QUIRK'S

Marketing Research Review

AUGUST 2010

Social media research

> How do you analyze user-generated content?

> The three trade-offs of social media research

> Sampling and weighting social media data

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in case you missed it...

news and notes on marketing and research

Social Mavens – profiling social-networking Boomers

Baby Boomers and social networking. It's hard to tell if the hype around the pairing is anything more than just that, but research from San Francisco research company Continuum Crew suggests that the social networking-savvy Boomer - the unicorn of all things Web 2.0 - exists and can be reached. To be fair, 47 percent of older Boomers and 45 percent of younger Boomers are still not participating in any form of social media (with older Boomers behaving more like seniors/the silent generation and younger Boomers behaving more like Generation X), but the number of Boomers who are open to social media - and therefore reachable - is still in the 35-40-million range, according to a May 31, 2010, article in MediaPost written by Lori Bitter, president of Continuum Crew.

While social media isn't catching on with Boomers at the lightning-fast pace it did with their younger counterparts, the time Boomers spend online has grown 62 percent in the past three years while they reported actually spending less time volunteering, reading magazines, reading newspapers, reading for pleasure, exercising, listening to the radio, spending time with a spouse and watching TV. Clearly, Boomer leisure activity is shifting toward online activities, but marketers have struggled to solidify the relationship between Boomers and social media.

To help companies engage the Boomer who is online and in social networks, Continuum Crew identified a segment of users called Social Mavens: Boomers who are connected, exploring and expanding networks daily. A marketer's in with the Boomer generation lies with these Social Mavens who have significantly more frequent contact with individuals across all types of groups within their social sphere. This includes family members; political organizations; hobby or interest groups; religious organizations; social groups; neighbors; co-workers and former co-workers; and business contacts.

The Social Maven is most likely to be a younger Boomer (aged 45-54) and equally male and female, which is a surprise to many who think of women as the voracious social media consumers. Mavens are huge consumers of all types of media and also use more traditional media than the other segments, indicating a greater need for integration of online and offline engagement for companies who want to reach this segment.

Bland just won't do – stronger flavors rev up Americans' taste buds

Who wants jalapeno when you can have habanero? Recent flavor extensions to some American classics have shown that Americans' palates are evolving to accommodate - and demand - spicier and more intense flavors. And food and beverage companies are turning to consumer taste tests as well as their labs to ensure that their new products and line extensions are aligned with adrenaline-chasing taste buds, according to Miriam Gottfried's May 26, 2010, article, "A Taste for Hotter, Mintier, Fruitier: The Increased Craving for Intense Flavors Suggests That the American Palate is Changing," in *The Wall Street Journal*.

Most companies care about getting it right. When Dr Pepper Snapple developed its Dr Pepper Cherry soda, it tested 30 different cherry profiles with consumers, who judged the flavors on a nine-point scale and issued JAR ("just about right") scores. Dr Pepper Snapple also added fruit punch and mango flavors to its line of Venom energy drinks, and Wrigley rolled out its Orbit gum in tropical flavors like Maui melon mint and mango surf to cater to this fruity trend. However, as people crave intensity in flavor, some traditionalists wonder if diners will become desensitized to natural flavors. Regular mangoes may taste bland when eaten next to mango-flavored gum or a mango energy drink.

The current flavor boom may seem like a major departure from the mashed potatoes, chicken fingers, macaroni and cheese and other unadventurous fare that have long been the mainstays of American cuisine, but the flavor profiles now on U.S. shelves are bolder than those of the rest of the world. For example, Wrigley gum is actually sweeter and more minty in the U.S. than it is in China.

Intense flavor is being injected into meals prepared at home as well. Americans now keep an average of 40 different spices on-hand at home - a figure that has grown roughly twice as fast in the past two decades as it did in the previous 30 years. McCormick now counts sea-salt, smoked paprika, roasted garlic and dried lemongrass among the flavors in its typical grocery-store offerings. Asian and Caribbean spices, blends and marinades have been the focus of recent rollouts, and the company is predicting strong Indian spices will become more popular within the next five years.

Why aren't teens more excited about driving?

A car just isn't what it used to be. Or rather, a car doesn't mean what it used to mean - at least not for teens. Despite the sunroofs and Bluetooths and Bose systems and on-board navigation of 21st-century automobiles, Generation Yers aren't revving their engines waiting to turn 16 and get their first taste of freedom and adulthood, according to a June 7, 2010, article in *Automotive News* titled, "Kids on cars: Who cares?"

Fewer teens and young adults are driving, and those who are driving are doing less of it. In 1978, nearly half of U.S. 16-year-olds and three-quarters of 17-year-olds had driver's licenses, according to the Department of Transportation. By 2008, only 31 percent of 16-year-olds and 49 percent of 17-year-olds had licenses. The downward trend also holds true for 18- and 19-year-olds, as well and those in their 20s. Additionally, the share of miles driven by Americans ages 21-30 fell to 13.7 percent in 2009 from 18.3 percent in 2001 and from 20.8 percent in 1995, according to the Federal Highway Administration.

The real question is why more teens and young adults are content to wait out their licenses or perhaps not drive at all. Certainly the cost of buying, insuring and maintaining a car - not to mention fueling it, which costs as much as a gallon of gas did when Boomers were 16 years old - are deterrents, but there may be something bigger in play.

"I don't think the car symbolizes freedom to Generation Y to the extent it did Baby Boomers or, to a lesser extent, Generation Xers," said Sheryl Connelly, cultural trends tracker for Ford Motor Co. For Boomers, a car meant staying connected with the youth subculture, but these days the Internet and smartphones do the cultural connecting.

Another explanation could be the worker-bee mentality of a tight economy - and a long commute. When time is a limited resource, some would-be drivers might need the time spent commuting on a train to work, which is something that can't be done when driving a car.

Green advocacy, green adoption vary in definition and demographics

When it comes to green living, the youngest and oldest consumers are advocacy-oriented, while Generation X and Generation Y moms are more likely to take action and adopt green habits within their households, according to a study from J.D. Power Tribe Intelligence, a division of J.D. Power and Associates, a Westlake Village, Calif., research company.

J.D. Power Tribe Intelligence examined unsolicited consumer mentions to provide perspective on the online discussions of consumers in five demographic groups: teens, early careerists, Generation Y moms, Generation X moms and Boomers. Teens, early careerists and Boomers primarily take an advocacy approach to living green lifestyles through educating themselves about environmental issues and legislation and supporting causes ranging from climate change to air quality and conservation. They display fervor in advocating for green legislation and policy but often stop short of adopting green habits.

While these groups have this advocacy approach in common, their motivations for taking the stance differ. Teens and early careerists embrace the green cause as a method of establishing their identities and independence. Among Boomers, for whom rallying behind causes that support the greater good is already part of their collective identity, supporting green causes provides an opportunity to share their point of view and their experiences for creating change.

In contrast, Generation X and Generation Y moms take a functional approach to green living by applying green behaviors within their households. For Generation X moms, being green is motivated by a desire to be less wasteful and more frugal in their spending. In applying green behaviors such as gardening, composting and recycling, they have found that living a green lifestyle brings the benefit of saving money. While buying products that are perceived as green is not a primary goal for Generation X moms, they are willing to do so as long as the products fit within their budgets.

Generation Y moms take a do-it-yourself approach to applying green behaviors by developing their own cleaning products and baby food in an effort to provide pure, quality products for themselves and their families. They actively avoid potentially-toxic cleaning products and support brands that provide greener alternatives. For many Generation Y moms, being thrifty can be an added bonus to going green.

Green topics that are discussed online most frequently by these five demographic segments follow similar divisions. For Boomers, early careerists and teens, climate change is most commonly discussed. For Generation X moms and Generation Y moms, recycling is the most frequently discussed green topic of conversation. For more information visit www.jdpower.com.

Small businesses believe they will lead the U.S. out of recession

Small business owners are eager to lead the charge out of the country's protracted recession - with almost three-quarters saying they will be the driving force behind the U.S. economic recovery in 2010, according to Signs of the Times, a report from FedEx Office, a Dallas division of FedEx Corp., Memphis, Tenn. In fact, 51 percent of the small business owners polled say their businesses have already or will fully recover by the end of this year.

This optimism is a marked improvement over the survey's findings last year, when 54 percent of respondents indicated they were very concerned about the economy's impact on their business. Further evidence of this brighter outlook is that 18 percent of small businesses are considering an increased budget for staffing and human resources activities in 2010, up from just 9 percent last year.

Small businesses also are planning to put their trust in the power of marketing to help them restore business to pre-recession levels. About 42 percent of those polled are considering increasing spending on marketing and advertising initiatives in 2010, and 30 percent say they may increase spending on sales initiatives - both actions specifically aimed at boosting customer traffic and revenues.

The results further underscore small business owners' firm belief in the value of traditional and online marketing and advertising. In 2008, before the recession was fully felt throughout the marketplace, 41 percent of those polled were considering increasing spending on marketing and advertising initiatives. In 2009, with the recession in full-swing, even more small business owners (44 percent) reported considering a budget increase in that same area. This year's

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names of note

InsightExpress, a Stamford, Conn., research company, has hired **Cary Nadel** as senior director, custom marketing research.

Western Wats, an Orem, Utah, research company, has appointed **Bob Fawson** as vice president, online services.

The Research Partnership, London, has hired **Philippe Pouliot** as associate director. Pouliot will be based in Philadelphia. **Kah Huey Loh** has also joined the company's Singapore office as research director.


Pouliot


Loh

Moh Yin Chang has joined Omaha, Neb., research company *The MSR Group* as senior methodologist.


Chang


McCrary

Stockholm, Sweden, research software company *Cint* has named **Michael McCrary** managing director, Cint USA, sales and operations; and **Terence McCarron** senior vice president, sales.

Smarty Pants, a Johnson City, Tenn., research company, has hired **Nicku Bastani** as qualitative brainiac. Additionally, **Elizabeth Berman** has been named qualitative research prodigy. Berman will be based in Los Angeles.

Norm Galvin has been promoted to executive vice president of *InsightsNow Inc.,* a Corvallis, Ore., research company.

Ipsos North America, a New York research company, has named **Mark Campbell** CFO, U.S. financial operations.

Tracey Holupka has been promoted to marketing research manager of *Carfax Inc.*, Centreville, Va.

Gerhard Hausruckinger has been appointed to the management board of *GfK SE,* a Nuremberg, Germany, research company, and will assume responsibility for the Retail and Technology sector beginning January 1, 2011. His appointment follows the departure of **Gérard Hermet**.

The Marketing Research Association, Glastonbury, Conn., has appointed **David W. Almy** as CEO.


Almy


Martin

Jessica Martin has joined Des Moines, Iowa, research company *Quester* as a research assistant in its Ankeny, Iowa, office.

London research company *BrainJuicer Group PLC* has appointed **Han Zantingh** as managing director, China. Zantingh will be based in Shanghai.

Bellomy Research Inc., Winston-Salem, N.C., has hired **Rita Kenny** as senior research manager.

SurveyHealthCare, a New York research company, has named **Heather Stockhoff** senior developer.

The Modellers LLC, a Salt Lake City research company, has named **J. Mark Wirthlin** president; **Christopher G. Diener** COO; and **Cindy R. Ford** executive vice president.


Ford


Sampson

ICM Research, London, has named **Justin Sampson** chairman.

The New York chapter of the *American Association for Public Opinion Research*, Deerfield, Ill., has appointed **Sandra Bauman**, president of *Bauman Research and Consulting LLC*, Glen Rock, N.J., president-elect for 2010-2011.

M/A/R/C Research, Irving, Texas, has hired **John Cheneler** as senior vice president, medical services; and **Clay Dethloff** as senior vice president, qualitative services.

Ipsos Health, a New York research company, has appointed **Robert Ramirez** vice president, partnership development.

TaeHoon Kim has been promoted to lead the health care division of *Synovate Korea*, a Seoul, South Korea, research company.

Millward Brown, a Naperville, Ill., research company, has named

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product and service update

SymphonyIRI adds neuromeasurement to its in-market testing

Chicago research company SymphonyIRI Group has integrated its in-market testing service BehaviorScan with the neuromeasurement headsets from San Francisco research company EmSense, with the goal of quantifying shoppers' emotional and cognitive responses to new products and advertising campaigns.

The EmSense neuromeasurement headset will be used in the BehaviorScan test markets (Eau Claire, Wis.; Grand Junction, Colo.; Pittsfield, Mass.; and Cedar Rapids, Iowa) and is intended to provide consumer packaged goods marketers with another layer of consumer and shopper insights.

The headset, shaped like a thin, plastic headband, reads brain waves and monitors the breathing, heart rate, blinking, head movement and skin temperature of consumers to measure their emotional and cognitive responses to ads, new products and in-store conditions. For more information visit www.symphonyIRI.com.

Ipsos OTX MediaCT debuts two new services

The Worldwide Motion Picture Group at Ipsos OTX MediaCT, a Los Angeles research company, has launched its script evaluation division, designed to assess the potential viability of films at the script stage. The division will evaluate a script's potential for success by implementing a multistage review and analysis, including evaluation, playability, marketability and quantitative validation. For more information visit www.ipsos-na.com/media.

Additionally, Ipsos OTX MediaCT has formed an alliance with Future US, a South San Francisco media company, to form a new research destination, GamePlan Stats, on GamesRadar.com. The site (www.gamesradar.com/gameplanstats) aims to offer marketers and consumers insight into the purchasing behavior of gamers and their game-play habits across the U.S., with additional commentary from Ipsos OTX analysts and GamesRadar.com editors. Each month, video game industry professionals and consumers can visit the GamePlan Stats Web site to obtain free data, including the top 25 upcoming and recently-released titles. GamePlan Stats data will also provide regular updates of select GamePlan Core data. The data will come from Ipsos OTX MediaCT's GamePlan Insights weekly syndicated consumer tracking study. For more information visit www.gameplaninsights.com.

Joint venture created to help harness social media

New York researcher The Nielsen Company and New York business consulting firm McKinsey & Company have launched NM Incite, a joint venture created to help companies use social media intelligence to improve business performance. NM Incite builds upon the social media and online brand metrics, consumer insights and market intelligence of Nielsen BuzzMetrics. With the joint venture, BuzzMetrics will become wholly part of NM Incite. The initial areas of focus are measuring and improving marketing effectiveness, product launch optimization and customer service experience. For more information visit www.nmincite.com.

New tool available for conducting research via BlackBerry

Cloud Mobile Forms, a U.S. technology company, has made eSurvey, an online and mobile survey tool for researchers, available for BlackBerry smartphones at BlackBerry's App World. The eSurvey app aims to allow a BlackBerry smartphone to act as a forms manager and a multimedia data collection device for gathering statistical data, issuing incident reports, performing market research or other on-site activities that require a mobile form. Cloud Mobile Forms has released a fully-functional, non-trial free version that will permit up to five questions and allow a company's mobile workforce to gather information; take pictures; record voice notes; grab the actual time, date and location of an activity; scan a barcode; and analyze the results. For more information visit www.cloudmobileforms.com.

Research Now to offer panel-based online ad tracking service

Research Now, London, has launched Online Ad Tracking, a service designed to work in tandem with the company's online panels to monitor the success of online ad campaigns; assess brand awareness; and measure ad effectiveness. The tool is intended to identify panel members who were exposed to an online ad campaign, as well as capture information about the campaign, the Web sites where the ad appeared and the time and date that it appeared. Panelists who have been exposed to the online ad will receive targeted invites to follow-up surveys.

Additionally, Online Ad Tracking clients will have access to the profiled sociodemographic information that Research Now provides from its panelists. Clients can also compare the results among panelists who were exposed to the ad along with panelists who were not exposed. For more information visit www.researchnow.co.uk.

AdEffx Smart Control methodology sets out to measure digital ad effectiveness

Reston, Va., research company comScore Inc. has introduced AdEffx Smart Control, a methodological approach for measuring digital advertising effectiveness. The Smart Control methodology, based on marketing mix modeling techniques, aims to improve measurement of emerging segments of the digital advertising landscape, including home page takeovers, integrated placements and specific audience buys.

Smart Control works by looking at the change in consumer response (either attitudinal or behavioral) by varying frequency of advertising exposure using a Bayesian regression model, from which

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research industry news

News notes

The MRA Research Industry Index (RII) jumped from 91 at the close of 2009 to 98 during first-quarter 2010 - the highest index score since the fourth quarter of 2007. The RII, compiled by the **Marketing Research Association** (MRA), Glastonbury, Conn., is a composite score based on reported changes in business metrics and changes in business owners' perceptions of the health of their business.

Separately, the MRA announced that the Colorado Pharmaceutical Transparency Act, signed into law by Governor Bill Ritter, includes an amendment proposed by the MRA excluding incentive payments for health care practitioners who participate in marketing research projects. The MRA was also successful in defeating similar bills lacking such an amendment in Connecticut, Hawaii, Minnesota and Mississippi.

On June 17, 2010, **The Food and Drug Administration** (FDA), Rockville, M.D., wrote a letter to Richmond, Va., cigarette manufacturer **Philip Morris** demanding that it surrender all the market research it has conducted or possesses on how consumers react to the firm's planned changes to Marlboro Lights packaging.

In an effort to evade a new FDA ban on promoting cigarettes as light, mild, or low-tar, Philip Morris has attached onserts to its Marlboro Lights packs stating, "Your Marlboro Lights pack is changing. But your cigarette stays the same. In the future, ask for Marlboro in the gold pack."

In addition to the onserts, Philip Morris and other tobacco companies are using lighter-colored packaging for light brands and have switched to terms such as gold and silver to replace light and ultra-light.

The FDA has requested all documents referring or relating to any onsert or other written material concerning the marketing or sale of Marlboro in the gold pack or any change in the packaging of Marlboro Lights, including all materials about market strategies, themes, concepts, creative recommendations and dissemination strategies and all documents pertaining to marketing research - qualitative, empirical or otherwise - concerning Marlboro in the gold pack. Such documents include, but are not limited to, any documents relating to consumers' concerns, beliefs, perceptions, understandings, thoughts or impressions about the marketing or sale of Marlboro in the gold pack; the correlation between the color or word gold and taste; the yields of tar, nicotine or other tobacco constituents; or health risk and product harm.

In June 2010, Denver research firm **TAi Companies** announced that it has suspended operations in all locations. For TAi business-related inquiries contact Hal Meier at 201-923-5807.

San Francisco research company **Quantcast** received accreditation from the **Media Rating Council** (MRC), New York, for its syndicated online traffic measurement service Quantified Publisher. MRC accreditation certifies that the Quantcast Quantified Publisher program and its supporting processes adhere to industry standards.

Spanish Broadcasting System Inc. (SBS), Coconut Grove, Fla., and Columbia, Md., research company **Arbitron Inc.** have entered into a settlement agreement regarding SBS's concerns about the impact of the Portable People Meter (PPM) service on minority radio broadcasters. Under the agreement, SBS will resume encoding its broadcast signals for all of its markets that use the PPM radio ratings service, and SBS has extended its contract with Arbitron for the use of PPM ratings in said markets.

Toronto research company **Youthography** closed its doors for business in May 2010 following the demise of Y Syndicate, its sister advertising business.

2010 marks 15 years in business for Cologne, Germany, research company **Skopos**.

QSR International, a Doncaster, Australia, research company, will award six grants to academics teaching qualitative research methods in universities in the U.S., Canada and Asia-Pacific. Grants can be put toward NVivo 8 or NVivo 9 software licenses; NVivo training workbooks; and training and consulting services from QSR. For more information or to apply for a grant visit www.qsrinternational.com/news_whats-new_detail.aspx?view=229.

Acquisitions/transactions

New York news Web site **The Huffington Post** has acquired New York technology startup **Adaptive Semantics** in a cash deal. Adaptive Semantics will provide JuLiA, a semantic analysis engine already used by The Huffington Post, to help moderate the 100,000 comments published on the blog every day. This is the first acquisition for The Huffington Post; terms of the transaction were not disclosed.

