Tips on improving your trackers

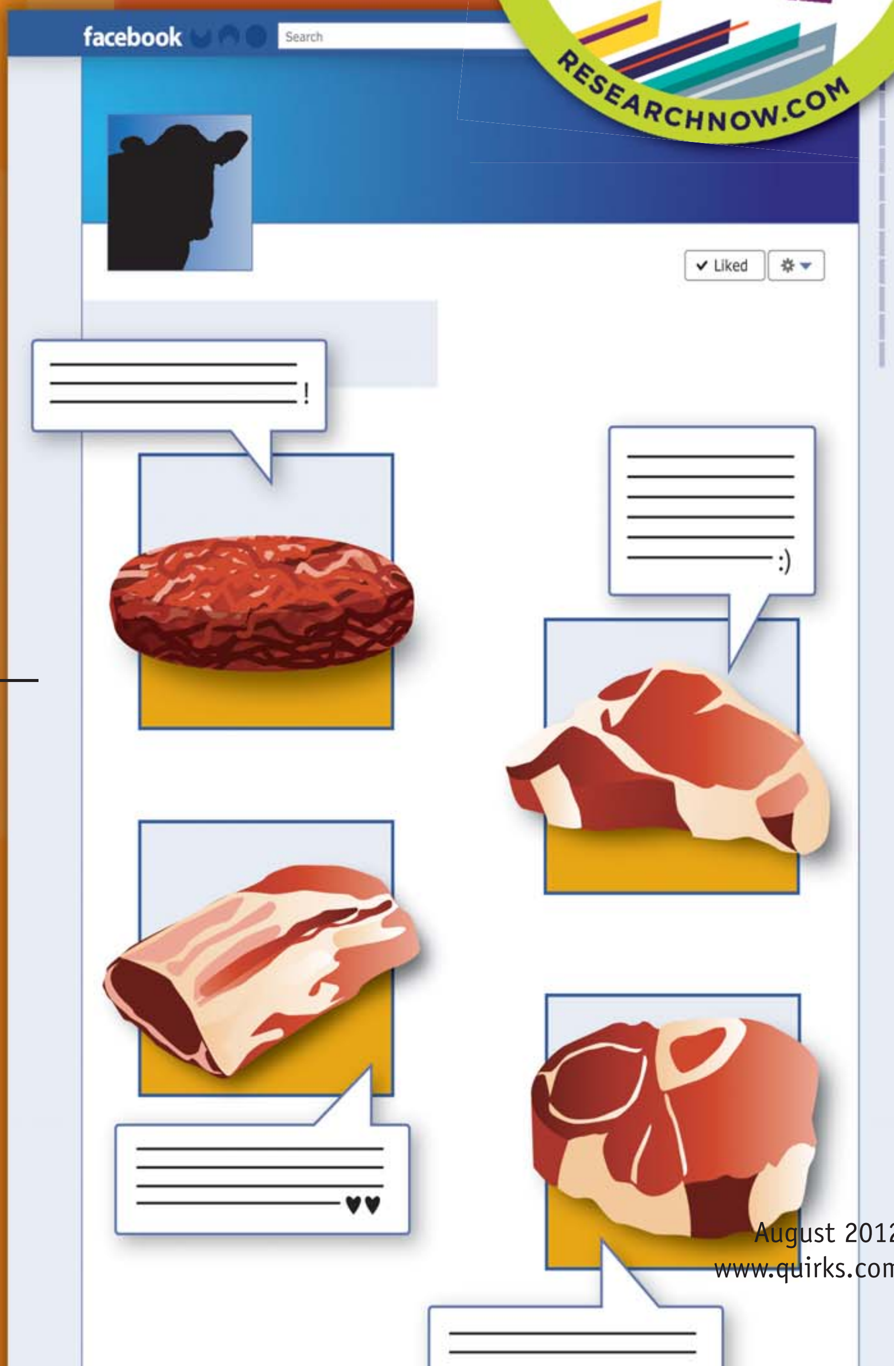
Research-company perks that work

Is MR no longer the customer's voice?

