SPSS Inc.**'s predictive analytics software to manage the research lifecycle.

New companies/new divisions/relocations/expansions

Echo Research, London, has opened an Asian head office in Singapore. Michelle Allen will lead the office as regional manager.

Karen Flake has launched **Karen Flake and Associates**, a qualitative research company. The company is located at 28 St. John's Place, Little Rock, Ark. Dawn Adams will serve as research director. Both Flake and Adams provide moderating services.

The company is online at www.karen-flakeassociates.com.

Nunwood, a Leeds, U.K., research company has launched Fizz, its knowledge management business, in New York.

Alex Sweeney and Alasdair Johnston have formed **Clarity Strategic Research**, a Sydney, Australia, research company. The company is online at www.claritystrategicresearch.com.au.

Dexterity, a Chennai, India, research company, has made its Columbus, Ohio, office its U.S. headquarters. Dexterity CEO Palanivel Kuppusamy has relocated to the Columbus location.

Media Monitors, a White Plains, N.Y., research company has opened a London office.

GfK Healthcare, a Blue Bell, Pa., division of Nuremberg, Germany, research company The GfK Group, has launched its managed markets practice area, a full-service research and consulting business unit focused on the needs of pharmaceutical clients. The unit will conduct ad hoc qualitative projects, mock pharmacy and therapeutics committee meetings, advisory boards, convention focus groups and quantitative projects.

Research company earnings/ financial news

National Research Corporation, Lincoln, Neb., announced results for the first quarter ended March 31, 2009. Revenue for the quarter was $16.7 million, compared to $13.5 million for the same quarter in 2008. Net income was $2.7 million, or $.40 per basic and $.39 per diluted share, compared to $2.0 million for the first quarter 2008, or $.29 per basic and diluted share.

The GfK Group, Nuremberg, Germany, reported first-quarter 2009 sales of EUR 264.7 million, compared to EUR 268.1 million the previous year. The organic growth rate was (4.6) percent. Adjusted operating income totaled EUR 14.8 million and was 35.7 percent lower than prior-year period. The margin stood at 5.6 percent, compared with 8.6 percent in the prior-year period.

Confirmit, Oslo, Norway, announced its first-quarter results, delivering double-digit organic growth. Revenue from new clients for the quarter was at an all-time high for the third consecutive quarter.

Highlights of Confirmit's first-quarter 2009 performance include: a seven-figure contract for its customer feedback program; the third successive quarter of record-breaking new business growth; the release of Confirmit Horizons, the company's multichannel platform for market research, customer feedback and employee feedback; and a three-year contract with Rackspace.

Names of Note

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Curt Stenger has joined *ThinkVine*, a Cincinnati research company, as vice president, analytic services.

The Universal Survey Center, New York, has appointed **Brendan Sammon** as vice president, client services.

The Dallas Morning News has named **Fran Wills** senior vice president, interactive. Research will be among her responsibilities.

Cint USA, the U.S. division of Stockholm, Sweden, research company Cint, has named **Lindsay Veling** senior sales director in Toronto. Additionally, **Marc McDonough** has joined Cint USA's sales team. McDonough will be the inaugural member of Cint's Indiana office.

Evan Goldfarb has been hired as business director, entertainment division, of *The NPD Group*, a Port Washington, N.Y., research company.

InsightExpress, a Stamford, Conn., research company, has promoted **Elise Neel** to national sales director for its digital media measurement team.

David Day has been named global CEO of *Lightspeed Research*, Princeton, N.J.

Rentrak Corporation, a Portland, Ore., research company, has hired **Bill Livek** as CEO and director.

Discovery Channel, Silver Spring, Md., has hired **Steve McGowan** as senior vice president, research.

Jason Scott, senior vice president, *EMI Surveys*, has been elected to his second term as a membership chair on the board of directors for the Great Lakes Chapter of the Market Research Association, Glastonbury, Conn.

Survey Technology and Research Center, Allentown, Pa., has hired **Lisa Guest** as assistant supervisor; **Traci Fletcher** as project manager; **Yvonne Shands** as survey support manager; **Dan Schmitt** as vice president, sales and marketing; and **Derrick Lacey** as programmer.

Kristopher Bober has joined *Polaris Marketing Research Inc.*, Atlanta, as project manager.

New York researcher *The Nielsen Company* has appointed **James M. Kilts** as chairman of its supervisory board of directors.

Research Now, London, has made three additions to its U.K. sales organization: **Emel Mohammadally**, director, client development, and **Steve Groom** and **Tony Glover** as associate directors.

Jay Guyther has joined Los Angeles research company *ROI Media Solutions Inc.* to develop custom management plans for radio broadcast groups. SmartRevenue, a Stamford, Conn., research company has named **Candace Adams** president, global retail strategy.

The National Centre for Social Research, London, has appointed **Penny Young** as the new chief executive, following the retirement of Norman Glass.

index of advertisers

By Joseph Rydholm
Quirk's editor

It's not easy being green

I don't envy the purveyors of green products these days. With many of their offerings sporting higher price tags than competing, ostensibly less eco-friendly products, they now have to battle the New Austerity along with general perceptions that green claims are not always what they seem to be.