FactSet Research Systems Inc., Norwalk, Conn., has acquired Quincy, Mass., research company **Market Metrics Inc.**

Chicago consulting company **Accenture** has agreed to acquire assets from **CadenceQuest Inc.**, an Arlington, Va., customer insights company. The proposed acquisition of the retail sector software assets of CadenceQuest would expand the digital, marketing analytics, retail marketing and merchandis-

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We're on a mission.
Our goal at Western Wats is simple—to be the world's most trusted source of survey research services. Over our 23 year history, the methods have changed, but one thing remains the same: our commitment to consistently provide objective insights to researchers through reliable data collection. To all our client partners who have traveled the trail with us, thank you for your continued trust and support. We can't wait to show you what we have in store for the journey ahead.
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By David Haynes

Are Internet access panels a lemon market?

I believe that the Internet access panel space is what economists call a lemon market. Lemon markets are unhealthy and require collective action to improve their vitality. By adopting independent quality certification, the market research industry can address many of the common frustrations in the Internet data collection space.

Academician George Akerlof earned the Nobel Prize in Economic Sciences by explaining lemon markets in his paper, "The Market for Lemons: Quality Uncertainty and the Market Mechanism." Akerlof wrote that lemon markets tend to develop when a number of conditions are met:

- the quality of products or services is variable;
- sellers find it difficult to objectively demonstrate quality prior to the sale;
- sellers have an incentive to overstate the quality of their goods;
- buyers find it hard to evaluate the quality of the offer prior to purchase.

Today, all of these conditions are met in the Internet access panel space. This is a cause for concern because lemon markets disadvantage buyers by driving high-quality providers out of the market and incentivizing current providers to offer lower-quality products.

Editor's note: David Haynes is CEO of Western Wats, an Orem, Utah research firm. He can be reached at 801-379-4002 or at dhaynes@westernwats.com. To view this article online, enter article ID 20100801 at quirks.com/articles.

Various claims

Recently, I was discussing the Internet panel space with a prominent buyer of survey research services. She was having a difficult time sorting through the various claims of competing firms. "They all promise quality," she declared, "but the only element I can objectively measure is price. It's hard to pay a premium for quality when you are not sure you will get it." I have heard other vexed researchers echo her frustrations.

Because buyers have a difficult time determining the quality of the goods ex ante, they are compelled to guess - and the best estimate given limited information is average. Therefore, the buyer will pay no more than the average market price. The average market price

snapshot

The author argues for a way to allow users of access panel research services to pre-judge the quality of their suppliers' products and eliminate the uncertainty that is harming both buyers and vendors.

hurts high-quality providers because they are denied a rightful price premium. The average market price helps low-quality providers because they receive unfairly rich margins. This dynamic drives high-quality providers out of the market or toward lower-quality offerings. How many times have I heard the lament, "Companies talk about quality but make purchase decisions on price"? A lemon market explains this dynamic in a rational framework. It's not that buyers are hypocrites; they are just exercising rational judgment in a less-than-perfect market.

Sellers of lower-quality goods are advantaged in a lemon market. They receive the average market price for below-average products. This aids in low-quality market entry and rewards provider misrepresentation. I believe that a large part of the quality problem in online access panels is due to the effect of rewarding market participants for lower-than-average quality products.

Within the limitations of science, we have known what is required to provide reasonable quality Internet respondents for years, yet too many providers choose different practices for short-term gain. It is expensive to actively manage a large panel inventory, so few companies do it. But a quick review of the available marketing literature would not lead a buyer to this conclusion. Instead, he or she is led to believe that there are many large global panels that are carefully managed for data quality or that actively managed panel inventory is no longer necessary.

Objectively demonstrate

Improving the market for online access panels can be done by invalidating one of the conditions necessary for a lemon market to exist, namely the one in which sellers find it difficult to objectively demonstrate quality before purchase. In a healthy market, reputation can signal a quality offering. The difficulty in our space is that many providers' operating practices change over time. Quality yesterday does not guarantee quality today.

Objective, third-party quality validation can augment reputation and enable sellers to credibly demonstrate quality before the sale. Third-party quality validation must provide relevant, unbiased, standardized metrics comparable across sample sources. With this in mind, I propose the following conditions that a validation process should satisfy to enable buyers to make more quality discriminating decisions:

1. Applies to all online sampling frames.
2. Directly measures variables salient to the purchase decision (these may include, but are not limited to, consistency of data over time, comparisons to external benchmarks, and respondent thoughtfulness and legitimacy).
3. Process and participation are fully transparent.
4. Independence - the validating entity must have no incentive that would prevent it from assigning failing marks to low-quality sample sources.

Compelling start

There are a number of laudable efforts underway today. Although in early stages, quality programs such as those from MarketTools; Imperium; Mktg, Inc.; and a number of industry organizations provide a compelling start. I urge all market research participants to offer their full support. Through a rigorous certification process, sellers can objectively and consistently display quality, lifting the health of the survey research market and helping it shed the "lemon" tag. | Q

> software review

By Tim Macer

Q data analysis software

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@meaning.uk.com. To view this article online, enter article ID 20100802 at quirks.com/articles.

Q is a new data analysis program from Australia-based Numbers International that is designed to allow researchers to reveal hidden depths in their survey data using the power of statistical testing and modeling but without expecting researchers to become advanced statisticians. It's perhaps fitting for software from Down Under that this tool can turn the process of analyzing market research data on its head. If it borrows from any school of data analysis, it is probably from the SPSS Base statistics approach, but in a way that is much more market research-savvy than the more general-purpose SPSS.

Q deals intelligently with every kind of survey question - single-coded, multi-coded, numeric value, even grids - in a consistent and even-handed way. Unlike the majority of conventional market research tabulation tools, it is not afraid of letting researchers - the primary audience for this software - get eyeball-close to the data: All the case data is only a mouse click away, on a dedicated data tab.

Q is offered as a desktop tool that works under Windows. You start by opening your Q file (with the file type ".Q", which is the study's database containing both case data and survey metadata) just as you would open a Word document or PowerPoint deck. The expectation is that your data provider or data processing department would set this up for you and even create some reports ready to work on. If you want to do it yourself, you can also create your own Q database by importing directly from SPSS SAV or SPS files or from Triple-S files. These will load in all the variables from your study and give them the right designations (single-coded, numeric, etc.), which are important to ensure Q knows the most appropriate models or tests to apply to each question. CSV import is also there as a fallback, though to get the best from the program you will then need to spend some time setting up appropriate question and category labels and ensuring the right question types are set.

Q by Numbers International (www.q-researchsoftware.com)

Pros
- Easy graphical way to recode variables, merge categories and create filters
- Makes applying sig tests and statistical models to research data very easy
- Excellent range of use guides, help and online tutorials

Cons
- Output styling a little lackluster
- Limited support for tracking studies
- U.S. support currently comes from Australia

Cost
- Single-user annual license of Q Professional is $1,499. Q Basic with a reduced feature set is $849 annually. Multi-user and volume discounts available.

Easy to learn and use

This software is very easy to learn and to use, though it is not necessarily intuitive at first sight - probably because there's some unlearning to do for most experienced researchers. To make the point, Numbers provides not only a quick-start guide to take you through basic tables to choice modeling and latent class analysis in 60 pages, but also an instant-start guide which distills the basics into a single sheet. There is also integrated help and online training with show-me features that take over the software, select the right menu options and then undo it again, ready for you to do the work yourself.

What really differentiates Q from other survey data analysis tools is that it offers the researcher a blended approach to data analysis, combining straight crosstabs for primary reporting with advanced multivariate approaches to reveal hidden trends and connections in the data. So often, these connections remain undetected in most survey datasets simply because the researcher lacks either the tools or the time and budget to dig any deeper. Q can help move the task of analysis from superficial reporting of the numbers to telling the client something he or she really hadn't realized - based on evidence and backed up with confidence scores.

For the more involved operations, such as multivariate mapping or latent class analysis, you always start from basic tables and analysis. It help keeps you grounded, letting you approach more advanced and possibly less familiar analytical techniques in a stepwise process, building on what you have already seen and verified.

One of the design principles Numbers applied to Q was to put users in front of the actual numbers as early as possible in the process. You always start in table view, looking at some of the data, but this view is highly dynamic and many of the options that you find tucked away in menus, pick-lists and property sheets in other analysis tools are achieved simply and elegantly by dragging and dropping. For example, just clicking, dragging and dropping will let you merge categories; create nets; and rename, reorder or even remove categories. Most functions or options are no more than a single context-sensitive click away.

Another difference is that the program works out the best way to analyze the questions you have selected - you use the same table option whether your question is numeric, categorical or grid. There are a lot of different options that help Q understand the kind of data it is dealing with, and from this it will also select the most appropriate significance tests to apply to the question. It makes appropriate adjustments according to whether the data are weighted or not, and also takes into account the effect of applying multiple significance tests that can otherwise lead to false positives.

In the tables, arrows and color-coding show not only which values are statistically significant but highlight the direction of the difference. As you generate tables and other outputs, these appear in a tree on the left. You can keep them or discard them and you can also organize them into subfolders. From this, you can create a package of a subset of the tables or models you have created. This creates a small e-mailable file which others can then view by downloading the free Q Reader.

The Reader can provide a very simple and inexpensive route to distributing interactive tables to clients. Numbers limits the options in the Q Reader version but clients and co-workers can still slice and dice the data in different ways that are relevant to them but have no direct recourse to the raw data.

Another impressive feature is its handling of conjoint analysis. Q lets you roll up an entire multilevel choice model into a single composite question, which you can then cross-tabulate and filter with the same ease as a simple yes/no question. And with all of the built-in significance tests and other analytical techniques at your disposal, you can very quickly determine the real drivers in any choice-based model.

A little lackluster

Where the software is perhaps a little lackluster is in the quality and range of the options to finesse the outputs it provides. It makes little attempt to represent data graphically in histograms or pie charts. Charts are restricted to those associated with correspondence mapping or other such models. There is no integrated support for Excel or PowerPoint, either. If your point of reference is SPSS, then you may find its outputs a step up, but if you are coming to it from other market research data analysis tools, you may well be disappointed.

The full version of Q will also let you import and refresh your data, which provides some rudimentary support for trackers. However, the current version, although it contains very good support for time-series analysis, is poor at version control and reconciling differences in data formats between waves of the study. Perhaps surprisingly in these days of data integration, you can only have one study open at once, though Windows will let you have more than one instance of Q open.

Overall, these are relatively minor weaknesses in a highly-intelligent software product. They are largely indicative of a developer whose priorities lay in simplifying the most challenging problems, and in doing so allowing substance to triumph perhaps a little too much over style.

Gradual introduction

One company making extensive use of Q is Sweeney Research, also in Australia. Erik Heller is general manager of Sweeney's Sydney office and an experienced researcher with a background in advanced quantitative methods. He has overseen the gradual introduction of Q as an analysis tool for researchers to use on data collected largely in-house from a broad range of telephone, online and in-person surveys. "One of the advantages of Q is that it is very easy for someone who is not that involved in the data analysis to go into the data and run some additional cross-tabs," Heller says.

"There is a huge efficiency gain if someone works up a hypothesis when writing his report and does not have to stop what he is doing, run downstairs or write an e-mail to the data analyst. It may not sound like much, but it is really quite disruptive and therefore desirable to streamline this from the business perspective. That is not something that is especially novel to Q, but where Q differentiates itself from other tools like SPSS is the extent to which it is intuitive and easy for people to immerse themselves in the data."

Asked how long it might take a novice user to become familiar with the software, Heller says, "That really depends on the individual, but most people seem quite capable of using Q within a couple of hours: checking the data make sense, interrogating the tables and producing some additional basic tables."

However, as Heller points out, this is just the start for most users in understanding what Q is capable of. "The statistical abilities of this program are the biggest reason I've been driving this internally to get people to use it. What's really good about it is the sophistication of the tests and the foolproof way that they are applied. If you think about the purpose for which most of the traditional tests were originally designed, it is very different from the ways we analyze commercial research studies today.

"In a way, at the 95 percent confidence level, every twentieth test will be a false positive. And on a typical study, we run hundreds of these tests. Q uses testing approaches that aim to account for this and are therefore more appropriate for the huge number of tests that are done on a typical study. It means it is easy to cut across big data sets and see the important, statistically-significant effects. To do that in a software like SPSS is infinitely more cumbersome."

Heller had also used Q to analyze conjoint studies, both before and after the conjoint analysis module was added to Q, where an entire choice-based experiment is simply treated as a single composite question. "I've use it on one project, so far" he says. "It is brilliant in its simplicity. Most people are probably used to having a bit more control over the data and this way you are putting a bit more trust into the software. Clearly, the approach they have taken is that they want to make it as simple as possible. It is ideal for someone who does not have the time to get involved with all the statistics behind it. I think it is a great feature and one I will use a lot more going forward."

Another plus for Sweeney Research is the ability to export tables and charts in Q for clients to view in the free Q Reader. "For them to be able to look at the tables and merge categories without manipulating the original data is very beneficial and we find they are very keen to use it. It does not overload them because the free version has fewer options; it just allows them to check the little queries they might have. It is all about simplifying things. There is so much information out there these days and there is no shortage of data - the aim is to provide it in the most usable format you can." | Q

social media research

By Andrew Wilson

Does UGC make you say 'Ugh'?

When your consumers are talking online, here are some tips on how to listen

More people than ever actively participate in blogs, forums, product/service reviews, social media sites and other platforms for user-generated content (UGC). The opinions expressed in these venues are unsolicited, honest, candid and passionate and can be extremely thoughtful. The topics are varied and people discuss everything from what they did last night to the technical nuances and likes and dislikes of the latest gadget.

With the explosion of UGC, managers have begun to face the question, "Are you listening to UGC?", but how you listen will dictate what strategic decisions you can make with this new data source. The UGC ocean is vast, but having a lot of data does not automatically imply you can or should analyze these data quantitatively. UGC should be viewed as a series of unstructured conversations that, when used appropriately, can add depth to and expand your understanding of who your customers are and their experiences with your products and services.

Many quickly find the sheer volume of online conversations overwhelming and look for tools to help focus their efforts. One popular solution, dating back to the earliest days of UGC in the late '90s, is to "scrape" the Web and use text analytic tools to automate the analysis. How does scraping work? The researcher selects a number of search terms, much like a search engine, and then the tool crawls the Web in search of UGC relating to these search terms. All positive hits are then aggregated in a database. Next, a text analytic tool counts how frequently a product, feature, brand, etc., is mentioned and makes an attitudinal assessment (e.g., positive, neutral, negative) for each statement.

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snapshot

User-generated content is everywhere these days. But how do you make sense of the chatter? One successful approach outlined by the author is to analyze what's being said and use the findings as a springboard for more rigorous research.

This solution is relatively inexpensive and enables reports to be generated quickly. But there are some issues. While these tools make the task of "listening" easier by automating searches and distilling the endless search results into quantitative data, there are three inherent problems that people should be aware of when collecting and analyzing UGC quantitatively: representation, contextual confusion and online echo.

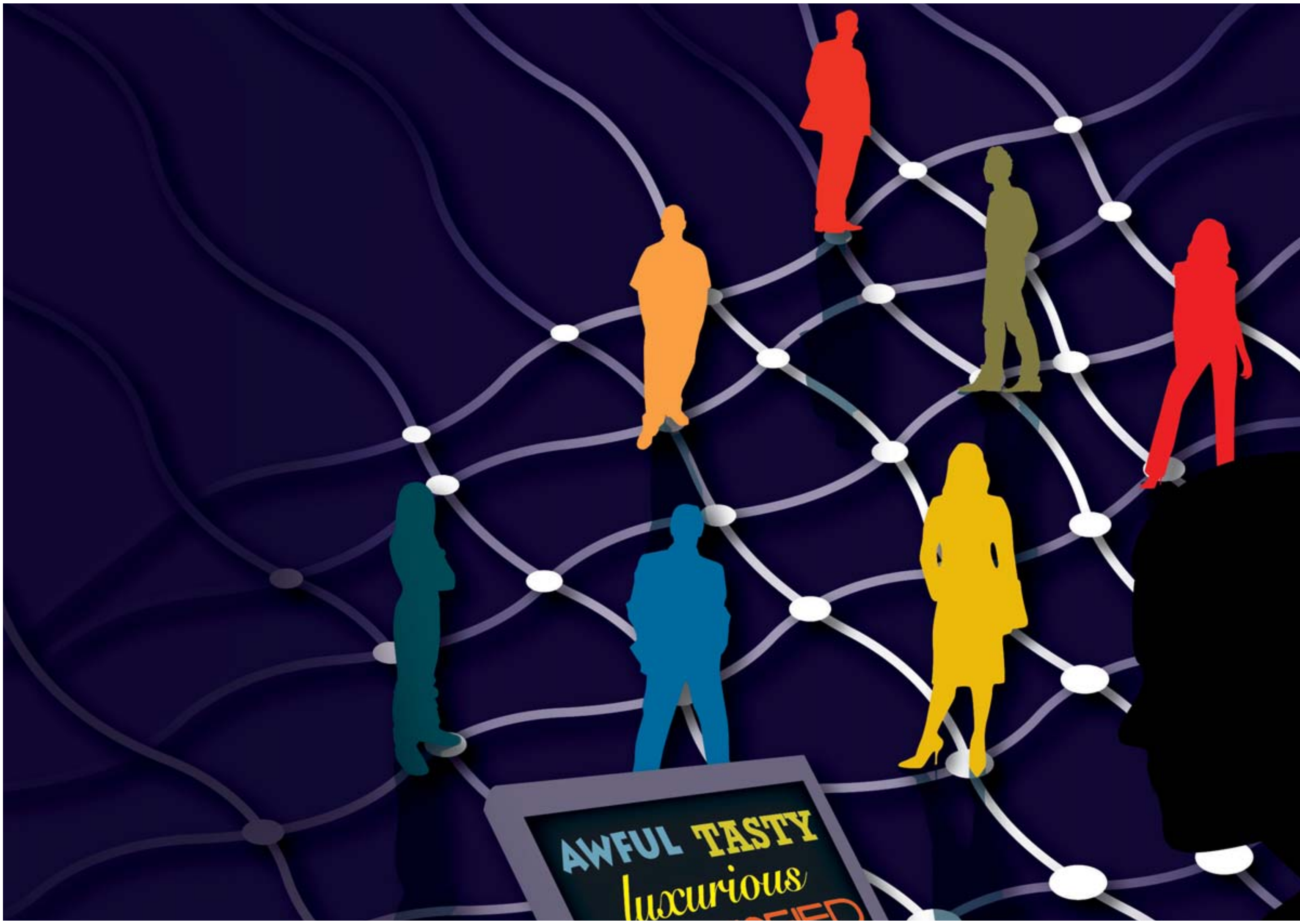
To demonstrate how these issues can be disruptive, consider the following fictional example. Imagine a manager at Toyota wants to use UGC to investigate whether consumers feel the product quality of Toyota's Scion is superior to a model offered by Mazda. Let's assume that after scraping the Internet, an automated program reports that 70 percent of all the UGC relating to both the Scion brand and its product quality is positive. Similarly, this same tool finds that only 50 percent of the comments relating to both the Mazda brand and its product quality are positive. The manager might initially conclude that consumers believe Scion has higher product quality than Mazda, but let's dig a little deeper into these numbers by asking a few simple questions about the data.

Representation

First and foremost, who is responsible for that 70 percent and 50 percent? Are those figures representative of all Scion and Mazda customers? If not, are they representative of the same subset of customers (e.g., auto enthusiasts, actual customers, potential customers, etc.)?

The Internet users responsible for user-generated content are not necessarily representative of the general public, a company's customer base or that of its competitors. Much of today's UGC is created by a relatively small minority. There is also a possibility that different types of customers are responsible for UGC for different companies (e.g., young auto enthusiasts may be primarily responsible for Scion's UGC while young professionals could be predominantly responsible for Mazda's). In 2009, Forrester Research found that while Internet penetration is approaching 80 percent, only 24 percent of adults would be considered creators - those who publish a blog, publish a Web page, upload videos, upload audio/music they created, write articles/stories and post them (Source: Forrester Research's 2009 Consumer Technographics Study).