QUIRK'S
Marketing Research Review

Research on the menu

Facebook serves up Millennials for study on beef consumption



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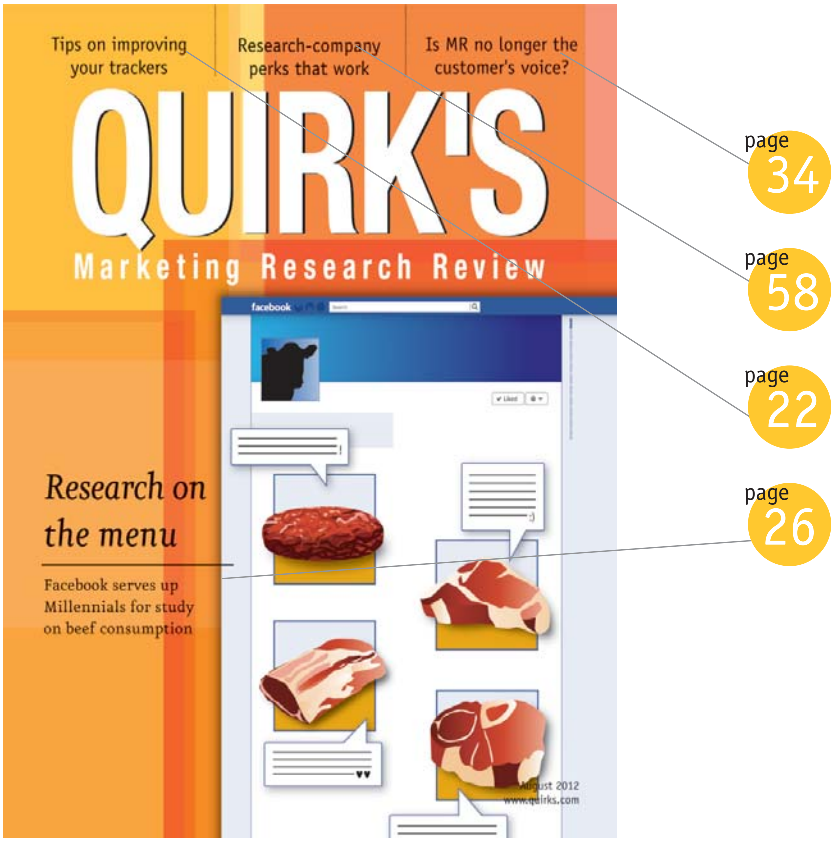

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COLUMNS

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••• online, e-newsletter and blog highlights

••• social media

Quirk's adds a LinkedIn group into the mix!

Last month Quirk's acquired and rebranded one of the largest LinkedIn groups (over 26,000 members!) devoted to marketing research. The Marketing Research & Insights Group, as it is now officially known, not only expands our audience but provides our current subscribers a spam-free space to network with other researchers and exchange thoughts, ideas and opinions. We hope to bring structure and accountability to the group (something lacking in the social media sphere!) while still maintaining a free exchange of ideas.

We encourage you to join the group if you aren't already a member. We want our readers to get involved and stay involved! We only ask that you keep all posts related to marketing research and insights. Off-topic or purely promotional posts will not be allowed.

To make this the most active and informative marketing research group on LinkedIn, we have established a few guidelines about where and what to post.

Discussion tab: Topics on marketing research and insight methodologies and techniques. This is a great place to ask for advice or ask questions on conducting research. By responding to posts, it's also a great way to show the industry that you are a thought leader.

Jobs/Jobs discussion tab: This is the place to post marketing research-related job openings or to discuss the marketing research and insights job function. Of course we still recommend you post your jobs on Quirks.com as well!

Promotions tab: You can use this space to announce the release new services; personnel changes; office openings; or upcoming educational Webinars or events. Any posts that do not meet these requirements will not be accepted.

We hope you will join and participate in this great community of researchers. We look forward to engaging with you in The Marketing Research & Insights Group.

// E-newsworthy

Research vendor salary survey: Adjusting to the new normal
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The five questions to ask applicants in an interview
researchcareersblog.com/2012/03/20

In 2012, will social media data analysis still give us fits?
researchcareersblog.com/2012/02/22

••• consumer psychology

For sharing programs, there is such a thing as 'too popular'

Businesses that want to market commercial sharing programs – in which consumers pay for shared use of products like cars or bicycles – should focus on cost effectiveness and product availability rather than popularity or environmental benefits, according to research by the University of Pittsburgh.