Even younger consumers, who in theory are leading the eco-awareness charge, aren't immune to waffling when it comes time to put their money where their mouth is. A study of Millennials from Generate Insight, an internal research division of Generate, a Santa Monica, Calif., media company, found that while these consumers are well-educated on green topics, they are also confused about green products and daunted by their inability to make a difference through the products they buy.

The survey of 13-29-year-olds was designed to look at how Millennials perceive the green movement and brands' attempts to be green. The research also uncovered a not surprising price sensitivity among the youngest Millennials (those 13-17). While 76 percent of respondents ages 13-29 feel it's very important or important for brands to participate in the green movement, 71 percent of Millennial teens surveyed say if they had to choose between a less-expensive product or one that "gave back" to the environment, they would pick the cheaper one.

No matter their age, most of the Millennials surveyed expressed confusion over the higher cost of green products. Other barriers to buying green include products that require too much effort to use, are too time-consuming, not convenient, confusing or hard to understand. Family members who are not involved in, supportive of or knowledgeable about living green also cause problems.

The top words/feelings that Millennials associate with the green movement are: responsible, smart, cool, reality, refreshing, happy, trendy, new. Other terms include: fear, time-consuming, skeptical, annoying.

Additional findings from the survey, as taken from the company's press materials, include:

- 74 percent of Millennials believe they can make a difference in helping the planet, but the number decreases significantly among the 13-17-year-olds, only 48 percent of whom feel they can make a difference because the problems are too huge for them to move the needle.
- In terms of contributing most to living green, 87 percent of Millennials recycle; 84 percent turn off lights when not in use; 80 percent reduce water use; and 73 percent use energy-efficient light bulbs.
- The top three biggest hurdles this generation faces when embracing the green movement are cost (41 percent), proof that they're making a difference (24 percent) and ease of use (12 percent).
- The segment of Millennials with the highest planned participation rate in an Earth Day event was 18-21-year-olds (65 percent).
- 53 percent of Millennials state that they know a lot about the green movement but are "always willing to learn more."
- 54 percent of Millennials state that they care about the environment and are interested to get more involved.
- 37 percent of Millennials want to be more green but just don't know how to do it.
- 79 percent of Millennials say that the Internet educates them on environmental issues, while 85 percent of Millennials ages 13-17 state that school is their main source for eco-education. | Q

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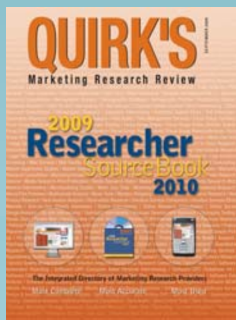
before you go...

online and offline

News about Quirk's and quirks.com

The SourceBook hits desks in September



Don't be alarmed next month when your Quirk's delivery is five times as thick! September brings the arrival of our annual Researcher SourceBook, the most comprehensive directory of marketing research companies around the world, listing over 7,000 locations - all searchable by name, geographic location, industry, specialties and more. The SourceBook is also available online at quirks.com/directory. We will return to our regularly-scheduled programming in October!

Higher education = higher researcher salaries?

The first-annual Quirk's salary survey suggests that the answer is a resounding yes! The average yearly salary difference between a market research professional with a Bachelor's degree and a Master's degree is nearly $33,000 (see table on p. 46). Others choose to continue their education and training by seeking certification from RIVA, Burke Institute, PRC, Principles in Marketing Research, etc. So what do you think? Have you found these programs valuable? Which ones do you recommend? Weigh in on the Quirk's forum at http://tinyurl.com/ResearchTraining.

New and improved article search features

See something you like and want to find more of the same? Quirk's has updated its online article display pages to make it even easier for readers to drill down to the industry- and specialty-specific articles that interest them most. Now the article search engine includes quick links at the top of article pages that link to all articles by the author(s) and all articles related to the individual industries and specialties tagged.

cover-to-cover

Facts, figures and insights from this month's issue

> "I like it when people call me by my name. Not like others that just say 'you.' I liked taking this survey - it felt like someone was there talking to me." *(p. 22)*

> Negative assumptions about mobile research have a sense of déjà vu and remind us of some of the caveats that were raised in the early days of online research - most of which, as evidenced by its widespread global revenues, have largely been overcome. *(p. 28)*

> Satisfaction scores without a valid, competitive context provide ambiguous guidance to decision makers at best and completely wrong guidance at worst. Markets are based upon competition. Why, then, shouldn't satisfaction be, too? *(p. 51)*

> At a time of growing demand for accountability, consumers are rewarding brands that align with their values, punishing those that don't and spreading the word with their family, friends and peers. Seventy-one percent of consumers agree that they avoid purchasing from companies whose practices they disagree with. *(p. 58)*

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To register, e-mail your complete contact information to: contest@quirks.com. Please include "RIVA Contest" in the subject line. Deadline to enter is September 1, 2009. The winner will be selected at random and announced in the October issue of *Quirk's*.

Congratulations to June's winner, Kelvin Chan of Pacific Blue Cross BC Life, Burnaby, B.C.