For most UGC, the common thread is passion. People are driven to blog, post, review, tweet, etc., because they are passionate about



an activity or they experienced an abnormal or extreme experience that they'd like to share with the world. Without understanding who is responsible for the UGC behind the above figures, one should be cautious before concluding that consumers or even certain consumer segments perceive Scion's product quality to be superior to Mazda's.

Contextual confusion

What percentage of the results is truly relevant to Scion, Mazda and their product quality? What percentage of the results was misclassified as positive, neutral and negative? Are these percentages the same for Scion and Mazda?

Context is essential to understand meaning. It is also extremely difficult to automate since contextual clues are constantly evolving alongside language and are often very subtle (e.g., discerning Apple the company from apple the food). While text analytic and Web-scraping tools are improving in their ability to understand context, it is certain that any Web-scraped database still includes many irrelevant search results and excludes some relevant ones. You can also be sure that it has assigned improper attitudinal assessments to many of the phrases. Currently, human oversight and review of the data are the only ways to be sure your data are truly relevant to your search terms and that attitudinal assessments or other codes are correctly assigned.

Here are some examples that highlight the contextual confusion issue. Most of today's text analytics tools would classify the following statement as a negative comment about the Scion: "With the supercharger included on my Scion, it is one bad machine," not being able to recognize the slang use of the word bad to actually mean good. Similarly, most of the technology would classify the following statement as being positive for Scion: "I loved my Scion then I had to replace the transmission twice in the past two years."

Further complicating matters, much of a Web-scraped database will consist of forum posts and replies, which have complicated references that are easy for you and I to understand but extremely difficult for a computer program. For example, when visiting a Mazda enthusiasts' site you might encounter a post titled, "My suspension is amazing," where a user gushes about how great the suspension is on their Mazda 6, which is then followed by replies such as, "I agree, but my previous Mazdas had poor suspensions," "I'm not sure I agree with your earlier post, that car really has oversteering problems," "You're wrong, that system is horrible," "With the new upgrades it's much better than stock and now I love my car," etc. Imagine Mazda wants to use these scraped data to evaluate how consumers feel about the Mazda 6 and its suspension. You quickly get a sense of how language and context can confound an automated program that is determining relevance and providing an attitudinal assessment.

Online echo

Of the results, how many are duplicate thoughts from a single user? Is this equivalent for each brand?

Internet users creating UGC rarely limit themselves to a single outlet (e.g., forum, blog, Facebook, etc.). Thus, search results often contain a single person's thoughts expressed on multiple sites. Unless the wording used on each site is identical, the database cannot identify the person as the same user and remove these duplicates. Most UGC is anonymous. While there is technology that can scrape data and attribute results to a single user, the universe of user-identified UGC is dramatically smaller than the user-anonymous universe. Consequently a scraped data set is likely to be distorted by very vocal users expressing themselves multiple times in several different venues. Understanding the degree to which duplication dilutes your data can be a guessing game.

Consider the following hypothetical example. A customer has their transmission fail but the failure was not covered under warranty. They post about it on their blog and then again on an auto-enthusiast forum to vent some more. Later they discover that others have similar experiences and decide to tell their story to anyone who will listen, hoping to warn other consumers and/or warrant a response from the manufacturer. These events are not uncommon and, more importantly, disrupt quantitative analysis of UGC data.

These three issues - representation, contextual confusion and online echo - make quantitative analysis of UGC precarious. While some academics have used UGC quantitatively to successfully predict movie box-office success and stock prices in the short term, those applications have been unique and difficult to apply to other applications. This is not to say that quantitative analysis of UGC cannot be useful, but people should be aware of the data issues that exist and adjust their strategic decisions accordingly.

Sift through the mass

A more robust method for analyzing UGC is to use Web-scraping and text analytics tools to sift through the mass of UGC, but to then analyze the results qualitatively. UGC can be incredibly influential, but understanding what people are saying - instead of how many people are saying it - is where the real value lies.

Rather than beginning with UGC and letting it drive how you listen to customers, a better approach begins with identifying the important strategic issues your organization faces. Then determine whether collecting UGC will enhance your understanding of those issues. Are people even talking about your product or service category online? A quick search on Google, Omgili or Technorati can give you a sense of what's being discussed.

In deciding whether or not to analyze UGC, an organization should also consider if an important segment's thoughts are absent from the UGC universe. If they are, can others speak for this segment (e.g., products targeted toward the elderly)? If not, it may be necessary to supplement the Web-scraped UGC database with an additional form of exploratory research (one-on-one interviews, focus groups, etc.) or consider a different approach entirely.

Let's return to our earlier car

example to demonstrate how an organization could analyze UGC more effectively. Imagine that an automotive manufacturer wants to investigate what wants and needs customers have when purchasing a vehicle. Feeling confident it has not excluded important opinions or groups, the organization might scrape the Web, looking for UGC to understand how customers evaluate automobiles (e.g., how customers define product quality, what features they consider, current issues with vehicles today, issues in the buying process, etc.). This broad search would likely net far too much content for any one person or small group to read the entire database. So cleaning the database of irrelevant results should be the first step, which might involve removing any comments that are fewer than 10 words or comments about pricing and promotions, which tend to be abundant and irrelevant. There are other obvious topics that can be removed from the database but beyond that the task becomes subjective.

To give you a sense of just how much irrelevant data there could be in a scraped database, consider this actual example. During a recent experiment at our firm, we scraped the Web for UGC on mouth-care products and found that only 10 percent of the results were actually relevant to our topic.

Hit the mark

A word of caution, which may seem obvious: the more refined the search, the smaller the resulting database. While this makes sifting through content easier, it simultaneously increases the risk of removing key insights. Striking the right balance can be difficult, but you've hit the mark when the majority of the cleaned database is relevant and an analyst can actually read through the entire database. While this may take a while, they'll still be able to pull out lots of nuggets of useful information.

Next, using text analytics, an analyst can classify comments by features, issues, buying processes, etc. It is also useful to understand which features are frequently talked about together (i.e., co-occurrence) and many vendors offer tools that automate and graphically display these results for your UGC database.

Using text analytic tools this way and graphing the co-occurrence of topics helps organize the content so that you can learn faster and more effectively. Classifying the cleaned data makes it easier to see broad trends and understand issues more completely. As you continuously read through the database you'll discover new classifications and important issues you initially overlooked. The goal here is to develop a qualitative report similar to one you would receive after conducting one-on-one interviews, focus groups, ethnographies or other forms of qualitative research. This process will help you identify key issues, develop theories about customers' experiences and understand their wants and needs.

Given a structured database of UGC, it is tempting to try to reach conclusions about the features and issues that are most important based on volume and an attitudinal assessment, but this process should be reserved until later. Often what is top-of-mind may not be most important and, given the issues discussed earlier, there is potential for your analysis to be misleading.

To make judgments about what features and issues organizations should focus on or which ones are most important, a more rigorous quantitative research method would be the logical next step. This could involve asking a random sample of customers to go through an importance and performance rating exercise or possibly a conjoint exercise. These more rigorous quantitative methods will provide a much clearer picture about what to focus on and the organization can have much greater confidence in these results. With appropriate experimental design and sampling methodology, this approach ensures the results are representative and are not susceptible to the issues discussed earlier.

Extraordinarily influential

As online outlets (blogs, social networking, reviews, forums etc.) have exploded, customers have become more powerful in their ability to influence each other and the businesses they interact with. Even though UGC may not represent the broad views of the market, it can be extraordinarily influential, given its ability to reach others. Therefore understanding what is being talked about online and the implications of those discussions is crucial for many businesses. By understanding the limitations inherent in some of the UGC data collection and analysis techniques currently available, organizations can identify appropriate times to use these data and when to seek out more robust insights. | Q

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media research

By Jon Last and Christopher Whitely

Still in the hunt

Comcast's Versus channel turned to research to better understand a core audience segment

In 2009, Comcast's national sports cable network faced a challenge. It had rebranded and changed its name from Outdoor Life Network (OLN) to Versus in September 2006 to better communicate the network's core focus around competition, rather than just the outdoors. Yet it continued showing large blocks of outdoor content, which were housed under the Versus Country umbrella. While the perception was that Versus was moving away from its outdoor programming offerings, the number of hunting and fishing programming hours on Versus actually increased 6 percent from 2007 to 2008.

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However, endemic hunting/fishing advertisers began to perceive Versus Country as being "less pure" than competitors who maintained a 24-hour, seven-days-a-week schedule of outdoor programming. An examination a straight trending crosstab of syndicated data from 2006 to 2009 suggested that Versus viewers' participation in outdoor activities was going down. (There was not a question in the syndicated studies asking respondents directly if they viewed Versus' fishing and hunting programming.) At the same time, viewers of the competing Outdoor Channel did not display any decreases in hunting or fishing participation over the same time period.

snapshot

Following a rebranding of its Outdoor Life Network as Versus, which broadened its scope to include other sports, Comcast Networks conducted in-depth research to show advertisers that the channel's core audience of outdoorsmen was as strong as ever and receptive to ad messages outside of the hunting and fishing categories.

This was counterintuitive and gave rise to a series of questions. Were Versus viewers actually participating in outdoor activities less or was the decrease a function of the network's rebranding? That is, since the network was previously known as Outdoor Life, was the broader Versus brand diluting the true scope of outdoor programming on Versus?

There was no indication that viewers were becoming less engaged with the programming after the rebranding, as the audience to Versus Country's programs continued to grow. Over the 2006 to 2009 period, the Versus Country block saw an 11 percent increase in its average household audience and 26 percent growth in its key primetime programming block, according to Nielsen Media Research.

It is important for endemic advertisers to reach an audience that is passionate about and likely to participate frequently in the sport or sports that are the focus of the media outlet. By early 2009, with the sales and marketing teams facing scrutiny from advertisers who questioned the Versus Country audience's commitment to field sports, Comcast Networks sought to address these concerns through a custom research approach that would enable network executives and advertisers to better understand this audience and demonstrate the network's commitment to the vertical category.

The core question we sought to answer was the true level of Versus' audience participation in the endemic categories of hunting and fishing. Beyond that was a desire to provide additional details on the category-specific behaviors, attitudes and preferences of the field sports market. Proprietary research conducted by Comcast Networks and Sports and Leisure Research Group in 2009 was designed to provide an insight-driven platform to address these issues.

Unstable data

One of the great paradoxes of media research within narrow vertical niches like sports is that huge advertising decisions are often made on relatively unstable data. Having sat in the seats of media researcher and marketer, independent researcher and advertising client, the authors have seen a constant battle between the often elusive search for valid and projectable syndicated currency from which to make cross-media evaluations and management's desire to simplify conclusions about audience fit through succinct measurement metrics that put the advertiser's options on a level playing field. This situation is particularly acute in the sports media.

Figure 1: Respondent Self-Identified Spending Levels, Compared to Competitive Networks

	TOTAL	Viewers of Outdoor Programming on Versus	Network X	Network Y
Spent $200+ on Camping Equipment	26.2%	31.2%	27.6%	28.1%
Spent $200+ on Hunting Equipment	24.7%	32.7%	25.9%	28.6%
Spent $200+ on Fishing Equipment	26.0%	35.7%	29.7%	28.8%

Source: Comcast Networks Outdoor Sports Viewer Study conducted by Sports & Leisure Research Group, 2009

One of the challenges that today's sports media marketplace presents when attempting to tie together audience viewing profiles, advertising receptivity and purchasing behavior for smaller/niche sports is the multitude of research sources available. Each has its own limitations. The syndicated sources are constrained by issues that include recency, depth and questions regarding both sample appropriateness and survey question design. At the same time, custom research efforts are inhibited by scope, repeatability and cost issues, which have become more acute as research budgets have been compromised during the recent recession. Both potential solutions are also limited by information availability. Particularly in vertical niches like sports, there is often a limited amount of stable and projectable data, a lack of universal measurement across the category and across media, and varying levels of acceptance and research utilization within the respective endemic marketplaces.

In past work experience, one of the authors has observed frustration when syndicated currency failed to deliver a plausible sense of differentiation between various vertical media in the golf space. For example, from both a media seller and buyer's perspective, it was often problematic when syndicated data depicted vertical golf media audiences at virtual parity, despite the fact that the most universally accepted syndicated data source revealed that literally half of the aggregate audiences of the leading vertical golf media did not even play golf. How then could reasonable cross-media evaluations be made, when the currency data cast doubts on audience differentiation across media? How could media planners objectively utilize currency that raised such fundamental questions of accuracy? And how could media sellers confidently and rationally assert the value of their audiences when the very foundations that defined those audiences were in question?

These were some of the issues before us as we began working on the Versus project.

Identify the desired utility

Before embarking upon our specific methodological framework for Versus, the Sports and Leisure Research and Comcast project teams sought to identify the desired utility and application of the research. It was clear that a proprietary study would need to broadly define the Versus Country audience and the overall field sports enthusiast population.

We sought to identify key drivers of brand preference and satisfaction on both an aggregate and comparative basis. We built brand-blind question constructs that evaluated awareness and understanding of the strengths and weaknesses of specific programming content across the competitive set. Simultaneously we sought a more holistic understanding of the role of field sports within the overall lifestyles of the audience. Inquiries focused on spending and behavioral

Figure 2: Comparative Participation of Versus Hunting/Fishing Programming Viewers and Spending In Outdoor Activities

Versus Adult Male Hunting/Fishing Viewers	Sports and Leisure Research Group 2009 Study %	% Difference vs. Syndicated Study
Hunt 2-3 Times Per Month	8.5	+0.4
Fish 2-3 Times Per Month	22.1	+9.3
Spent $50+ on Fishing Equipment in Past 12 Months	79.9	+69.0
Spent $200+ on Camping Equipment in Past 12 Months	31.2	+25.4
Spent $100+ on Hunting Equipment in Past 12 Months	49.8	+42.6
Clothing Expenditures - Amount Spent in Total: $1,000+	5.5	-3.5
Home Remodeling - Amount Spent in Total: $5,000+	9.5	+2.3
Domestic Vacations - Amount Spent in Total: $1,000+	38.7	+9.0

patterns within the category and across horizontal categories.

By inquiring more comprehensively into other aspects of the audience's lifestyle, attitudes and behavior outside of field sports, the research could also open doors toward non-endemic advertising opportunities. The inclusion of inquiries into non-endemic categories like automotive, financial services and travel would allow advertisers in those spaces to see the value of an audience that was demographically and attitudinally aligned with their target market criteria.

By becoming an expert in both the content and category-specific realities of the outdoorsman across his life, Versus Country would now be able to position itself not just against its media rivals but also assert itself as a knowledgeable point of entry for those advertisers seeking to connect with the Versus audience through their passion for field sports.

There would also need to be a more robust approach toward uncovering the target's levels of engagement within the field sports category. Insights would need to be derived that could articulate the key drivers of satisfaction, both within the sport and within the media that cover it. Linkages would need to be drawn between these drivers and the ability of various media to deliver on them. Individual programming content would need to be analyzed and dissected across the competitive set. The resonance of specific on-air personalities and experts and the ability of the outdoor audience to properly associate them with defined brand essence statements for each media could further enable Versus to more richly assess its programming environment.

Build a sampling plan

With the objectives and desired study utility clearly defined, the next challenge was to carefully build a sampling plan. Sports and Leisure Research Group tapped into a sampling universe of sports enthusiasts and participants culled from multiple best-of-breed online panel sources. With the firm's principals actively engaged in industry efforts to mitigate respondent quality issues, great care was exercised in not only selecting sample sources that met respondent quality criteria but also in building multiple up-front and topic-blind levels of screening questions into the survey instrument. The screening questions measured participation and commitment levels to a variety of sports activities (inclusive of field sports) before delving into more specific inquiries on vertical media usage within the category.

Careful quota design and A/B/C version splits were deployed to maximize the topics to be explored in depth, without sacrificing overall projectability of the findings. Similarly, with the planned objective to leverage the findings into custom insights that could be packaged for specific advertisers and prospects, the research teams incorporated brand usage and preference questions for the top endemic brands. This could be used to gauge the audience's level of engagement with the brands and to potentially derive profiles specific to an advertiser's customer base.

Leverage the findings

Upon completion of the fieldwork (559 completed surveys among male hunters and anglers age 18+) and analysis, the key thrust of the project team was to determine the best means with which to leverage the findings and their implications for Versus and its advertisers. First, the data showed superior demographics, endemic category spending patterns and field sports participation levels for Versus viewers relative to the competitive set (Figure 1).

Further, the data gave the Comcast sales and marketing teams a platform from which to position its audience as category influencers, thus indicating an opportunity for advertisers to extend their reach by connecting with the Versus audience. Versus Country viewers also demonstrated a greater propensity to spend in non-endemic categories that would be attractive to advertisers outside of the vertical space.

We also compared the study results with a syndicated research proxy (using Boolean logic) of "male adult Versus viewers" AND "participate in hunting in the past 12 months" OR "participate in fishing in the past 12 months." The frequency of Versus viewers' participation in hunting was roughly comparable across the two studies, while the Sports and Leisure Research Group data suggested that Versus viewers were more likely to participate frequently in fishing activities. Most interesting, however, was a comparison between respondents' self-identified spending levels in the endemic categories, which was an order of magnitude greater among the Sports and Leisure Research Group sample. At the same time, a further comparison with non-endemic spending categories (e.g., clothing, home remodeling) indicated results that were more in line with the syndicated data (Figure 2). Our conclusion: directly speaking with our viewers indicated a level of passion and commitment to the outdoor activities even beyond our expectations.

The data also opened windows to redefine "purity." While certain endemic advertisers questioned the format change from Outdoor Life Network to Versus as one that detracted from an outdoor focus, cross-media evaluations within the research demonstrated Versus Country as more efficient in reaching committed and influential field sports enthusiasts, as well as more captivating in its content and the resonance and credibility of its on-air personalities. Of all the outdoor program hosts evaluated in the study, Versus' host Bill Dance ranked No. 1 as "One of My Favorites." Versus' hosts took four out of the top five spots and eight out of the top 10.

Educate clients

Finally, the research captured and crosstabulated habits, behaviors and attitudes of outdoor sports enthusiasts toward a variety of leading endemic and non-endemic brands. This data was crafted into custom modules that could be presented by the sales force help clients better understand how they can differentiate themselves against their own competition through a marketing relationship with Versus.

For example, for a large outdoors retailer, the Versus sales team provided a side-by-side comparison of the outdoor participation habits of their own hunting/fishing customer and how they overlapped with the Versus audience. The insights into their own customers, in addition to the insights into the viewing patterns and preferences of the hunting/fishing viewer, helped build an ongoing partnership with the retailer.

On the programming side, the research confirmed the importance of having entertaining, relevant programs with knowledgeable hosts. Versus subsequently reaffirmed its commitment to having quality shows with the most trusted and credible presenters in the industry. A young talent named Benny Spies will host a show beginning in fall 2010 called *Gun It with Benny Spies*. Spies has the potential to be a true crossover star whose show could resonate outside of the traditional field sports audience. Starting in 2011 – with ESPN2 scaling back on most of its outdoors programming – Versus, in more than 75 million homes and the fastest-growing sports cable network in the country, will continue to offer the most audience reach in the genre.

Richer understanding

It has been said that research in the media market is analogous to a lamp post, in that some use it as a support to lean upon while others use it for illumination. The research strategy and its application here met both criteria. Sports and Leisure Research Group partnered with the Comcast insights team to design a proprietary study that allowed Versus Country to both explore the benefits and challenges created by its rebranding while simultaneously garnering a richer understanding of its audience. | Q

social media research

Something ventured, something gained

Considerations when employing a market research online community

By Julie Wittes Schlack

Up until about 10 years ago, the differences between qualitative and quantitative research could be clearly articulated. Qualitative data took the form of words and pictures; quantitative data was expressed in numbers. Qualitative was conducted with a maximum of 15 people at a time and usually in real time, while quantitative typically required a sample size at least in the hundreds and could be conducted synchronously or asynchronously. But with advances in text analytics (which enable researchers to quantify what is essentially qualitative data) and the kind of inquiry and feedback enabled by Web 2.0 technologies, the boundaries between the two forms of research are blurring.