Authored by Cait Poynor Lamberton, Joseph M. Katz and Randall L. Rose, the study examined the likelihood of consumers using companies that shared cars, cell phone minutes and bicycles.

In the study, a fictional car-sharing service was presented to an online panel of 300+ licensed drivers. Users were asked whether they would sign up for the car-share program; how likely they would be to use the car; and whether they were concerned the car would be available when they needed it. They also answered questions about the social acceptance and environmental benefits of sharing and whether they had any antipathy toward the industry in question.

Consumers that stand to save money participating in a car-sharing program were more likely to choose the service than those who would not save money. However, beyond cost savings, consumers were most concerned with a car being available when they needed it, suggesting that a program that seems too popular would deter potential users, causing them to doubt the availability of resources. This consideration was a greater contributor to the likelihood that they would participate in a sharing program than almost any other factor.

"Consumers know if companies are advertising that everyone is using their services, there may not be a product available for them when they want to use it," said Lamberton. "There is a fine line between saying something is popular and not letting consumers feel as though they are losing access."

quirks.com/articles ID 20120801

••• customer experience

Please hold? I don't think so

Consumers are 58 percent more likely to make a purchase when brands respond to customer calls in under a minute and 73 percent more likely to recommend highly-responsive brands to other consumers, according to research from Ifbyphone, a marketing automation company.

Study participants were asked a series of questions related to company response times. Answers were based on participants' most recent experiences calling a brand under two circumstances: to make a new purchase or as an existing customer. Sales calls were answered faster than existing customer calls, as half of all sales calls were answered in less than 60 seconds, while 78 percent of existing customers waited longer than a minute to reach a real person.

Four out of five respondents indicated a desire to abandon a brand due to poor response times but nearly half reported they couldn't walk away for contractual or other reasons.

While existing customers may be stuck doing business with less-responsive brands, successful companies don't neglect their customers. According to the survey, customers are 69 percent more likely to refer a brand when that brand responds in less than a minute.

By Joseph Rydholm, Quirk's Editor

Your turn, vendors

©Clare Pix Photography www.clarepix.com

Joe Rydholm can be reached at joe@quirks.com

In my column last month I looked at some responses to the open-ended questions we included with our annual corporate researcher salary survey. We asked a similar set of questions for the companion research vendor salary survey (check out Emily Goon's recap at http://tinyurl.com/bllarsb), inquiring about the skill set needed by researchers in the coming years and what they would like to know from their peers at other companies.

On the skills question, while they mentioned many of the same themes as their corporate counterparts – flexibility; experience with and openness to incorporating technology into the research process; ability to transform data into understandable, strategically-relevant insights – they also put a vendor-specific twist on things:

"E-recruiting is becoming more and more crucial – using social media to locate qualified respondents. It will be more and more important to have skills using social media."

"Mobile and tab compatibility; competitive recruitment pricing and tactics; niche recruitment; international recruitment."

"More qualitative interviewers who think past a screener to ensure client is getting exact target market. Deeply trained interviewers must know to ask additional questions that clients don't know to ask. We've begun grooming and training ours for more understanding of consumers from an anthropological standpoint."

"For full-service researchers, we must understand what our clients need in order to make their product development and marketing decisions, and give them the best advice on what research to do, and its implications for their business."

(Alas, I'm sorry to tell one beleaguered respondent that one skill is probably unattainable no matter how hard they try: *"The ability to accept mountains of sloppy, dirty data that's delivered at the speed of light."*)

Expressed curiosity

We also asked them what questions they would ask their peers, if given the chance, about the current state of the industry. Like those on the corporate side, they expressed curiosity about work-life balance and inquired about some of the particular aspects of their peers' job duties. Many of the other questions had a vendor-specific feel:

"Are they happy with the changes in qualitative or not? Do they believe the changes in the field have enriched our understanding of people? How can we objectively assess the value of new methodologies beyond self-interested claims of suppliers?"

"What's the best source for generating new business?"

"What are real quality control techniques used in fieldwork departments?"

"How much do they invest in IT (hardware and software) each year? How much do they invest in marketing each year?"