Accelerating that fusion is the explosive growth of market research online communities (MROCs). And compounding the confusion is the concept of the "panel community" - panels from which small groups can be sliced off for more intensive qualitative work.

These trends have become flashpoints in a larger debate about sample size, respondent quality and reliability. When does qualitative morph into quantitative research? What's the difference - if any - between a panel with some community features and a community with some survey capability? Is one environment better able to assure respondent quality than another? And what's the magic n needed for researchers to feel confident in what they're hearing?

In this article, we'll explore the broad question of how research conducted in this kind of social media context is fundamentally reframing traditional choices, creating both new risks and new opportunities. First, though, some definitions and background.

Get to know their customers

Back when Mad Men referred to advertising professionals (and not to the acerbic television show about them), brands tried to get to know their customers through qualitative techniques like focus groups and through quantitative means like telephone and mail surveys. Then along came the Internet, and, just as the advent of television led to a rash of televised radio plays, market researchers used the Web to do what they'd always done - administer surveys - but do so in a more time- and cost-effective manner.

But just as TV viewers started

snapshot

The author outlines some of the specific trade-offs (big vs. small, general vs. specific, pure vs. passionate) that researchers make in choosing to use market research online communities.

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to hunger for more than the chance to watch talking heads, with Web 2.0 and its emphasis on collaboration, conversation and consumer-generated content, consumers began taking a more active role in their feedback to companies, demanding to be not just respondents but advisors. Empowered by public online forums and social networks – some brand-sponsored, some wholly independent – consumers now have venues in which to offer both solicited and unsolicited input to major brands. The locus of control has shifted somewhat from the researcher asking survey questions tied to a moment in time to the consumer spontaneously posting reviews and stories, generating a continuous stream of input.

While that white noise of online sentiment can be useful – especially for objectives like brand monitoring and reputation management – it creates as many problems for researchers as it solves. After all, how typical are these blogging, tweeting online activists? And while it's all well and good to try to mine insight from their conversations, researchers still have specific questions in need of answers.

Hence the allure of panels and online communities. Both enable the capture and tracking of information about who is expressing what views. Both enable researchers to test stimuli and get specific answers to specific questions in a fairly secure manner.

But they also differ along some key dimensions. Surveys capture sentiment at a moment in time and don't enable the continuous source of insight that long-term communities do. They can provide more measurable, projectable data but are relatively tone-deaf to the nuance and texture of more spontaneous, consumer-generated, multi-modal expression (i.e., text, images, video, etc.) that communities support. They are useful for confirmation and validation but can be of limited value for discovery and innovation.

In an attempt to provide researchers with the whys behind the whats, some panel companies offer custom or "communi-panels" in which a small group (200-500) of panelists are invited to not only respond to surveys but to talk to the client company via a basic online discussion board. However, these groups are typically short-lived and reactive – reflecting the essentially project-driven approach typical of survey research – and typically generate less engagement and participation than do their long-term counterparts.

In contrast, the hallmark of longitudinal organic or recruited communities (not mere panel spin-offs) tends to be shared passion or purpose, relationships with other community members and reciprocity on the part of the sponsoring brand, which reveals its identity, acknowledges what consumers are saying and, wherever possible, closes the loop with them by sharing if and how the brand is acting on that input. But these very strengths of private online communities – long-term relationship, intimacy, high engagement and transparency – raise concerns about data validity, projectability and bias. And the typical size of these communities – 300-500 members – creates confusion as to whether they're qual or quant.

Risking and gaining

So what's a market researcher to do? Reframe the choices. Market researchers need to understand what we are risking – and gaining – by shifting our focus and methods, by looking beyond dichotomies like data vs. insight or quant vs. qual. We need to think in terms of informed trade-offs and then ask ourselves: "Given these trade-offs, what's the best tool for the job?"

Following are some of the trade-offs that are especially germane to today's social media environment.

Big vs. small

Historically, the benefits of having large numbers of research respondents were obvious. Large samples could be representative of the general population and robust enough to surface statistically-significant differences between responses, creating confidence in the projectability of the findings. However:

Not every insight needs to be projectable. When trying to forecast sales, it's crucial that your survey sample be as typical of your target audience as possible. But it takes only one thoughtful or personal disclosure to shed light on an unmet need or new opportunity. Your most passionate, articulate consumer may not be the most typical one but may well be the most valuable one. And if your target audience definition is specific enough (e.g., platinum-level frequent fliers; men who wax their cars at least twice a month), you may indeed feel comfortable generalizing from a relatively small sample size to that entire target.

Poor respondent quality can amplify mistakes/misdirection. Straightliners, speeders, phantoms ... a whole new lexicon has sprung up to describe the entrepreneurial, if unethical, group of people who create multiple online identities with the goal of taking as many paying surveys as possible in the shortest period of time. Panel and online community companies are continually developing new methods to identify and weed out these people but their mere existence leads one to question the assumed benefit of large sample sizes.

Big numbers don't yield high participation rates. In a typical large public forum or online community, 1-9 percent of visitors post original content and the remaining 90-99 percent "lurk." Even in large private communities (10,000+ members), active participation averages about 20 percent, meaning that 80 percent of site visitors don't participate. In contrast, research conducted by Communispace Corporation across 60 of its own small (300-500-person) private online communities and over 25,000 members showed an average lurker rate of only 14 percent. The intimacy of small communities makes members feel listened to and helps them be heard, and that, in turn, fuels greater engagement.

These points aren't meant to refute the legitimate statistical arguments for the importance of large sample sizes for specific tasks, such as sizing markets and predicting sales. But increasingly, some market researchers will rely on smaller, more highly-engaged samples to generate and validate key insights, tweak concepts and test and refine surveys that they then take out to a larger sample size later in the process. Then once a product or campaign is out in the marketplace, they'll employ Web mining and other passive listening platforms to monitor awareness, buzz and general sentiment.

General vs. specific populations

"Representative" is an increasingly questionable concept. With the majority of the U.S. population online and many American consumers engaged in some form of brand feedback – whether through posting reviews, taking surveys or becoming "fans" of specific brands

– it's difficult to define representative populations in anything but strictly demographic terms. And with traditional market research targets like first-time moms spanning ever-widening age ranges, and broad definitions like Hispanic or African-American ever more open to interpretation, even conventional demographic definitions can be less precise or meaningful than they used to be.

While this trend can be problematic for research in certain product categories, it also creates new opportunities in a market that's increasingly niche-based and long-tailed. Relevancy in products and messaging is critical to a brand's success, so researchers often have more to gain by listening to the "right" group of people than they do by trying to generalize findings to a generic population.

There are many ways to gain access to that targeted group – by commissioning custom panels, mining content from the blogs and public forums they frequent, by pushing surveys to members of Facebook and other social networks who fit a given profile and by recruiting them for private communities. But regardless of method, the more successful you are in engaging and retaining them, the more likely you are to arrive at actionable insights.

Pure vs. passionate

Inherent in the notion of a "pure, untainted" sample is that the researcher is having a one-time encounter with a neutral group of respondents. To the extent that this replicates real-world conditions (e.g., testing ad recall based on a single exposure), that's a useful framework.

But answering questions posed by an anonymous brand, with no view into if and how one's responses are going to influence that brand, is rarely an emotionally-engaging experience. Most respondents will try to be polite and answer the researcher's questions with as much precision as the format allows. But the price paid for that singular, pristine encounter is superficiality. After all, from the consumer's perspective, they are being asked to give advice without knowing who they're talking to or why the research sponsor is asking. Think about how much more focused your own book or restaurant recommendations or parenting tips are when you know who you're advising – better still, when you have a reciprocal, long-term relationship with them – and the reasons why more bilateral research methods can yield higher quality insights become obvious.

While episodic survey research can be relatively inexpensive and provide solid feedback, there are also tremendous benefits to be derived from longitudinal work. Does the sauce taste as good on the fifth use as it did on the first use? Do patients take their medications as religiously once the prescription bottle turns cloudy? What triggers attrition from one product or trial with another? Is today's message more compelling than the one we came up with last week? These are answers that can only be effectively derived from understanding how consumers' attitudes and usage evolve over time, from iterating with the same group as you develop and refine products and messaging.

Of course long-term relationship with the same individuals understandably raises concerns about positive bias. But innovation research tells us that it is the lead users – the ones most knowledgeable and passionate about a given brand or category – who often generate the ideas and fuel the organizational will to change and improve products. And research conducted by Communispace Corporation across 15 of its CPG communities and over 2,300 members suggests that:

- Community participation leads members to feel heard by the sponsoring brand.
- As a result of feeling heard, they feel a greater affinity with the brand.
- That greater affinity results in more candor, not less.

Based on both content-coding (counting instances of negative feedback, positive feedback and rationale for both) and on concept ratings, the research indicated that community members were actually slightly more critical of individual concepts being tested. As with close friends or family members, their candor increased with their emotional investment in the brand's success.

By the same token, that ongoing relationship with the sponsoring brand makes private communities a poor choice for testing brand awareness or even elasticity.

Infusion of inspiration

Stan Sthanunathan, vice president – marketing strategy and insights at Coca-Cola and co-chair of the Advertising Research Foundation's Online Research Quality Council, noted in an interview with Robert Bain in the October 22, 2009 issue of *research*, "People are too focused on probability and non-probability samples, people are too focused on respondent engagement – this is all about making minor changes to what we are doing right now. Those are all necessary, but they're not sufficient conditions for the success of the [market research] function ... The clients are saying, 'Inspire me, help me to take some transformational action' and we're busy creating better mousetraps."

Multiple, and sometimes blended, 21st-century market research techniques can help the industry move beyond validation and provide that infusion of inspiration. Scaling the transparency traditionally associated with qualitative or ethnographic work can yield engaged, motivated participants who generate higher-quality insights. Leveraging online and mobile technologies enables research in more naturalistic settings that feel safe, maximize participant comfort and encourage intimacy. And above all, coming out from behind the glass and building real relationships with "respondents" leads to a deeper knowledge of research participants as real people, enabling researchers to feel greater confidence that they know and can trust them.

That seems worth the tradeoffs, doesn't it? | Q

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STATISTICS
DATA CENTRAL
GO TO MARKET

Consider the source

Thoughts on sampling and weighting in social media research

By Annie Pettit

When was the last time you carefully crafted a survey, designed perfectly-worded questions and then passed the survey out to anyone who wandered by you on the street? When was the last time you spent hours building the most balanced and unambiguous survey and then calculated the results using just the first 1,000 returns, of which 900 were from women and 100 were from men? When was the last time you carried out marketing research with a complete disregard for sampling and weighting?

Clearly, you haven't. So why do we throw the concept of sampling and weighting out the window when we think about social media research? Sampling is a mainstay of nearly all marketing research because it is neither financially nor logistically feasible to capture the opinions of every single individual in a research population. And, we usually have a goal or strategy in mind, a reason for talking to the people we talk to, when we're developing a research program.

Social media research embraces the same tenets as other types of research such as survey research. It is not feasible to scour the entire Internet every single day searching for every last mention of every brand. Databases are not large enough to hold all of that data, nor are the days long enough to find all of it. Effective sampling for social media research, therefore, entails gathering sufficient data from sufficient sources such that the sample of results gathered can be generalized to a wider population. A well-developed sampling plan ensures that the full range of online opinions and perspectives is reflected in the data in the appropriate proportions.

Traditionally, sampling is used to identify which groups of people, perhaps business owners or mothers of teenagers, will be asked to respond to a survey. In the social media research space, sampling doesn't refer to the selection of individuals based on their demographics but rather to the selection of Web sites based on the type or description of the source. As such, the sampling frame for social media research consists of all blog entries, status updates, product evaluations, video and photo comments, forums and many other types of written contributions on the Internet.

An important consideration is that researchers can only sample from publicly available verbatims. Some Web sites, such

snapshot

When analyzing data from social media, the choice of a sampling plan depends on the purpose of the research and how those results will be used afterwards. The author discusses three options and some of the issues surrounding the use of data from social media.

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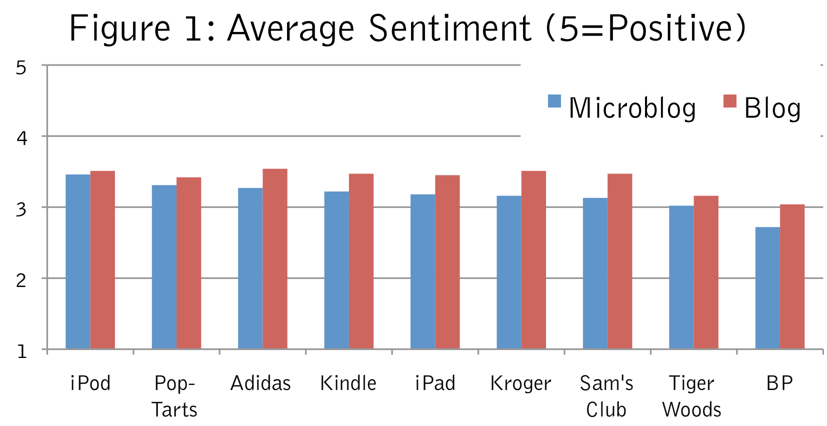
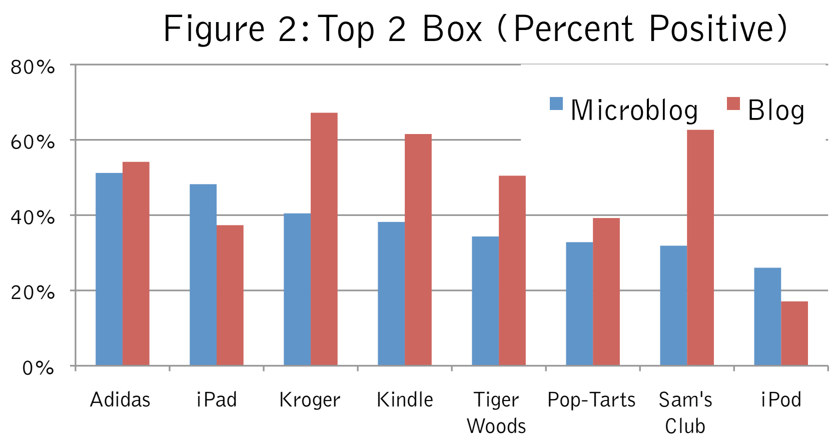
as Facebook, only release certain pieces of information to the public Internet because the users have given Facebook permission to share it. It is, of course, possible for a researcher to log into their own personal Facebook account and read or harvest the private information, but this is simply not feasible or ethical. Other Web sites, such as Twitter, only publicly release a portion of their data. Even though it is possible for a researcher to sign into Twitter and access all of the data, it may not all released outside of Twitter.

Working hand-in-hand with sampling to promote the reliability and validity of results is the process of weighting. Weighting means that results from certain subgroups of people are given more or less prominence when the results are being calculated. For example, if the intention of survey research is to produce results that generalize to the general population, it is important that the survey sample consists of men and women in census-representative proportions. If sampling is unable to accomplish this, then skillful and appropriate weighting can create the desired effect.





Make the difference

In the case of social media research, the combination of sampling and weighting ensures that even when the quantity of data coming from different sources changes from week to week, the change won't bias the results. Given the penetration rates and active user rates that vary tremendously by Web site, sampling and weighting can make the difference between valid and invalid results. For example, consider a situation where one particular Web site has many users who make comments, of which only a few are released publicly by the Web site. Then, consider a second Web site that has fewer users who make many comments, of which a larger percentage are released to the public. A research plan needs to consider whether it might make sense to allow one source to overpower the results, or if sampling and weighting must be used to equalize the voices.

Let's consider a specific situation. Using Alexa (www.alexa.com/siteinfo), we determined the penetration of seven very large, global Web sites. Most people are aware of these Web sites even if they don't use them. Among Internet users, about 34 percent use YouTube while about 7 percent use Twitter. Then, we gathered a random selection of data from the Internet that mentioned the iPad and reviewed the sources. During the same time period, only 2 percent of our sampled data came from YouTube whereas about 62 percent came from Twitter.

Does this mean that Twitter users are the people appreciating and buying the iPad? No. Does it mean we should allow the 7 percent of people on Twitter to let their voice - which is 62 percent of the data - overwhelm the rest of the data to be the final voice of the iPad? Maybe. Maybe not. Does it matter where the data comes from?

The fundamental reason for sampling is that different people have different opinions. If this wasn't true, a sample of one would be all you ever needed to generalize to the population. Figure 1 illustrates average sentiment scores for nine different brands. Scores range from 1 (negative) to 5 (positive). Sample sizes for each brand are at least 2,000. The verbatims were grouped according to their source, and in this case, we focused solely on microblogs (such as Twitter or identi.ca) and regular blogs (such as Blogger or WordPress).

Verbatims on microblogs generally have a more negative tone than those on blogs, perhaps because microblogs are more likely to reflect off-the-cuff opinions while blogs are generally more thought-out and rehearsed. And, across the various brands, the difference between the two sources ranges from slight to one-third of a point on a five-point scale, a significant difference for market researchers.

But, average scores aren't the entire story, as market researchers understand the importance that top-box and bottom-box scores have as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Toluna provides a comprehensive survey offering, superior respondent access, a 360 degree approach to customer management and focus on quality.
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- Consumer, B2B and Healthcare, proprietary panels
- World-class advanced questionnaire programming and hosting
- 24/7 global service project management and support
- Unique technology products - custom panel and community building with PanelPortal™, web-based DIY survey tool QuickSurveys™, mobile survey capabilities and online ad tracking
For more information please call 1.866.296.3049 or email toluna@toluna.com
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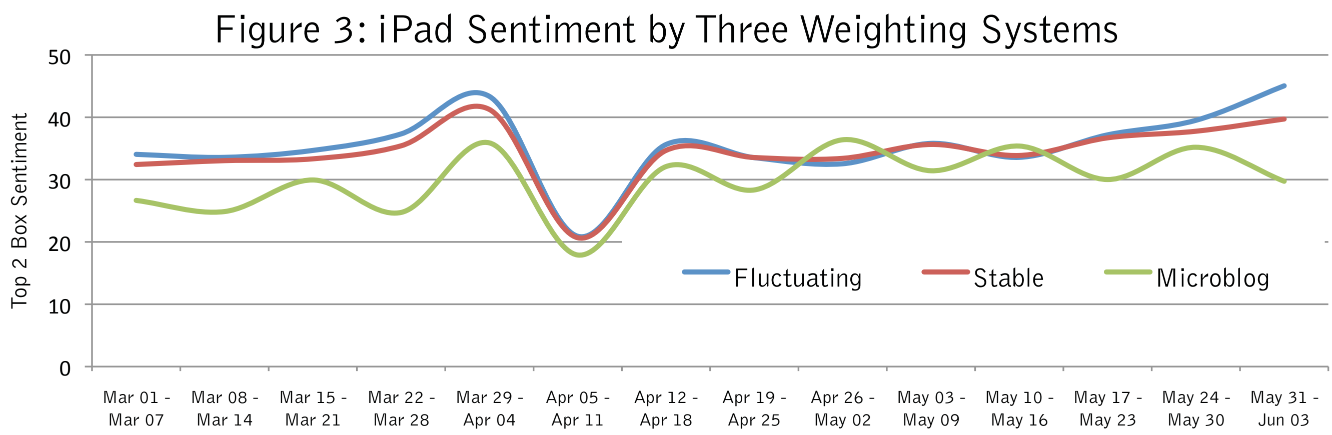


estimates of "passion." In Figure 2 the brands are compared using top two-box scores, or the percentage of verbatims that generated a positive sentiment.

Unlike average scores, top two-box scores fluctuate wildly from source to source. For the Adidas brand, microblogs and blogs produced very similar top two-box scores of around 50 percent. However, for Kroger, microblogs generated top two-box scores of about 68 percent while blogs generated scores of about 40 percent. Blog postings are generally more positive than microblogs, but the trend is very unstable. In the practical world, the effect of gathering data from different sources without considering sampling or weighting means that differences can easily reflect a vendor's data collection practices as opposed to generalizable consumer opinion.

What follows is a practical example of how the lack, or misuse, of weighting systems can affect research results. Using the same sample of iPad data, which was gathered from a variety of sources such as blogs, microblogs, news sites and comment sites, top two-box scores were calculated in three different ways.

Fluctuating: Top blue line - Scores were averaged together and sources contributed different proportions of data during each time frame.

Stable: Middle red line - Scores were weighted such that each source contributed a similar percentage in each time frame. For example, if blogs contributed on average 25 percent of the data, then verbatims from blogs were weighted to contribute 25 percent of the results in each week.

Microblog: Bottom green line - The weight of microblogs was increased and made stable from week to week.

Though all three methods show increases and decreases in sentiment at similar time frames, the magnitudes of those changes resulted in very different trendlines (Figure 3). Depending on the weighting system selected, completely unwarranted business decisions could easily be made. (Note: The iPad was released on April 3, 2010 in the U.S., and May 28 in Canada and Europe.)

Depends on the purpose

So, what is the right weighting scheme to use? Similar to survey research, there may not always be a perfect weighting system that can account for data collection vendor differences, data cleaning processes and other intricacies of social media data. The choice of a sampling plan depends on the purpose of the research and how those results will be used afterwards. Just as we have learned to create and use the appropriate sampling plans for survey research, the same holds for social media research. But there are some simple starting points from which many more options will evolve.

Option 1: Raw and unweighted
Using data in its raw, unweighted form is most suited for customer relationship management work. The volume contributed by sources will fluctuate from time period to time period, and reflect the priorities of the data collection vendor. However, sampling processes are not required in order to identify individuals who have complaints and then react to those complaints.

Option 2: Stable weighting
This is a simple weighting option that ensures that each source contributes the same volume of data in each time period. Single sources can be weighted up or down as desired, but the system ensures that volume spikes of one source do not affect the entire set of data. This is one method for countering the effects of vendor differences.

Option 3: Internet-representative weighting
Use a third-party source such as Alexa to identify the penetration of various Web sites. Then, apply those penetration rates to the data such that results are weighted according to Internet penetration as opposed to vendor data collection strategies.

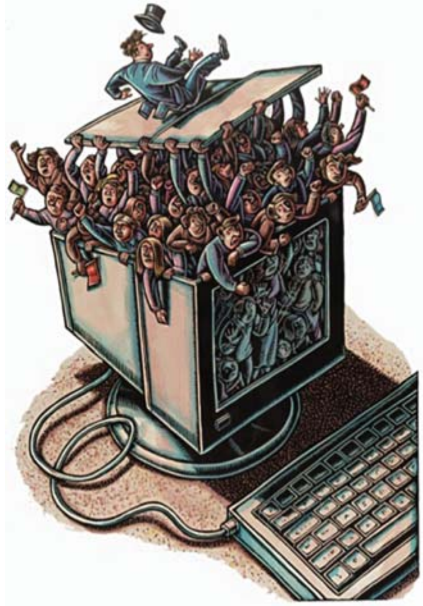
Treasure trove

Social media data is a treasure trove of potential insight. We have learned that simply gathering data and averaging whatever numbers result can easily lead to the dissemination of misinformation and ultimately to poor business decisions. Understanding the complexities behind sampling and weighting is one step toward improving the validity and reliability of social media data and social media research. | Q

social media research

Making sense of the chatter

Cracking the code of social media data analysis



By Thomas Malkin

For some researchers, information generated by social media has become a worthwhile source of complementary data. When the directional insights from social media are integrated with the representative opinions garnered from traditional marketing research, they give full voice to the needs, wants and viewpoints of the customer and can help achieve optimal decision-making. But for many in our industry, the task of making sense of the flood of words generated by the social media outlets is daunting, to say the least.

One way to extract insights from the torrent of consumer opinions is to apply the methodology market researchers use to analyze open-ended survey questions: coding. The coding approach to analyzing unstructured comments involves readers quantifying positive, negative or neutral opinions after they've matched the subjects (i.e., "Cell Phone Product X") in the text with categories or classifications. These categories typically represent consumer passions or issues that drive purchasing decisions (i.e., opinions around apps or multimedia for the cell phone product category).

The challenge in adapting coding to social media is that reading through the vast amount of constantly-changing data on the Internet is overwhelming and expensive. Technology is thus needed to automate coding so the high volume of historical and daily social media data is not a barrier to obtaining insights from this valuable trove of data.

For automated coding to achieve accuracy, especially in social media where people communicate with familiarity in blogs, forums and social utility sites like Facebook, one approach is to go beyond keyword-based technology and take into account the implicit subject, implicit issue and context-dependent sentiment. An example of an implicit subject is, "This phone has a great battery life," in which the type of phone isn't explicitly mentioned. An example of an implicit issue is, "This camera is too large," in which the category or classification - size - is not explicitly mentioned. And an example of a context-dependent sentiment is, "This battery life is long," in which "long" makes this opinion a positive sentiment whereas long means something negative in the opinion, "This movie line is long."

This type of rubric allows

snapshot

While analyzing data from social media is something new to researchers, one way of extracting meaning from the data isn't. Old-fashioned coding - with an assist from technology, of course - is an approach that can generate useful insights and bring clarity to a seemingly murky process.

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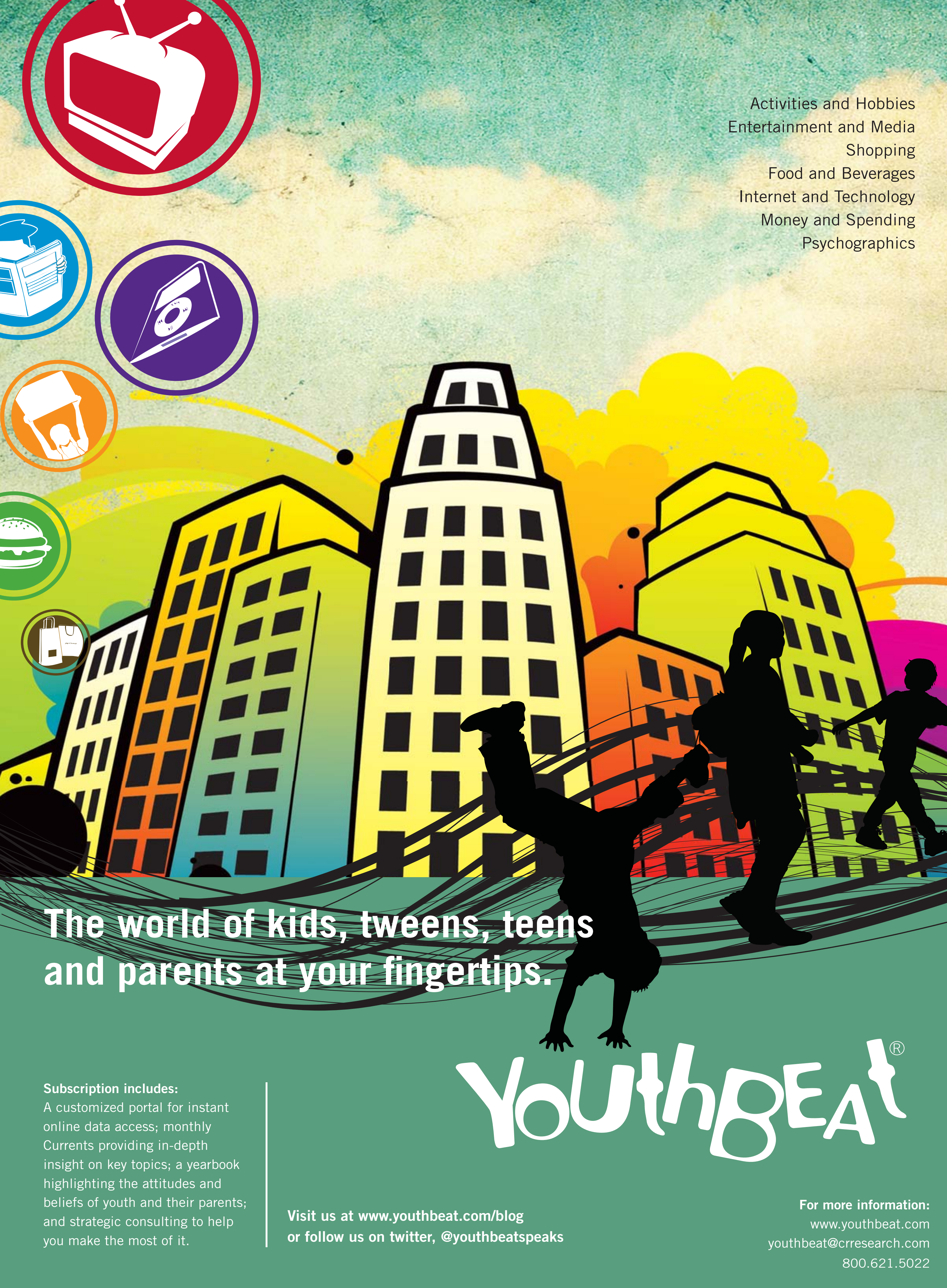
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researchers to compare brands or products to each other based on the issues that resonate with consumers rather than just brand buzz. For example, if Brand X has an 83 percent positive sentiment on the topic of customer satisfaction (the 83 percent representing a ratio of the overall positive and negative opinions), that could very well meet the prior expectations of Brand X. However, if Brand X's competitors are achieving a positive sentiment on customer satisfaction greater than 87 percent, Brand X now has a decision to make as to whether it wishes to do something about this disparity. Doing a competitive trend analysis over 12 months on customer satisfaction would give direction to Brand X and its competitors as to when each brand experienced more or less positive and negative opinions (i.e., daily, weekly, monthly, etc.) and where in social media such opinions were expressed. The advantage that social media provides over other data sources is that Brand X can efficiently learn why consumers consider its competition to be better on customer satisfaction by simply drilling down to read the actual comments about Brand X or all of its competitors from their original online sources.

See the correlations

With the availability of social media-generated input, a starting point for decision-making is to get a measurable, story-style read on a product's or brand's positioning relative to a competitive set on the issues that drive purchasing decisions. Researchers can now not only see how many opinions have been expressed on three dimensions of data - the subjects, issues and sentiment - but also see the correlations among those three variables as well. In addition, issues or subjects that may not be talked much about and thus typically overlooked by decision makers can become directionally insightful if they are spoken of in the context of or relative to something else.

Let's say a beer brand in the craft beer category is trying to win market share by going green. In a 12-month study on the category, the issue or code "green initiative" is not spoken of very much among the

Using social media to track the Tiger Woods saga

For a more detailed example of how a marketing research firm has used social media research, Thomas Malkin spoke to Jon Last, president of Sports and Leisure Research Group, White Plains, N.Y.

How have you used social media in conjunction with your traditional marketing research?

"We tracked the magnitude and tonality of Web conversation and opinion about Tiger Woods over 1,100 disparate and relevant Web sites from January 2009 through mid-March 2010, right after Woods' public statement in February, to see if it was consistent with our attitudinal survey research that was part of our winter 2010 omnibus study. In the omnibus study, a national sample of nearly 1,000 avid golfers agreed that the rancor regarding the transgressions of golf's greatest player would dissipate significantly by the summer months. Further, this study suggested that for the most engaged and passionate fans, Tiger's on-course achievements far outweighed any personal shortcomings."

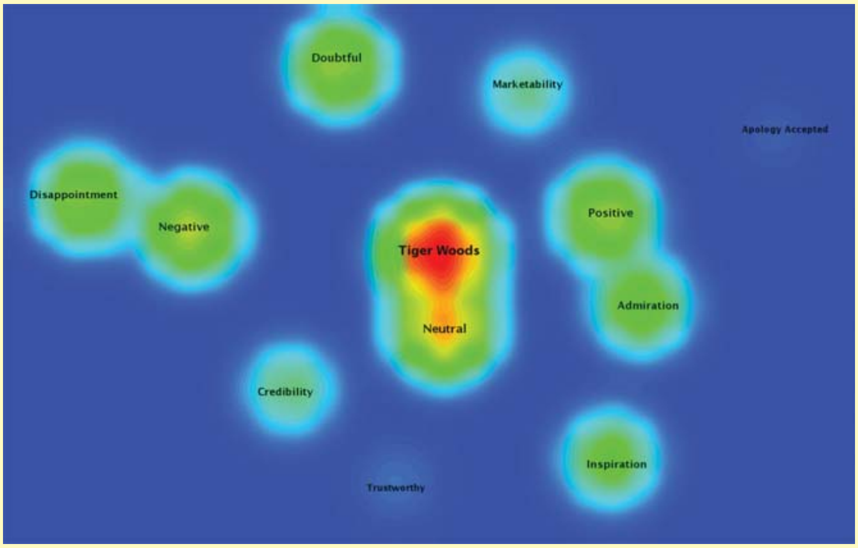
What were your findings upon benchmarking the insights obtained from social media with those from your prior attitudinal research?

"As one might expect, the level and tonality of buzz regarding Tiger was at its peak immediately after his November accident. But this chatter quickly and precipitously dropped in the first month of the new year, spiking again, though at nowhere near the level of November, around his mid-February statement. By March, the level of online conversation was back to pre-scandal levels.

"Upon further assessment, we looked at the tonality of the conversations pertaining to those opinions on Tiger. We developed codes that could be used to measure the tonality relative to some of the findings of our prior attitudinal research, selecting 'admiration,' 'apology accepted,' credibility,' 'disappointment,' 'doubtful,' 'inspiration,' 'marketability' and 'trustworthiness,' among others. Our analysis demonstrated that conversations in social media were on par with the conclusions that we drew from the traditional quantitative study.

"From an illustrative standpoint, if you take a look at an issues trend analysis, you'll see that before the

Figure 1: Tiger Woods Social Media Story Before November 20, 2009



several brands in the competitive set. But when opinions on this issue are expressed, they are usually done so in the context of a couple of brands in particular, and both brands have distinctly different volumes of social media. Being able to visualize how the opinions correlate (see Figures 1 and 2 in sidebar) and then drill down to understand the actual story around "green initiative" provides directional insights for any brand in the craft beer category. This is especially true if the brand in question is not being acknowledged for its efforts by consumers across millions of social media outlets. Additionally, insights can be obtained by seeing stories emerge amongst the other issues measured in that study.

Once a historical read on a product category is obtained, monitoring becomes more impactful. One new form of measurement is the monitoring of changes in social media thought leadership on issues that resonate with consumers before and after an event. Emerging trend analysis and crisis management also becomes more thoughtful and less reactionary because researchers can get a better read on what course of action to take once they know the issues discussed, how they're evolving over time and how consumers are talking about those issues (especially in the context of and relevant to other issues or subjects). Such granular monitoring can also provide greater insights for communication strategies since opinions are quantified and weighted by source based on discussions on both the subject and issue.

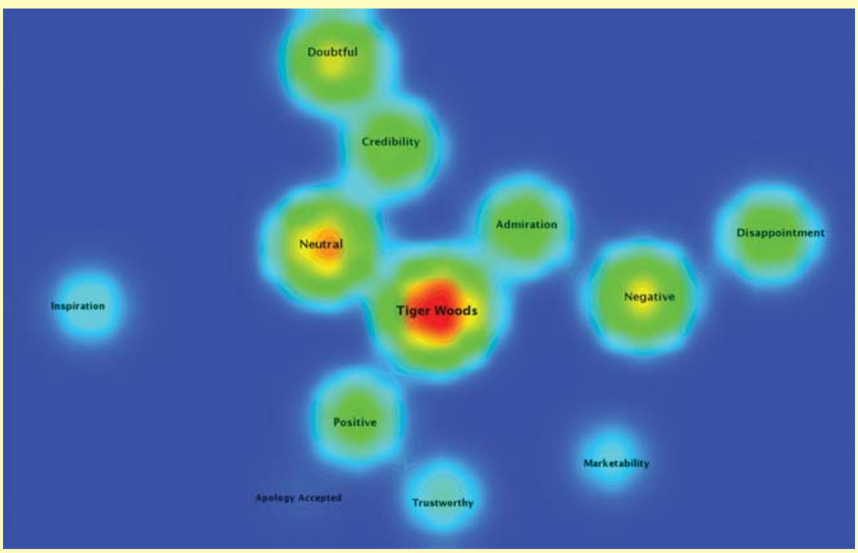
More breadth

Gaining an understanding of product categories based on the voice of the crowd in such a granular manner creates many applications for market researchers. They can benchmark the insights obtained against prior quantitative and qualitative research and see more breadth in the data that may otherwise have been missed. Typically, many more questions than answers are raised, leading to further exploration using traditional marketing research and, one hopes, a clearer and more complete picture of the market segment in question. |Q

crisis emerged on November 20, 2009, conversations on Tiger's character were focused on two issues: admiration and inspiration. From November to January, new conversations emerged on the issues of character, namely trustworthiness, marketability and credibility. Conversations around disappointment and doubt, which previously included opinions solely about his golf game, now included those about his character as well. In the second peak period in February, disproportionally fewer conversations were occurring under inspiration and trustworthy with new conversations emerging under apology accepted. Thus we were able to use the social media analysis to validate the earlier hypotheses drawn by our quantitative research. Golf fans were beginning to quickly move past the issue!

"Another illustration of the findings can be seen in the heat maps [Figures 1 and 2], both prior to the crisis and at the tail end of it. Prior to November 20 [Figure 1], you can visualize the intensity of conversations on Tiger himself, the issues or pre-determined codes and sentiment by looking at both the size and the color of the circles. [The smaller the circle and the lighter the color, the lower the frequency of conversation; the larger the circle and darker - i.e., green - or hotter the color - i.e., yellow - the higher the frequency of conversation, with the reddish colors showing the highest intensity.] You can also see the statistical correlations of the three data dimensions - subject, issue and sentiment - as indicated by how close the issues are to each other [The closer they are to each other, the higher the correlation.] Thus, it's apparent that conversations around admiration and inspiration are closer to positive sentiment and spoken of in the same context relative to other issues before the crisis emerged. As you can see on the second heat map [Figure 2], by March 22, the story was quite different."

Figure 2: Tiger Woods Social Media Story From March 10 to March 22, 2010



What are your conclusions about benchmarking insights from social media with those from your prior attitudinal research?

"While such analysis is not as representative as a well-designed quantitative attitudinal study, it does yield strong directional insights and provides breadth to our earlier findings. So, while I won't go as far as *Ad Age* did in suggesting the imminent demise of traditional survey research, I will assert that this capability presents us with a valuable new tool to enhance our understanding of fan sentiment. At the risk of further propagating the sound-byte society, I'd maintain that social media in concert with formal research is a conversation that all market researchers should be paying attention to."

trends in research

Now and for the future

The road ahead for marketing and advertising research

By John Wittenbraker

Innovation, insight, action ... all concepts that seem to be on everyone's lips in the marketing research profession. Whether it's marketers challenging themselves to maintain their relevance and currency in the corporation or marketing research providers staking out leadership positions in the marketplace, these aspirations are driving forces in our industry.

But how do we fulfill these aspirations? What does the future of marketing and advertising research look like? What professional and organizational traits will be successful in the future? What topics or areas will be hot? What tools will be required to get to where we need to be? What developments seem to be short-lived and what do we think will have enduring value in the next five to 10 years?

To help gain insight on some of these questions, GfK, in collaboration with the Advertising Research Foundation (ARF), undertook a survey of ARF members (and followers). The anonymous 10-minute interviews were conducted in February and March 2010 among 249 professionals on the ARF's e-mail list.

How do we feel?

We live in interesting times. Large multinational research firms are growing by acquisition and organic growth, marketers are challenging their research partners to provide more value, the Internet and digital innovations continue to transform the marketplace and new research technologies are being developed and commercialized. In the face of all this change, how do we feel about our profession today and what do we think we'll be like in the future? Respondents were asked to rate whether a variety of words or phrases describe the advertising and marketing research profession right now and whether they think the relevance of each one will increase, remain unchanged or decrease over the next five to 10 years.

snapshot

A survey of ARF members sought to identify some of the necessary traits the industry needs to develop and maintain in order to thrive and also looked at the topics and trends coming down the pike.