"In what ways are marketing research companies working to align their project management and data processing teams? (Communication and understanding between the departments can reduce errors and increase accurate timeline predictions.)"

Across the industry

And, as with the skill-set questions, some of the questions are applicable across the industry (sorry about our role in the last one):

"What do their project timelines look like, because ours are ridiculous."

"How can you present Internet-based questionnaire results with a straight face?"

"What type of research have you found is most useful to your clients, as well as makes your company successful?"

"What about your job do you enjoy the most? What techniques and skills do you rely most on? Which techniques and skills do you wish you used more?"

"Truthfully, between all the relevant LinkedIn groups' e-mails, Quirk's itself, other research journals and magazines, plus any blogs, etc., they could benefit from, how do they keep up with all the reading that can be done to remain professionally competent?"

quirks.com/articles
ID 20120802

IN FOCUS

••• a digest of survey findings and new tools for researchers

Q // Survey Monitor

••• retailing

Consistency across channels

Integrated retail experience could improve customer loyalty

Over 80 percent of U.S consumers are more likely to become loyal customers to retailers that provide an integrated experience across channels, according to a study from hybris, a Munich, Germany, commerce and communications software provider, that examined U.S. consumer behaviors and expectations for a multichannel shopping experience.

The importance of online and mobile strategies continues to increase with more than one-third of consumers reporting that they make more purchases online than in-store. Looking ahead to the 2012 retail holiday season, 46 percent of consumers plan to increase online shopping during the holidays but only 8 percent will increase in-store shopping.

Even while shopping in a brick-and-mortar store, consumers continue to turn to digital channels, with 19 percent reporting that they browse their mobile device while in-store. The vast majority do so to compare prices (66 percent), while others compare product choices (27 percent) and read online recommendations (7 percent).

When asked to rank desired features in a multichannel retail experience, 45 percent indicated in-store pickup options for online purchases were most important and 28 percent of consumers selected in-store returns for online purchases as most valuable.

These features also build loyalty. Eighty-two percent of respondents would shop again at a retailer who accepted in-store returns for online purchases and 73 percent were more likely to become a repeat customer if a store offers in-store pickup.

The survey findings also revealed a gap between consumer expectations and current retail offerings, especially for mobile. Consumers would be more likely to return to stores that distributed personalized offers (40 percent) or in-store mobile promotions (42 percent) but nearly half of consumers said retailers do not currently deliver these capabilities.

Additionally, the study identified specific factors that can potentially impact the likelihood of a consumer following through with a purchase online. The most important factors for following through with an online purchase: easy navigation (59 percent); simple checkout process (57 percent); and presence of product images (42 percent). The most important factors that might deter an online purchase: shipping costs (47 percent); out-of-stock items (28 percent); and lack of product images (23 percent). www.hybris.com