The industry is at a crossroad. Respondents say that these are exciting times but also challenging times. They predict that the future of the marketing research profession will be driven more by a combination of creativity and technical capability. These insights are based on a quadrant analysis (Figure 1) where the horizontal axis reflects where respondents feel we are today and the vertical axis shows how they feel things will change over the next five to 10 years. The lower-right quadrant illustrates

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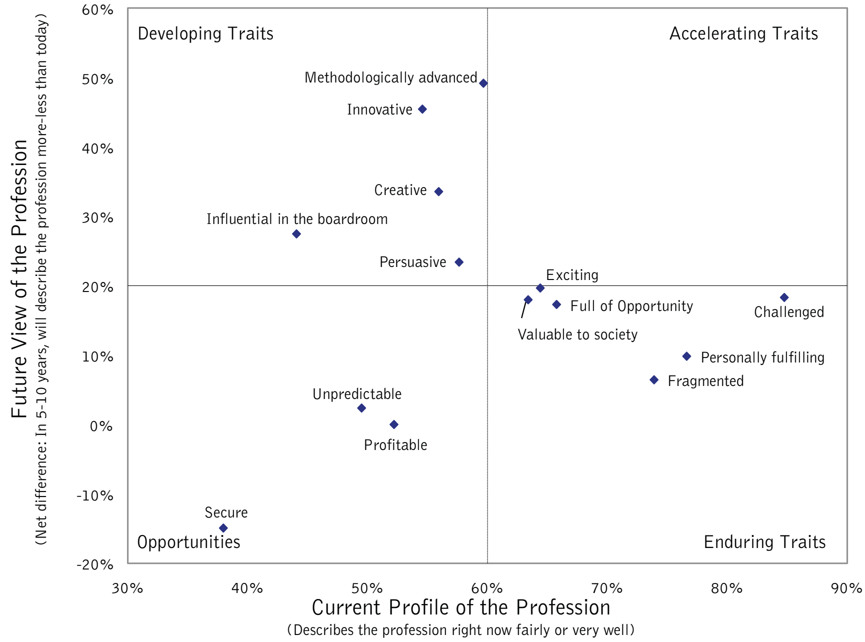
Figure 1: Future Traits of the Marketing & Advertising Research Profession



what could be considered Enduring Traits - characteristic of today, with little expected change in the future. While respondents feel the industry is challenged and fragmented they also find it personally fulfilling, full of opportunity, exciting and valuable to society. So even as we just now seem to be coming out of a recession, marketing research professionals feel that the industry is delivering value today and has promise for the future.

So what about the future? How will industry traits and success factors evolve by 2020? Our results show that professionals expect the industry to pivot in the coming years to be a more creative, yet more methodologically advanced, profession. First, note that none of the current hallmarks of the industry are predicted to accelerate in the next 10 years (the upper-right quadrant is empty). Nevertheless, many of the Enduring Traits in the lower-right will be more slowly dynamic, with a net difference in expected increase of 10 percent to 20 percent.

The more dramatic sea change is illustrated by the array of characteristics in the upper-left, Developing Traits quadrant. These are traits that are not strongly associated with our business today but are predicted to be more characteristic of the business in the next five to 10 years. At the top of the list is the prediction that the industry will be more methodologically advanced. This clearly reflects the growing complexity of the evolving marketing environment, the

Figure 2: Filtered Verbatims Associated with the Word "Data"

explosion of data sources available and the drive to develop ways to integrate all of this information to produce more incisive insights and drive better business decisions.

This conclusion is supported by open-end data captured in the survey. Respondents were asked to speculate about what the industry's biggest challenge will be in the year 2020. The most common word used in their responses was "data." When the analysis was narrowed on those verbatims that mentioned data, it was clear that the challenge is to have the requisite methodological/analytic capability to integrate large amounts of data from multiple sources and render meaningful and actionable insights (see Figure 2).

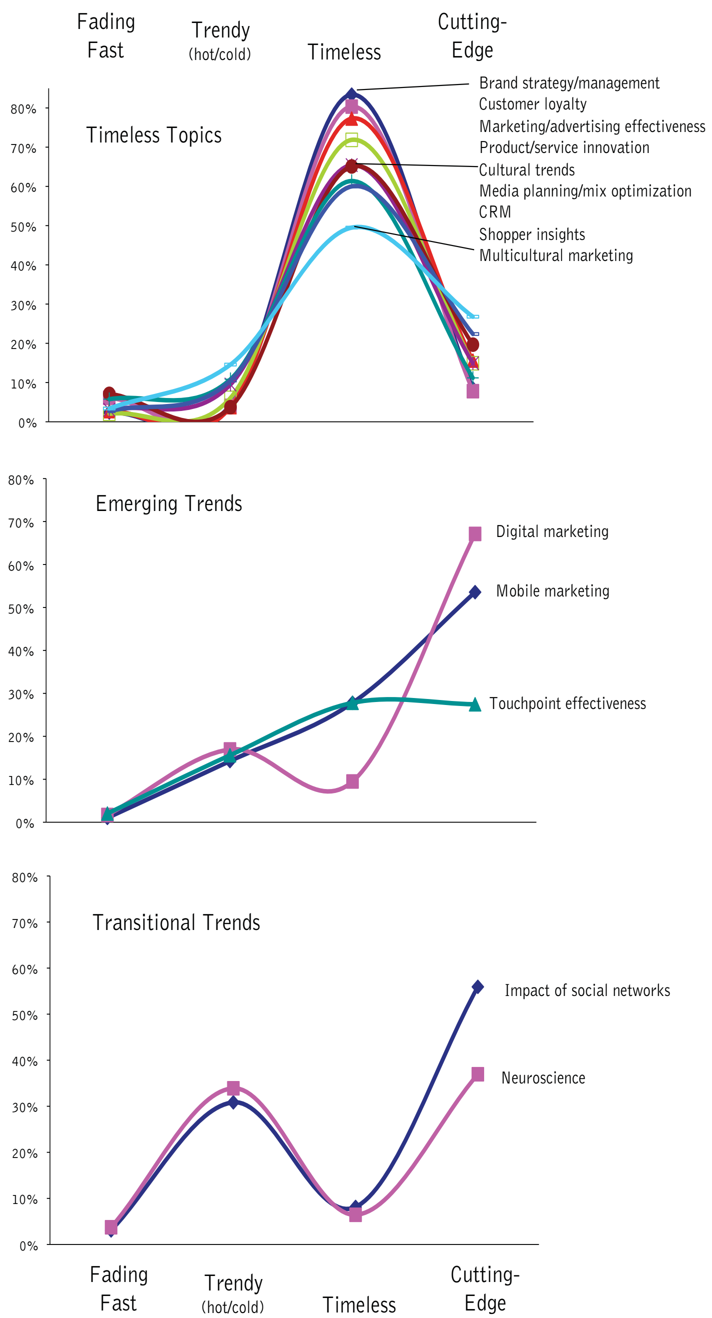
Interestingly, it's not just better methodological and analytic capability that people feel will drive industry change. Innovation and creativity are also Developing Traits, expected to be on the rise in the future. So despite the conventional wisdom in some quarters that the marketing research profession is being slowly marginalized into a commodity, results show that the rapid increase in complexity may provide a new rush of creativity into the industry. In the end, these advances should help us improve on some of the most important challenges the industry faces, namely, being persuasive and influential in the boardroom. The profession clearly has opportunity to improve on value delivery and our respondents predicted that the research community will rise to this challenge.

Is the industry ready for this change? Does the talent pool exist that's needed to meet this exciting opportunity? The data suggest that our success at capitalizing on this shift will depend on our ability to adapt to the skills required to drive innovation. Roughly seven out of 10 respondents felt that 1) "finding and keeping talented researchers" and "innovative thinking in market research" are both timeless challenges and 2) did not feel that it is getting any easier to find qualified people to work in advertising and marketing research.

Topics ebb and flow

With so much innovation going on in the industry, sometimes it can be

Figure 3: What Topics Will Be Hot in the Future?



a challenge to keep track of what's hot and what's not. Topics ebb and flow in professional and academic publications; we think about the new firms showing their wares at the ARF re:Think, IIR or ESOMAR meetings but this is mostly retrospective. What are the emerging trends? What topics are truly timeless? And what might be just passing fads?

The survey asked respondents to rate a wide array of topics as:

Fading fast: Its days are numbered.

Trendy: Here today, but maybe gone tomorrow.

Timeless: Tried-and-true and will be around for a while.

Cutting-edge: We'll be seeing more of this.

Respondents were also allowed to check for "Don't know" (hard to say) and "No idea" (for those were unfamiliar with the topic).

Three main patterns of response for the topics emerged. There was a strong modal response for a variety of Timeless Topics, hallmarks of the profession that appear to have enduring relevance (Figure 3, first panel). These include (in order of permanence): brand strategy/management; customer loyalty; marketing/advertising effectiveness; innovation; cultural trends; media planning/mix analysis; CRM; shopper insights and multicultural marketing.

There are two research topics that are truly hot Emerging Trends: digital marketing and mobile marketing (Figure 3, second panel). With large shares of advertising dollars shifting from traditional to digital media, it's not surprising to see research on digital media as a cutting-edge topic. Mobile marketing is not far behind, both in growing spend and as a hot subject for the research industry. And the blurring of the distinction between the two topics with the iPad, netbooks and emerging ideas and business models for streaming advertising across these platforms will most likely keep this area hot for the foreseeable future. However, taken in context with the dominance of the Timeless Topics above, industry professionals view these Emerging Trends to be more of a expansion, or evolution, rather than a revolution in the field.

Touchpoint effectiveness echoes the pattern of an Emerging Trend but had a weaker endorsement as Cutting-Edge compared to digital/mobile advertising. (In general, touchpoint effectiveness refers to how various channels and other modes of consumer contact - paid and unpaid - perform in communicating brand messages and impacting purchase. These might include advertising, customer service, public relations, point-of-sale, sponsorship, etc.) Overall familiarity with this topic was not as strong as for the other topics, which flattened the effect across the response options. Touchpoint impact is likely to continue to have currency as it is a component of the larger and more timeless "marketing effectiveness" topic noted above.

Finally, there are topics that we might consider Transitional Trends, seen by some as cutting-edge but viewed by others as passing trends (Figure 3, third panel). This bi-modal response was seen for "impact of social networks" and "neuroscience." While these topics may have been hot at one time, there is some evidence that they either may appeal only to a narrow niche in the marketplace or

Figure 4: What Tools Will Be Used In the Future?

perhaps have limited staying power. Time will tell how these transitions will resolve as these technologies are further developed in the marketplace.

Similar patterns

Digging a layer deeper, what do professionals think about the future relevance of a wide range of tools in use or in development in the research industry? Respondents were asked to rate these tools on the same Fading Fast to Cutting-Edge scale that was used for the research topics. Not surprisingly, similar patterns in the results emerged for tools.

Timeless Tools included the related media/marketing mix modeling and econometric modeling. Respondents also reported some core data collection methodologies as timeless such as online surveys, focus groups and ethnography (Figure 4, first panel).

Professionals view mobile and passive, behavioral measures of market response as Emerging Technologies (Figure 4, second panel). This includes data collection via mobile phone; passive data collection (GPS, RFID, microchip) and Web usage/tracking technologies.

Interestingly, it looks like Web tracking may already be maturing into a Timeless Tool as this is the modal response for this expanding technology. This could be accelerating due to the integration of this functionality into many online services like Google and Amazon.

Not surprisingly, the market research toolbox has a number of technologies that are seen as Transitional Trends (Figure 4, third panel). Most of these tools align with the topics that were seen as transitional. Social media/Web conversation monitoring and measurement, automated text analysis (semantic/sentiment analysis) and customized online communities were seen as Cutting-Edge by some, but Trendy by others. Similarly, just as neuroscience appeared as a Transitional trend, so was neuro/biometric measurement as a tool. Either because these tools are seen as relevant only to a segment of the market or because their broad-scale applicability is yet to be proven, these tools are in a state of flux in the marketplace. They may gain currency with a demonstration of broader relevance or may be relegated to narrower application.

Finally, among the tools included in the survey, only telephone surveys proved to be in decline. While telephone interviewing will continue to be necessary for some targets and in some regions, it's clear that the long-term viability of phone interviewing is not promising.

Quickly adapt

What does all of this mean for the marketing and advertising research community? Right now, marketing research is seen as exciting, fulfilling and full of opportunity. However, it's clear the industry needs to be able to quickly adapt to the growing complexity of marketing in a digital world and the expansion of data streams that becoming available from it. To achieve success in the world of today and of tomorrow, it's paramount that professionals marshal all these resources to provide marketers with a view of their own possible futures that will help them make better decisions today. |Q neuromarketing research

Too much information?

Let's be prudent in our use of neuroscience for marketing and advertising research

By John Owen

At a brain imaging center at a university in the U.S., a woman is lying face-up in a 12-ton tube. The room is darkened and a white plastic cage covers her face. She is surrounded by brightly-lit computer screens and is given strict instructions to lie still, as even the slightest movement could affect the accuracy of what is about to take place. The neuroscientist then starts to go about his work.

Given this scenario, you could easily be forgiven for thinking that a complicated and possibly risky medical procedure is underway. In fact, what's about to happen is that the neuroscientist is going to read the woman's mind.

Welcome to the world of neuromarketing - a relatively recent development by the marketing and advertising industry to try and understand how people think and thereby gain greater insight into how people react to visual and audio stimuli.

Unlocking our minds

Over the past 10 years, neuroscientists have spent an increasing amount of time researching ways to read people's minds through brain-pattern analysis, using techniques such as functional magnetic resonance imaging (fMRI). Already, scientists can predict with great accuracy the last thing you saw by analyzing your brain activity through a method of neural decoding, which involves scanning the brain while you look at thousands of pictures and analyzing how you respond to each one. Over time, this allows scientists to construct a general decoding pattern that can be used to identify an object you see without the need for pre-analysis.

If successful, these techniques could influence the way we view issues such as mental health, by allowing doctors to gain greater understanding of the mentally ill or people suffering from stress-related disorders. This in itself is an impressive achievement, but the far bigger challenge is how to uncover the actual thoughts associated with that object you see, although some scientists believe that even this will be achievable within a decade. At the same time, this technology is raising serious ethical concerns with the potential for misuse and the fear that one day our private thoughts may become more accessible.

snapshot

While the ability to examine consumers' brain waves to test their reactions to products, services or advertising shows promise, the author argues that care should be taken in the use of neuromarketing research techniques.

Few are more curious

Understanding the complexities of the human brain is perhaps one of our most natural curiosities. But when it comes to gaining a greater apprecia-

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tion of the science behind what drives peoples impulses, few are more curious than marketers and advertisers.

So how is this science being deployed in the marketing industry and is it all hype or can marketers really benefit from this technique?

Neuromarketing, a term coined in 2002, uses various sensor and imaging technologies, such as the fMRI referred to earlier, to measure changes in brain activity as well as in heart and respiratory rates. The subtle change in reactions can tell researchers precisely when a decision is made, what part of the brain is making it and even give clues as to why a particular decision is made.

Author and behavioral economist Dan Ariely has said that these cutting-edge neuro-tools could arm marketers with previously unobtainable information, as consumers themselves may be unaware of how they think, feel, react and, ultimately, consume. He listed food, entertainment, buildings and political candidates as a few examples of the "products" this kind of marketing could apply to.

Although understanding human behavior is fundamental to psychologists, psychiatrists, therapists and other similar professions, it is also the role of the market researcher and therefore it is little wonder that there is an increasing interest in this rapidly-evolving technology that promises so much in terms of the possibility of determining how and when decisions are made.

Until recently, researchers have predominantly relied on respondents to feed back information on how and why they make certain decisions. They've developed various questioning techniques that have provided reasonably reliable projections. But one of the reasons neuromarketing is so attractive is that it addresses, arguably, one of the major weaknesses of market research: identifying why people make certain choices.

In the traditional data analysis method of market surveys, customers may fail to express their real choice, or may even bend the truth, and this can lead to the failure of marketing strategies that do not take these factors into account. The neuromarketing approach of studying brain activity may help overcome this weakness, but it is a complex procedure, requiring many levels of scientific research, study and analysis and is likely to be a highly expensive investment. There is also another major disadvantage in that although this is an exciting and innovative technology with promise, it is still hard to correctly predict the thoughts and behavior of consumers - it's not as if you can carry a 12-ton fMRI scanner around with you while carrying out surveys!

This type of analysis is carried out under laboratory conditions where testing on participants is done using multiple products and the purchasing behavior is analyzed using sophisticated scientific methodology. In addition, we are all different and the conscious or unconscious responses to visual or audio stimuli in a controlled environment could vary significantly. With this approach comes the risk of drawing broad-based conclusions because a handful of customers have shown a similar reaction, which in turn may lead to a more hit-or-miss marketing strategy than would justify the substantial investment.

Robust debate

On the ethical and moral side of the argument there is robust debate on the potential for harm or exploitation and the protection of consumers' control, as neuromarketing research achieves greater effectiveness in understanding - and potentially manipulating - consumer behavior. One could argue that the essential objective of marketing as a discipline is to manipulate consumer behavior, and many of the traditional tools of marketing such as focus groups and surveys rely upon the subtle interpretations of human psychology to arrive at conclusions about consumer behavior. What is still unknown is whether the application of neuromarketing research techniques will allow sufficient understanding of the way in which the brain works to permit the manipulation of desirable behavior in consumers' preferences.

There is also the risk of creating a consumer backlash where the application of neuromarketing research techniques is seen as a shortcut by marketers to "mess with people's heads" instead of developing an appealing and rewarding experience that treats customers as individuals who will make the right decisions for the right reasons.

Bypass focus groups

Either way, market research firms are now beginning to offer their clients brain-based information about consumer preferences, choosing to bypass focus groups and other market research techniques on the premise that directly peering into a consumer's brain while they view products or brands is a much better predictor of behavior. Studies have shown that most buying decisions about products are made at the last minute and understanding why a customer may forgo their favorite brand for a new brand is largely unknown and an area in which neuroscience may help unlock the answer.

Several major companies have already invested significantly in neuromarketing research with some perceived success, including the 2004 Pepsi Challenge study which many claim led to the dramatic increase of interest from marketers in the potential of neuromarketing. In this particular case, 67 people had brain scans while taste-testing Coke and Pepsi and after analysis, it was concluded that, based on the taste test, Pepsi should command 50 percent of the soft-drink market. As Pepsi clearly didn't have that kind of market share, and the results seemed to show that people were choosing Coca-Cola due to branding, etc., it allowed Pepsi to divert funds earmarked to improve taste into improving the Pepsi brand. But again, the question can be asked that, as the fMRI didn't reveal anything new to anybody (the answer was already freely available from the vocal customer base), was it worth the cost?

In the past, the most common and effective way of reaching large market segments was to advertise regularly using a single form of media such as print or television. But today this approach rarely works, as the market has fragmented and a more focused strategy is required using different media depending on the target audience. The hope is that neuromarketing research techniques will provide a new tool to help create a more scientific approach to reaching consumers, by providing a clearer picture of how they will react to various forms of advertising.

As one example, St. Louis-based Emotive Analytics has developed a research technique to uncover the specific feelings potential customers have toward a new product or brand. Its approach is to try to understand the emotional side of consumer behavior by utilizing a combination of neuroscience and psychology. The company's "emotional profiling" technique aims to capture emotions that people are aware of and willing to share and also reveal the subconscious emotions or those that they are specifically trying not to reveal. It attempts to assess both positive and negative feelings, as well as specific feelings that impact purchase decisions such as security, excitement and relaxation. The technique requires a quantitative and qualitative element in order to provide both the metrics that define the brands' emotional profiles as well as what triggers the key emotions found in the quantitative emotional profiles, to tell marketers what to do to activate the desired emotions.

Often been effective

The use of psychological techniques in marketing and advertising has been around for many years, in particular to develop a positive association between a product and service and something desirable. These methods have often been effective and have been achieved without taking away the freedom of choice from the consumer.

As the science of neuromarketing continues to develop, the line between what is acceptable and what isn't in terms of its applications will become thinner and thinner. It is hard to argue against the use of neuromarketing to develop and test strategies that are designed to help overcome significant social issues such as encouraging people to stop smoking or avoid obesity. But its use in advertising campaigns that encourage consumers to buy fast food or alcohol may be far less acceptable.

There is no doubt that neuroscience will be a vital tool in helping to open up a whole new understanding of the human mind. But as it develops, it will be important for organizations to tread carefully in its application to advertising and marketing to avoid public alarm and to allow sound science – rather than promotional hype – to dictate the extent of the regulatory framework constraining its use. | Q

continued from p. 8

survey results show 34 percent made cuts to their marketing and advertising spend last year and 31 percent say that decision had a negative/extremely negative impact on their business results. For more information visit www.fedex.com/office.

Consumers long to show companies their co-creativity

While marketing research traditionally serves to uncover insights for products in the making, co-creation is acknowledged as a more proactive process, integrating consumers into the development process as early as the pre-planning stage, and consumers are anxious to take on this role of developing new products and enhancing existing ones, according to online research community data from Gongos Research, Auburn Hills, Mich.

In an inquiry of 1,000 men and women across the U.S. as to whether they were willing to engage in a company's development process to assist in the creation of products, packaging and the marketing of those products, only 8 percent of consumers were opposed to or not interested in the idea of co-creation. Among six consumer product categories included in the survey, respondents indicated the highest level of interest when it comes to snacks and beverages, with consumer electronics coming in second, followed by health and wellness.

While consumers do not necessarily expect recognition or direct compensation from the company for their ideas, 73 percent of consumers do expect a sample of the product or a cash incentive (71 percent) in exchange for their ideas and/or their time investment. Additionally, 76 percent of consumers are willing to forego acknowledgement or creative license for their ideas, protecting the company from claims based on intellectual property rights or royalty expectations.

"While this is our initial study focused on co-creation, it indicates that there is no real downside to integrating consumers into the full product creation mix, unless of course product designers and marketers see it as a threat to their livelihood, which they should not," says Michael Alioto, vice president, analytics, for Gongos. For more information visit www.gongos.com.

Online not killing the TV ads - yet

While more dollars are moving to digital advertising, corporations continue to spend the majority of their ad budgets on television, as it remained the top advertising choice in first-quarter 2010, with 41.8 percent of ad agencies saying their corporate clients are more focused on TV than any other medium, according to a survey conducted by Chicago business software company Strata. Although while TV remained on top, the number declined 27 percent from first-quarter 2009. Internet/digital advertising continues to increase, with 68 percent reporting that their customers are more focused on digital than they were a year ago.

"To advertisers, TV still matters," says John Shelton, president and CEO of Strata. "But just as radio gave way to television, we can see that TV is slowly giving way to digital. Our survey taps into the perception that digital has its limitations in reach and effectiveness and must still be used with traditional media like TV."

Nearly 40 percent of ad agencies believe it will be at least five years before they anticipate spending more on digital media than traditional media, including broadcast and print. However, just as TV ad share continues to decline, traditional print advertising appears to be declining even further. Nearly two-thirds of respondents say their clients are less focused on print than they were a year ago. Not one agency polled feels it will increase print ad buys.

Other key findings include: 87.5 percent of advertising firms say they are most likely to use Facebook in client campaigns, followed by Twitter (57.1 percent) and YouTube (39.3 percent); 62.5 percent handle SEO/search placements in-house; 32.1 percent of the agencies say that their clients' focus on spot radio will be less than it was a year ago; and 67.9 percent say their digital spend goes toward online display, followed closely by social media and SEO. For more information visit www.gotostrata.com.

A higher class of consumers have adopted couponing

U.S. adults wearing designer duds and diamond studs are on the vanguard of savvy spending, using coupons to fatten their wallets and save big, according to a study conducted by Rochester, N.Y., research company Harris Interactive on behalf of Coupons.com, Mountain View, Calif. Wealthier, more-educated and metropolitan Americans are some of the most likely to be coupon users.

"All sorts of people - including what we call the 'sophisticated couponer' - are proudly aboard the couponing bandwagon," says Steven Boal, CEO of Coupons.com. "We all want the biggest bang for our buck, so the fact that well-heeled, educated and urban shoppers are taking advantage of coupons and searching for them online further illustrates the proliferation of the culture of couponing."

More affluent. Six out of 10 adults with a household income of $100,000+ have redeemed a coupon in the past six months. Additionally, about four in 10 adults in this income bracket have redeemed coupons printed from an online source in the past six months, making them nearly twice as likely to do so as adults with a household income less than $35,000 (21 percent).

More educated. Adults with college degrees are almost twice as likely to have used coupons in the past six months as those who didn't graduate from high school, further dispelling the perceived lowbrow stigma of couponing. In fact, the survey shows that this group of grads is also more likely to make a purchase specifically to redeem a coupon, visit a product's Web site to get a coupon and search for coupons online.

More metropolitan. More than three-fourths of adults who have used coupons in the past six months live in metro areas.

The survey also revealed that just like their female counterparts, men are embracing coupons. Specifically, 51 percent of adult males have used a coupon in the past six months. Not


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only are they using coupons, but over one-third of men responded that they even have a designated place to keep their coupons, and they're just as likely as women to clip and tell: 18 percent of men have blabbed to a friend about a coupon they found online.

Even if economic conditions improve, eight out of 10 adults plan to continue to engage in couponing activities, according to the survey findings. For more information visit www.coupons.com.

Retailers' trimmed assortment defies consumer demand for variety

More than half of U.S. consumers indicate they are likely to shop elsewhere if they notice a reduced product selection, while nearly half of retailers indicate continued plans to decrease assortment, according to a study from New York researcher The Nielsen Company. But how costly is the choice to downsize? Seven percent of personal care product shoppers say that when faced with a shelf that does not contain the item they want, they'll leave the store without buying anything in the category. Often, this translates into the consumer taking their entire shopping basket purchase elsewhere. While 7 percent may seem like a small number, consider that a one-half of one percent decrease in shopper closure across the grocery channel could cost as much as $1.5 billion in sales.

So far, most consumers haven't observed assortment changes, with only 7 percent reporting a noticeable reduction in product variety, and although 42 percent of retailers decreased assortment in 2009 amid considerable industry hype, assortments overall shrunk by only 1 percent. Looking ahead to 2011 however, 40 percent of retailers indicate they'll continue to downsize, with stated targets to cut up to 10 percent of SKUs on the shelf.

Driven in part by the recession, consumer packaged goods retailers are making assortment changes for several reasons. Seventy-five percent of retailers are downsizing their product assortment to improve merchandising opportunities, while 71 percent cite a desire for greater control over inventory. Sixty percent state the moves are made to alleviate shopper confusion, and 52 percent are reducing selection to cut costs and improve profitability. Nearly half of retailers are making more room for store brand products. For more information visit www.nielsen.com.

Restaurant-goers rejoice in menu makeover mandate

Menus around the U.S. are in the process of getting a makeover thanks to the passing of the new health care bill, which will require all restaurants with 20+ locations to include calorie counts on menus, menu boards and drive-thrus beginning in 2011. This is all gravy for restaurant-goers, as more than 60 percent think restaurants should post nutritional information on menus and two in five think federal or local governments should facilitate such actions, according to data from Chicago research company Mintel.

"Menu transparency will allow consumers to have control over their food decisions with a complete understanding of what they're eating," says Eric Giandelone, director, food service research, Mintel.

When going out for dinner, nearly 60 percent of survey respondents say they want something that tastes great and 23 percent claim to want to eat a healthy meal. Only 14 percent of diners say they are never interested in ordering a healthy restaurant meal. Nearly half of survey respondents report eating healthier in restaurants in the past year, although diners have different methods for doing so. Reducing fat (67 percent) leads the way in strategies for adopting healthier eating habits at restaurants, followed by eating more fruits and vegetables (52 percent). Meanwhile, 49 percent of patrons are cutting calories by simply ordering less food.

So while consumers are thrilled to have the information on the menu to help them make healthier decisions, what will this mean for restaurants where a large order of fries or a piece of carrot cake will set you back a hefty 1,500 calories? "From a restaurant's perspective, there is a concern that healthy menu items may not sell, but there is also a danger to having a calorie-laden menu when the calorie count law starts taking effect," says Giandelone. "There may be some initial consumer shock at the calorie counts and chains may have to start listing lower-calorie options or smaller portion sizes to help diffuse this unpleasant surprise." For more information visit www.mintel.com.

Residents turn to Web-based tools for neighborhood news

Americans use a range of approaches to keep informed about what is happening in their neighborhoods, and online activities have been added to the mix. Face-to-face encounters and phone calls remain the most-used methods of interaction with neighbors, but Internet tools are gaining ground in community-oriented communications, according to a poll from the Pew Internet and American Life Project, Washington, D.C.

When asked about online connections to communities and neighbors, 22 percent of all adults signed up to receive alerts about local issues (i.e., traffic, school events, weather warnings, crime alerts, etc.) via e-mail or text messaging, and 20 percent of all adults used digital tools to talk to their neighbors and keep informed about community issues. Additionally, 11 percent reported reading a blog that addresses community issues; 9 percent exchanged e-mails with neighbors about community issues; 5 percent said they belong to a community e-mail listserv; 4 percent communicated with neighbors by text messaging; 4 percent joined a social network site group connected to community issues; and 2 percent followed neighbors using Twitter.

Still, crossing paths on the sidewalk and the neighborhood telephone directory are still major players in keeping neighbors connected: 46 percent of Americans talked face-to-face with neighbors about community issues, and 21 percent discussed community issues over the telephone. For more information visit www.pewinternet.org.

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the control response (i.e., frequency = 0) is derived. For more information visit www.comscore.com.

Ad cataloguing could help understand print ad success drivers

Starch Advertising Research, New York, has begun cataloguing the tens of thousands of print advertisements in its database according to the different elements appearing in the ad (i.e., coupons, recipes, Web addresses, etc.) to help marketers better determine which components of an ad's creative generate ad readership and response. Among the 45+ print ad variables being identified are the use of celebrities; sample/trial offers; scent strips; sweepstakes; telephone numbers; interactive bar codes with which readers can attain more information about the product/service being advertised; recipes; and coupons. In addition, ads with specific words and phrases in their copy, such as "Made in USA," "Limited Offer," "New," "Save" and "Free" are being identified. In 2010, Starch is set to measure consumer ad readership of approximately 144,000 print ads in some 3,150 issues of 186 consumer magazine titles. For more information visit www.starchresearch.com.

3-D tool set to bring another dimension to virtual in-store research

Berkeley, Calif., research company NeuroFocus has launched its N-Matrix 3D System, a virtual-store technology designed to apply knowledge of how the brain perceives and analyzes products, package designs and store settings to create 3-D virtual renderings. Based on neuroscientific research, N-Matrix 3D aims to reproduce entire environments and the individual elements contained within them in detail, incorporating the other visual cues of realistic lighting and perspective. The system also features customizable 3-D environments and touch-sensitive gloves that enable subjects to reach out and pick up products and view them as they would in an actual store or other real-world setting. For more information visit www.neurofocus.com.

Omniture releases tool to unify social media analytics and ad targeting

London business software company Omniture has made available SearchCenter Plus, its social media display advertising solution designed for marketers to measure and manage targeted display advertising buys on Facebook. Features include management templates based on conversion metrics to create automated bid strategies; integration of impression, click and cost data from Facebook with site conversion data; campaign overviews from one interface to manage and report performance results; the ability to organize campaigns, ads or placements within custom groups to report and manage based on business criteria; and the ability to create and manage targeted ad buys in the same application. For more information visit www.omniture.com.

Engager tool hopes to discover link between brand engagement and profit

New York research company Hall & Partners has introduced Engager, a platform intended to link a brand's level of engagement with its profit margins. The Engager framework looks at the dimensions that drive engagement with brands (sensing, knowledge, understanding, integrity, connection, commitment, conviction, participation and advocacy) and aims to identify the link between brand engagement and brand value by conducting research among the general public and business-to-business audiences. Engager then connects these findings to company profits and stock market expectations. The pilot was conducted across 15 categories in the U.K., U.S., Australia and China, with plans to roll out globally. Future plans also include conducting category-specific Engager studies. For more information visit www.hall-and-partners.com.

Arbitron debuts next generation of electronic audience measurement

Columbia, Md., research company Arbitron Inc. has debuted PPM 36 technology, its new generation of audience measurement, designed to serve as a solution to measuring media by extending the Portable People Meter (PPM) technology onto a wireless platform

By migrating to a wireless platform, Arbitron aims to be better equipped to follow the media habits of on-the-go consumers. The updated device design resembles a simple cell phone and is sleeker and smaller than the current meter. The inclusion of cellular wireless technology in the meter eliminates the need for an in-home docking station and a communications hub. The meter is ready out-of-the-box and can be charged with a USB cord. Arbitron can communicate with panelists through a text screen on the meter. It also retains a motion detector to monitor compliance, similar to previous versions of the PPM meter. For more information visit www.arbitron.com.

Harris Interactive introduces Research Lifestreaming

Rochester, N.Y., research company Harris Interactive has launched Research Lifestreaming, a platform intended to present a 360-degree view of individuals by connecting information they post online, survey responses and behavioral data.

Clients are also able to interact with Research Lifestreaming participants, observe their actions, ask questions and listen to conversations. The tool is also designed to serve as a single source, including attitudinal, behavioral, demographic and psychographic information for each respondent.

Specific capabilities include listening to conversations on membership social media networks (with respondents' full consent) and linking panelists' demographic profiles to their social networking posts; observing behavioral patterns of individuals using Harris Interactive's Clickstream and mobile GPS technology; interacting with participants using two-way interaction via group discussions on the Web and asking them one-on-one, in-depth questions about their experiences; and surveying panelists with traditional surveys to gain marketplace and macro-level

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Plus, speakers from Yahoo, Inc., Farmers Insurance, United Healthcare, Harrah's and more. For a complete list of speakers and topics, please visit marketingpower.com/research.

data. For more information visit www.harrisinteractive.com.

QualLink aims to bring qual follow-up to quant studies

20|20 Technology, a division of 20|20 Research Inc., Nashville, Tenn., has debuted QualLink, a tool designed to allow researchers to conduct in-depth qualitative research on selected quantitative survey participants by linking the researcher's online survey software and 20|20's QualBoard (bulletin board) platform. At the conclusion of a researcher's quantitative survey, participants are asked to opt in to a QualBoard session based on their survey responses. Once an invitation is accepted, QualLink will load the participants and their survey data into QualBoard. Access to QualBoard is immediate. For more information visit www.2020research.com.

Briefly

Survey Sampling International, Shelton, Conn., has launched an online consumer panel in New Zealand as part of its OpinionWorld project. For more information visit www.surveysampling.com.

ESOMAR, Amsterdam, the Netherlands, has released its Global Prices Study 2010, a benchmarking study aimed to indicate the relative pricing of research by project type, country and region. The 2010 edition covers seven ad hoc surveys and was based on quotes received from 604 research agencies across 100 countries. All ESOMAR members and opt-ins to ESOMAR updates will receive an e-mail link directing them to the study. The study is available in print and via ESOMAR's online reporting tool. For more information visit www.esomar.org/index.php/global-prices-study-2010-online.html.

Forrester Research Inc., Cambridge, Mass., has released Latin American Technographics, its report on consumer technology adoption and attitudes in Brazil and Mexico. For more information visit www.forrester.com/latamtechno.

Kinesis Survey Technologies LLC, and Austin, Texas, research company, has released a mobile application designed to enable market researchers to monitor survey projects by using touchscreen mobile phones and provide Kinesis Survey users with real-time status of all survey projects and quotas. Users are also able to activate/deactivate surveys, adjust quotas and program e-mail alerts. The application is compatible with Apple iPhone and iPad and any Google Android-based devices. For more information visit www.kinesissurvey.com.

Nimbus, a U.S. technology company, has added brainwave measurement to its integrated virtual shopping and eye-tracking tool, designed to capture each step of the purchase decision and its significance for the final decision. For more information visit www.mynimbusonline.com.

Radius Global Market Research, New York, has introduced Radius OptionDeveloper, a tool intended to allow marketers to anticipate and optimize consumer response to new product and service introductions and existing reconfigurations. OptionDeveloper works by creating alternative product configurations to identify the optimal offer against current and potential competitive scenarios. For more information visit www.radius-global.com.

Copernicus Marketing Consulting and Research, Boston, has released a digitally-enhanced approach to market segmentation designed to help marketers understand the digital behaviors of buyers in their category or industry. For more information visit www.copernicusmarketing.com.

IMS Research, Austin, Texas, has released a report covering results and forecasts for the eBook and iPad markets. For more information visit www.fpdmarketresearch.com.

EDigitalResearch, Hampshire, U.K., has launched HUB, a Web 2.0 interface for insight and analysis and intended for researchers and non-researchers alike. For more information visit www.edigitalresearch.com.

Golden, Colo., research company QualVu has added Russian language translation capabilities as the 12th language in which it conducts online research. For more information visit www.qualvu.com.

Brussels-based IAB Europe, in partnership with Google, Mountain View, Calif., has launched the Consumer Commerce Barometer (CCB), a free online research tool that uses data from Horsham, Pa., research company TNS to provide agencies and advertisers with consumer insights across 27 countries and 36 product categories. The CCB allows marketers to select a country or multiple countries and choose different verticals to evaluate how likely consumers are to research and purchase online. Data will be updated yearly. For more information visit www.consumerbarometer.eu.

Skuuber, a San Diego research company, has created a consumer search engine to accelerate the process of determining a product's market potential at the SKU level. Skuuber is designed to allow clients to assess sales potential from a PC in under 15 minutes. Clients can design, control and launch market analysis on a secure Web site. There is no cost to create an online Skuuber account and clients can begin work immediately. For more information visit www.skuuber.com.

Vancouver, B.C., research company Vision Critical, along with its public affairs division Angus Reid Public Opinion, has released the results of its inaugural ReputationPlus benchmarking study on corporate reputation. The study measures the presence or absence of positive attitudes toward corporations and also probes the negative issues surrounding executive compensation, management's short-term thinking, secrecy, greed and arrogance. For more information visit www.visioncritical.com.

ForeSee Results, an Ann Arbor, Mich., research company, has added a Social Media Value Calculation to its core product offering. The Social Media Value Calculation is designed to use voice of customer methodology to allow companies to explore what influenced a customer's visit to their store, branch, Web site or call center and link it to behavioral data tracking (i.e., how much that customer did or didn't spend). For more information visit www.foreseeresults.com.

ing solutions and platforms offered by Accenture's marketing division Accenture Interactive.

Constant Contact Inc., a Waltham, Mass., e-mail marketing software company, has acquired Menlo Park., Calif., social media e-mail management company **NutshellMail** to enhance its marketing and online survey tools for small businesses and nonprofits.

Columbia, Md., research company **Arbitron Inc.** has acquired the technology portfolio, patents and trade name from San Mateo, Calif., research company **Integrated Media Measurement Inc.** (IMMI). The offering will operate under the name Audience Measurement Technologies Inc. The technologies acquired include IMMI's cell phone-based technology, which is designed to capture consumer cross-platform media usage.

Port Washington, N.Y., research firm **The NPD Group** has acquired **LGI Network**, a Randolph, N.J., research company. The acquisition will combine LGI's retail point-of-sale information on fine watches and branded jewelry and NPD's sales tracking of fashion watches and other accessories. LGI will continue to operate independently for the first two years.

El Segundo, Calif., research company **iSuppli** has acquired **Screen Digest**, a London subsidiary of Adams Media Research, Monterey, Calif. Financial terms of the transaction were not disclosed.

Alliances/strategic partnerships

InsightExpress, a Stamford, Conn., research company, has partnered with Seattle research company **Meteor Solutions** to combine Meteor's influential brand advocates identification with InsightExpress' ad effectiveness measurement through AdInsights, its ad effectiveness solution.

International panel companies **Authentic Response**, New York; **e-Rewards/Research Now**, Dallas; **Global Market Insite Inc.**, Bellevue, Wash.; **Survey Sampling International**, Shelton, Conn.; **Toluna**, Dallas; and **uSamp**, Encino, Calif., have formed a partnership with Westport, Conn., technology development firm **Imperium** to create an Imperium Category Exclusion (ICE) user group - open to any panel services company - intended to improve sample quality. As a respondent takes an ICE client survey, validation data can be used to exclude those who have recently participated in similar surveys, helping to eliminate potential respondent biases.