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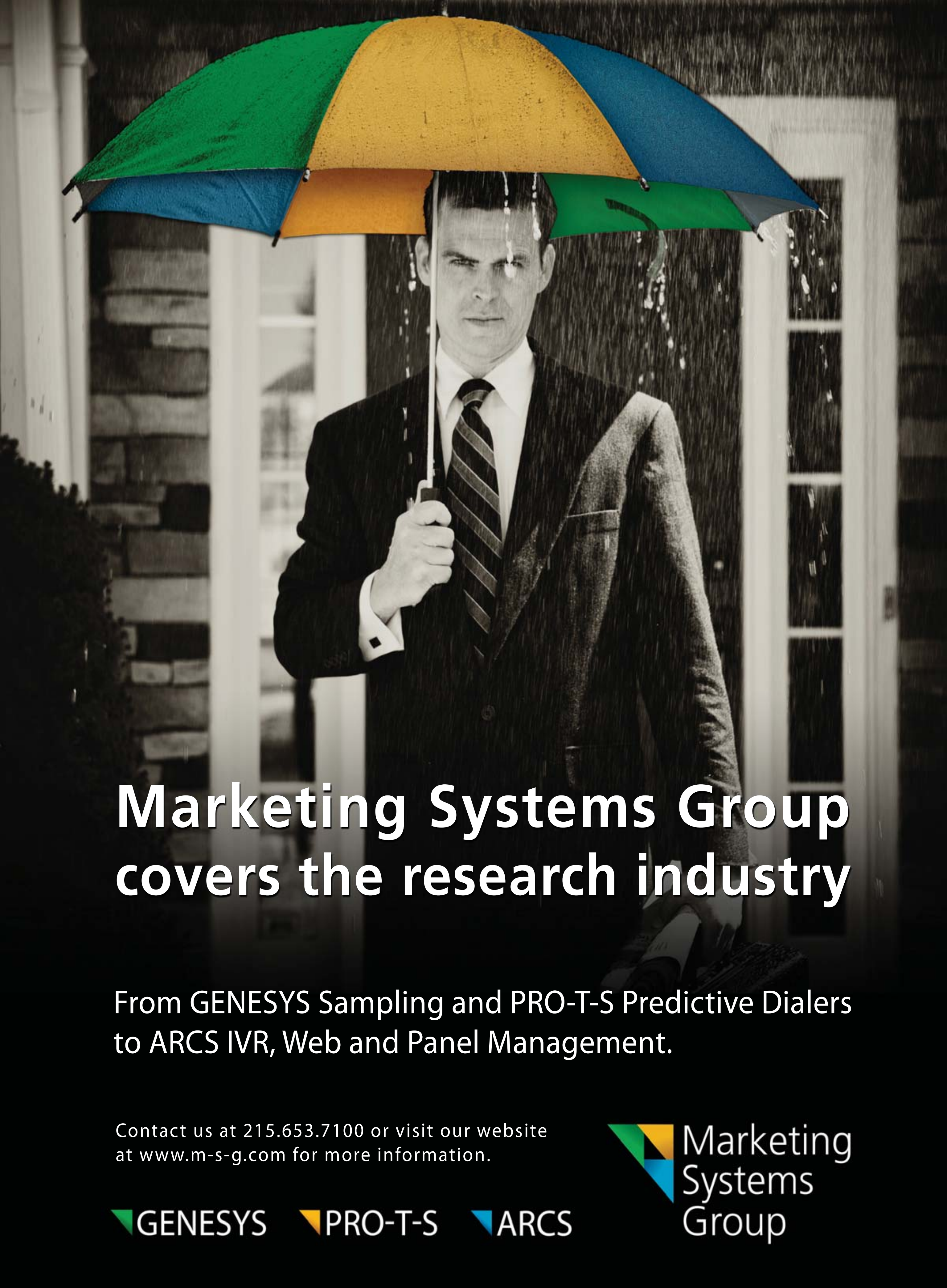
••• financial services

Haves vs. have-nots

Comparing credit card usage of the struggling and the stable

Are some people going into debt to buy gas as fuel prices rise? Are some people trying to dig out from under a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to ARCS IVR, Web and Panel Management.
Contact us at 215.653.7100 or visit our website
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GENESYS
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mountain of credit card debt with a minimum-payment teaspoon? How are people who are struggling financially using their credit cards and paying their bills? To better understand the national economic news and credit card statistics, CreditDonkey, a Los Angeles credit card comparison and financial education Web site, surveyed consumers to consider the width of the divide between people who say they are struggling to pay their bills each month and those who say they are not.

To measure the amount of financial distress each person was feeling, the survey asked, "Thinking about all your bills, do you have to choose which bills to pay and which bills to put off each month?" Those who answered "always" or "sometimes" were considered to be struggling financially and those who responded "rarely" or "never" were considered financially stable.

Forty-five percent of those surveyed who say gasoline is the most frequent purchase they make with their credit cards also say they pay the minimum amount due on their statements or just a little more each month. These credit card users are at risk of falling into debt for a consumable and necessary item, which is a worst-case personal economic scenario that will get worse as fuel prices skyrocket.

People surveyed who say they are financially distressed are among the most likely to pay the minimum amount due or a little more (61.7 percent distressed vs. 38.3 percent of those not distressed). Conversely, 85.7 percent of those considered financially stable pay off their balance in full each month, compared to 14.3 percent of those distressed. Although it is impossible to know from this data whether paying the minimum amount is the reason people are struggling or whether they pay the minimum because they are struggling, it is likely that paying the minimum amount is closely connected to their financial situation as well as their knowledge – or lack thereof – about the drawbacks of paying such a small amount each month.