Insight Marketing Systems, a Melbourne, Australia, research company, and Cambridge, Mass., research company **MarketSight** have formed an alliance to allow research buyers to access and analyze research results online using an integrated Web-based solution developed by the two firms.

Kinesis Survey Technologies LLC, an Austin, Texas, research firm, has made an agreement with Moscow research company **Online Market Intelligence LLC** (OMI) giving OMI exclusive software and hosting reseller rights to all Kinesis products in Russia, Ukraine, Kazakhstan and Belarus.

Association/organization news

The Marketing Research Association (MRA) has announced the recipients of its 2010 volunteer awards. Jane Rosen of Nichols Research was awarded the Honorary Lifetime Membership Award; Marisa Pope of Jackson Associates Research received the Distinguished Service Award; Alice Butler of M/A/R/C Research received the Award of Excellence; and Damon Jones of Burke, Inc. was awarded the Betsy J. Peterson Award. The Southwest Chapter of MRA was given the Chapter of the Year Award.

Awards/rankings

The American Marketing Association, New York, has named **Tom H.C. Anderson**, founder and managing partner of Stamford, Conn., research company Anderson Analytics LLC, to its inaugural Four Under 40 list of marketing research industry leaders.

Research companies **Interviewing Service of America**, New York, and **Phoenix Multicultural**, Los Angeles, together have been awarded the 2010 Asian American Advertising Federation Market Researcher of the Year Award for their work on the second edition of the Asian American Marketing Report.

Carol Hanley of Columbia, Md., research company Arbitron Inc. has been named one of ***Radio Ink***'s 50 Most Influential Women in radio.

New accounts/projects

Rentrak Corporation, a Portland, Ore., research company, has expanded its contract with **Schurz Communications**, Mishawaka, Ind., extending Rentrak's StationView Essentials measurement services to the South Bend, Ind., and Springfield, Mo., markets.

Separately, Rentrak has signed a contract with Dallas-Fort Worth, Texas, ABC affiliate WFAA, to provide StationView Essentials to **The Belo Corp.** television station.

New York researcher **The Nielsen Company** has secured a two-year extension to its contract with **Television Audience Measurement Ireland**, Dublin, through August 2017.

Additionally, Redwood Shores, Calif., ad management firm **Rocket Fuel Inc.** has opted to use aggregated consumer purchase data from Nielsen with the goal of improving the effectiveness of online advertising campaigns. Rocket Fuel will use offline sales data to create model groups of consumers with specific brand affinities to optimize the campaigns to reach look-alikes based on specific brand attributes.

Lanham, Md., software company **Vocus**' public relations management platform has been selected by the **Minnesota Historical Society**, St. Paul, Minn., for media relations, relationship tracking and the monitoring of news and social media.

London research company **Verve**

has been appointed to build, manage and run Bristol, U.K., mobile technology company **Orange**'s Better Together customer panel.

MarketPublishers.com, Limassol, Cyprus, has been authorized to distribute and sell research reports from **Renub Research**, Bangalore, India.

Cincinnati consumer packaged goods company **Procter & Gamble** (P&G) has made Stockholm, Sweden, research company **Tobii Technology Inc.** a preferred partner for scaled virtual market research solutions. The agreement will also enable Tobii to collaborate with P&G on Tobii product innovations. P&G will use Tobii solutions for package and shelf testing globally.

New York research company **Luminosity** has completed its U.S. Boomerang Consumer Study, which focuses on young adults called who have returned home to live with their parents, using the SODA Mobile Access Platform from Vancouver, B.C., research software company **Techneos**.

MRDC Thailand, a division of London research company MRDC, has been appointed a reseller for Oslo, Norway, research software company **Confirmit**.

New York media company **WPP/ Group M** has signed a multiyear contract for Columbia, Md., research company **Arbitron Inc.**'s Portable People Meter and diary radio ratings services across all markets.

Bellevue, Wash., research company **Global Market Insite Inc.** has been selected by **Sony Music UK**, London, to deliver interactive online surveys in conducting artist research.

Dallas research company **e-Rewards Inc.** has adopted San Francisco research company **MarketTools Inc.**'s TrueSample validation platform for e-Rewards' clients. As part of the agreement, e-Rewards will use TrueSample as additional validation of its e-Rewards and Valued Opinions panels in the U.S., U.K., France and Germany.

New companies/new divisions/ relocations/expansions

Vancouver, B.C., research company **Vision Critical** has opened an office in Barcelona, Spain. Eva Laparra has been appointed to lead the office.

Echo Stats Research, Fort Lauderdale, Fla., has launched a new product development division, led by Elizabeth Wallings.

San Francisco research company **EmSense** has opened its European headquarters in central London.

New York research company **WorldOne Inc.** has opened an office in São Paulo, Brazil.

Ipsos, a Paris research company, has launched the Ipsos Social Research Institute to improve its global understanding of social policy and research methods.

New York research company **Hall & Partners** has opened an office in Singapore. The office will be headed up by managing partner Hilary Lee.

The Interactive Advertising Bureau (IAB), New York, has formed the IAB Multicultural Council, which replaces the former IAB Hispanic Committee. The Council has also released its U.S. Latinos Online: A Driving Force report. The report can be found at www.iab.net/us_latinos.

Encino, Calif., research company **uSamp** has opened an office in Trumbull, Conn., and formed a project management team in India.

Research company earnings/ financial news

Rentrak Corporation, Portland, Ore., announced financial results for fiscal fourth-quarter 2010 and the full year ended March 31, 2010. Consolidated revenues increased more than 12 percent to $25 million for the fourth quarter, driven primarily by strong growth in the company's Advanced Media Information (AMI) division. Gross margin improved to $10.4 million; gross margin in the company's AMI division totaled 73 percent of AMI revenues. Operating expenses were $10.6 million. Operating loss was $0.2 million versus operating income of $1.8 million. Net income totaled $0.2 million, or $0.02 per diluted share.

Consolidated revenues were $91.1 million for fiscal 2010 versus $95 million for fiscal 2009. AMI revenues rose 57 percent to $19.8 million from $12.6 million for fiscal 2009. Operating loss was $0.9 million, compared with operating income of $5.2 million in 2009. Net income was $0.6 million, or $0.05 per diluted share.

Intel Capital, Santa Clara, Calif., invested $10 million in **True ROI Accountability for Media**, New York. The investment is part of an $18.2 million Series C round lead by Intel Capital, which includes participation from existing investors Arbitron Inc., Columbia, Md., and WPP, Dublin, Ireland.

Nielsen Holdings BV, New York, has announced plans to sell up to $1.75 billion in shares in an initial public offering, according to a June 3, 2010, report in *The Wall Street Journal*. Nielsen plans to use proceeds to repay debt and for other purposes, according to its filing with the Securities and Exchange Commission.

WPP Digital, New York, has made a strategic investment in **Ace Metrix**, Los Angeles. In connection with the investment, WPP and Ace Metrix will partner to provide marketers with access to in-market television advertising performance metrics.

Cardinal Value Equity Partners, Greenwich, Conn., sold nearly 2 million shares (over half of its holdings) of **Infogroup**, Omaha, Neb. Cardinal was one of the investors that filed a shareholder lawsuit questioning the way Infogroup founder Vinod Gupta used company money to support his lifestyle.

USamp, Encinco, Calif., closed a $10 million Series C round of financing, lead by **OpenView Venture Partners**, Boston.

Names of Note

continued from p. 10

Martin Attwood senior account director. Attwood will be based in Melbourne, Australia.

Separately, Millward Brown has appointed **Tim Wragg** as CEO, Europe. Supporting Wragg on the European board will be **Juan Ferrer-Vidal**, COO; **Krzysztof Kruszewski**, CEO, developing European markets; **Cath Booth**, chief client officer; **Elizabeth Brownhill**, CFO; **Dan White**, CMO; and **Paul Kessels**, director, operations.

Kadee Fabyan-Dew has joined *G & S Research*, Indianapolis, as senior project manager and moderator. The company has also promoted **Juston Miller** to programming supervisor.

San Francisco research company *MarketTools Inc.* has named **Ben Langleben** strategic client director, U.K.

San Francisco research company *Solarbuzz* has hired **Finlay Colville** as senior analyst.

Insight Research Group, London, has promoted **Lee Gazey** to manager, commercial development. The company has also appointed **Emma Stewart** and **Jenny Service** as senior research executive and **Siobhan Connolly** and **Anthony Rowbottom** research executive.

San Francisco research company *EmSense* has hired **Sue Nosworthy** as senior vice president and director, European research; and **Maria Domoslawska** as vice president, digital and media research. Nosworthy and Domoslawska will be based at the company's European headquarters in London.

Gareth Thomas has been named director, international development, at *Doctors.net.uk*, an Oxford, U.K., online network of medical professionals. Research will be among his responsibilities.

Karen Fraser has been appointed to lead the research division of *The Advertising Association*, London.

Colm Mallon has been appointed territory manager, Ireland, of *GfK Retail and Technology*, a Nuremberg, Germany, research company.

Bazaarvoice, an Austin, Texas, research company, has hired **Mark Riggs** as chief client officer.

Rebekkah Carney has joined the Fort Washington, Pa., office of London research company *Double Helix* as vice president, medtech prime market research.

Vancouver, B.C., research company *Vision Critical* has named **Eva Laparra** senior vice president, European operations and managing director of the company's Barcelona, Spain, office.

index of advertisers

calendar of events

Featured Event

Globalpark will host a Webinar, themed "Marrying Online and Offline Activities to Engage Consumers, Build Brand and Capture Insights," on **September 22** at 11 a.m. EDT. For more information visit www.globalpark.com.

The 2010 Ethnographic Praxis in Industry Conference will be held on **August 29-September 1** at the Midtown Conference Center in Tokyo. For more information visit www.epic2010.com.

The Australian Market and Social Research Society will hold its annual national conference, themed "Eyes Wide Open," on **September 9-10** at the Melbourne Convention and Exhibition Center in Melbourne, Australia. For more information visit www.mrsa.com.au.

ESOMAR will hold its annual congress, themed "Odyssey 2010 - The Changing Face of Market Research," on **September 12-15** in Athens, Greece. For more information visit www.esomar.org.

DMG World Media will present the ad:tech London exhibition conference, themed "Think Strategy, Not Just Technology!" on **September 21-22** at National Hall, Olympia, in London. For more information visit www.ad-tech.com/london/adtech_london.aspx.

The Mystery Shopping Providers Association will hold its annual conference on **September 21-23** at the Hotel InterContinental in Chicago. For more information visit www.mysteryshop.org.

The American Marketing Association will hold its annual marketing research conference on **September 26-29** at the Hilton Atlanta. For more information visit www.marketingpower.com.

Sawtooth Software will hold its annual research conference on **October 6-8** at the The Newport Beach Marriott in Newport Beach, Calif. For more information visit www.sawtoothsoftware.com.

CASRO will hold its annual conference on **October 11-14** at the Four Seasons Resort Aviara in North San Diego, Calif. For more information visit www.casro.org.

The Qualitative Research Consultants Association will hold its annual conference on **October 13-15** in Philadelphia. For more information visit www.qrca.org.

ESOMAR will hold its annual online research conference, themed "E-Universe: The Power of Listening," on **October 17-19** in Berlin, Germany. For more information visit www.esomar.org.

ESOMAR will hold WM3, a conference on worldwide multimedia measurement, on **October 19-21** in Berlin, Germany. For more information visit www.esomar.org.

The Life Insurance and Market Research Association will hold its annual meeting on **October 24-26** at Gaylord National Hotel and Convention Center on the Potomac in Maryland/Washington, D.C. For more information visit www.limra.com.

PMRG will hold its annual meeting of The PMRG Institute on **October 24-26** at the Westin Boston Waterfront. For more information visit www.pmrg.org.

Geoscape will hold its annual multicultural marketing summit on **October 27-29** in Miami. For more information visit www.geoscape.com/welcome-letter.aspx.

The ARF will hold its 2010 ARF Industry Leader Forum, themed "Discovering Consumer Insights," on **October 28** at the New York Athletic Club. For more information visit www.thearf.org.

The Marketing Research Association will hold its First Outlook and Expo conference on **November 2-4** at the Walt Disney World Swan in Orlando, Fla. For more information visit www.mra-net.org.

IIR will hold its annual conference, "The Market Research Event 2010," on **November 8-10** at the Hilton Bayfront in San Diego. Use code TMRE10QUIRK when registering to save 20 percent off standard rates. For more information visit www.iirusa.com.

The Marketing Research Association will hold its annual fall education conference on **November 10-12** at Walt Disney World in Orlando, Fla. For more information visit www.mra-net.org.

ESOMAR will hold its 2010 conference on innovation on **November 14-16** in Barcelona, Spain. For more information visit www.esomar.org.

The Society of Insurance Research will hold its annual conference and exhibit fair on **November 14-17** in Jacksonville, Fla. For more information visit www.sirnet.org.

ESOMAR will hold its qualitative research conference, themed "Foresight on Moods and Thoughts," on **November 16-18** in Barcelona, Spain. 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.

trade talk

By Joseph Rydholm
Quirk's editor

Book helps make sense of measuring social media

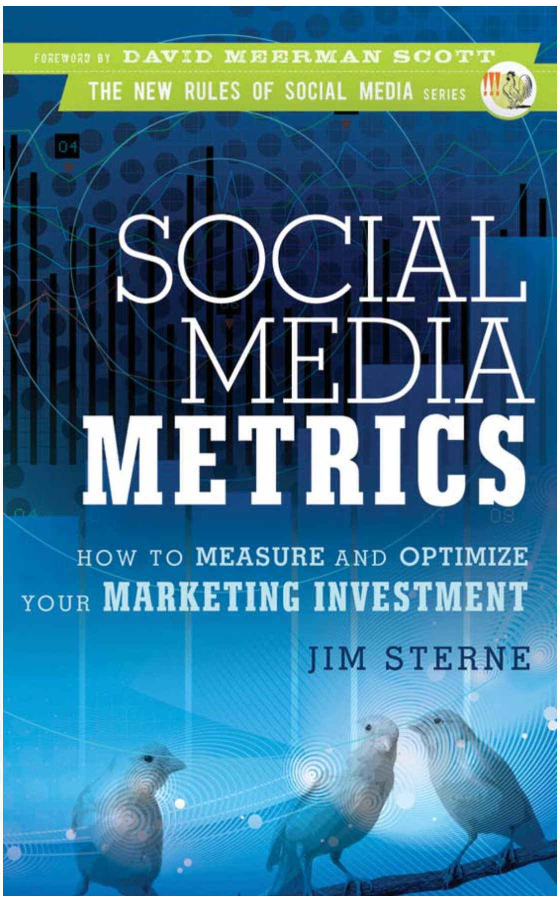
Elsewhere in this month's issue you'll find a host of articles on conducting marketing research using social media. Along with using research to monitor what the market is saying about them in blog posts, tweets and user-generated product reviews, many companies are also examining how they can use social media outlets to tell their stories, sell their wares and forge relationships with consumers.

There's no doubt that, done right, Web-based outreach can build brands and enhance goodwill, but can you put a dollar value on those things? Does the cost of maintaining a blog or a Facebook fan page add to the bottom line? Is all the effort really worth it?

The search for answers to those types of questions should begin with a reading of Jim Sterne's new book *Social Media Metrics*.

There are no single answers here, no "here is what you should do" that will apply to every situation - the Web and its data sources are obviously too vast for that, as are the differences between each marketer or researcher's individual situations.

But the book excels as a compact, readable and good-humored assemblage of thoughts, strategies and viewpoints from a host of sources on how to think about and approach the analysis and measurement of social media data. Many of the sources and sites that provide tools or metrics will be familiar to social media measurement veterans but for those just getting their feet wet, Sterne has packaged a lot of information in a way that helps you get a quick education on this fast-changing sphere.



Have a plan

One of the messages he repeatedly drives home about measuring social media ROI also applies to marketing research: know why you want to know what you're trying to measure, and have a plan before you start, one that explains what you'll do with the information.

He writes, "… you must first be certain that you know what you are trying to find out (what problem you are solving for) and then be certain that you and those around you agree on your definitions of the terms you use to describe and solve that problem."

To that end, his chapters are helpfully-titled and sequentially-organized. For example, in order to sell someone something, you have to get them to notice you (chapter two), then determine how they feel about you (chapter three), how emotionally connected they are to you (chapter four) and what it takes to get them to act (chapter five). Then you need to figure out how to listen to what people are saying about you on social media (chapter six) and use your investments in social media to drive business outcomes (chapter seven).

You'll want to read the book with a computer nearby, as nearly every page contains URLs for source material. David Berkowitz's "100 Ways to Measure Social Media" is reprinted, as are helpful things like the eight stages of listening (complete with the resources needed and likely impacts) and interesting case studies on Salesforce.com and its use of a range of social media measurement approaches and IdeaStorm, Dell's foray into crowdsourcing.

Comforting breadth

No single book could cover the myriad nuances of every form – the likes of Twitter, blogs, Facebook, etc., each warrant their own volumes – but Sterne gives a concise (240-page) and thorough overview of the social media sphere that has a comforting breadth.

True, after completing it, you may be amazed at all that you need to know and all that there is to know but you'll no doubt have a firmer grasp of the big picture and the experts and entities at the forefront of social media measurement. | Q

Social Media Metrics (240 pages; $24.95), by Jim Sterne, is published by John Wiley and Sons (www.wiley.com).

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Coming in the October issue...

What drives net promoter score?

Three authors from Observant LLC offer a structured approach for qualitative verbatim analysis to help determine customer loyalty for a client in the consumer electronics industry.

Testing a new fraud prevention product

PSCU Financial Services used quantitative, qualitative and in-market research to fine-tune its CardLock fraud prevention service.

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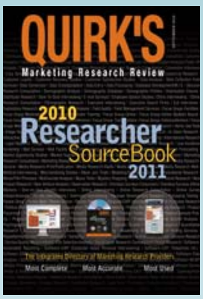

The SourceBook hits desks in September

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 7,100 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!

Want more War Stories?

Disrobing research respondents, barroom-brawls in focus groups and interviews with precocious kids - Quirk's War Stories column has it all. Quirk's twice-monthly e-newsletter always includes a few War Stories - true-life, humorous anecdotes of life in the research trenches compiled by Art Shulman - and our click counts tell us that our readers are loving them! If you're interested in reading more tales of research-related wackiness, check out quirks.com/articles and select War Stories in the "Article Type" pull-down menu. Additionally, if you have your own (or a colleague's) story to tell, send it on to Art at artshulman@aol.com.

cover-to-cover

Facts, figures and insights from this month's issue

> Internet users creating UGC rarely limit themselves to a single outlet (e.g., forum, blog, Facebook, etc.). Thus, search results often contain a single person's thoughts expressed on multiple sites. Unless the wording used on each site is identical, the database cannot identify the person as the same user and remove duplicates. *(page 27)*

> It takes only one thoughtful or personal disclosure to shed light on an unmet need or new opportunity. Your most passionate, articulate customer may not be the most typical one but may well be the most valuable one. *(page 39)*

> Verbatims on microblogs generally have a more negative tone than those on blogs, perhaps because microblogs are more likely to reflect off-the-cuff opinions while blogs are generally more thought-out and rehearsed. *(page 44)*

> There is robust debate on the potential for harm and exploitation and the protection of consumers' control, as neuromarketing research achieves greater effectiveness in understanding - and potentially manipulating - consumer behavior. *(page 60)*

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To enter, send an e-mail to contest@quirks.com with your complete contact information. Please include "Q Research Contest" in the subject line. Deadline to enter is August 31, 2010. The winner will be selected at random and announced in the October issue of *Quirk's*.

Congratulations to June's winners: Brett Waters, AAA Auto Club South; William Muckelroy, Lynx Research Consulting; Ruth Waters, ConAgra Foods Inc.; Maureen E. Fyke, Fisher-Price Inc.; and John Herman. Winners received a copy of Kathryn Korostoff's book *How to Hire & Manage Market Research Agencies.*