Interestingly, 61.2 percent of the financially distressed report that they do not use a credit card, compared to 62.2 percent of the financially stable who do. www.creditdonkey.com

••• grocery/supermarket research

Price isn't everything

ALDI a low-price leader but not a favorite

Discount grocer ALDI was recognized as the nation's low-price grocery leader for the second year in a row, according to a survey conducted by Market Force Information Inc., a Boulder, Colo., research company. When asked to rank the top eight grocers offering low prices, consumers ranked ALDI ahead of competitors such as Walmart, Costco, Publix, Kroger, Safeway and ShopRite. However, the cheapest doesn't mean the best: Giant Food is consumers' favorite grocer, followed closely by ShopRite and then Walmart.

When consumers were asked which grocery store captures the most of their dollars, eight grocers earned more than 2 percent of the vote, with Walmart, Kroger and Publix Super Markets landing in the top three spots. However, since grocery retailers have thousands of locations and others have a fraction of that, Market Force indexed the results by store count in order to get a more accurate representation of the results. This analysis moved Giant Food to the No. 1 position, followed by ShopRite and then Walmart, Publix, Costco, Kroger, ALDI and Safeway. This is a slight shift from 2011, when Kroger and ShopRite held the top two spots.

The survey also asked consumers to rank the top eight grocery retailers on a number of attributes such as pricing; cleanliness; customer service; meat and produce quality; atmosphere; and sustainable practices. Publix fared well when it came to these attributes, scoring highest among the pack for inviting atmosphere, courteous staff, quality produce and cleanliness. Walmart ranked highest for being a one-stop shopping destination but was last in providing high-quality meat and produce and having a courteous staff. The top wallet-share winners – Giant Food and ShopRite – scored middle-of-the-road in most of the attributes. There was also very little variation in categories such as private-label brands, which may be an area for grocers to differentiate.

Location and price are the main reasons consumers shop where they do but they're not the only driving factors. Operational excellence also plays a large role. When it comes to the food itself, high-quality produce is more important to shoppers than high-quality meat. And, despite a recent industry-wide emphasis on sustainability, it was only significant to 7 percent of respondents.

The good news for grocers is that most shoppers said they were satisfied with their recent grocery shopping experiences. In fact, 88 percent said they were either somewhat or very satisfied and a mere 12 percent of consumers said they were either neutral, dissatisfied or not at all satisfied. For those who reported dissatisfaction, the most common reason given was long checkout wait times (52 percent). Second on the list was the inability to find a desired item (48 percent), poor cashier service was third (39 percent) and produce quality fourth (29 percent).

Does satisfaction lead to recommendation? The data points to yes. Of those who rated their experience a 5 on a five-point scale, 70 percent said they were highly likely to recommend the grocery store to another person.

For those who rated it 4 points, only 11 percent said they were highly likely to recommend. That's a sixfold difference in the propensity to recommend, showing the importance of creating an experience that delights consumers and keeps them coming back.
www.marketforce.com

••• customer experience

Heard, understood, acknowledged

Consumers demand dialogue with companies online

With an ever-growing number of publicly-accessible online communication choices available, consumers overwhelmingly want their voices to be heard by companies via the Web. Consumers expect companies to be listening and 85 percent are very happy when businesses respond to their public comments in online forums and social media venues, according to a study from Maritz Research Consumer Preferences, St. Louis. That sentiment is amplified among younger consumers.

Consumers were asked about their use of direct feedback methods, such as sending an e-mail, placing a telephone call and writing a letter, and online public methods, such as using Facebook, Twitter, Google+ and LinkedIn. Customers who received a response from a public comment were overwhelmingly positive about the fact that the company responded, regardless of how well the company actually handled the issue. With 27 percent delighted with a response to their public feedback, compared to only 6 percent for a response to their direct feedback, they were more likely to be happy about companies responding to public comments than direct feedback. Only 2 percent of respondents indicated they were unhappy with the response they received to public comments, demonstrating the acceptance of Web-based public feedback methods.

Looking to the future of customer contact, preferred consumer contact methods are closely related to age. While all age groups still prefer direct feedback methods, young-adult consumers increasingly choose online public feedback over direct, with 33 percent of the youngest consumer age group (18-to-24-year-olds) preferring public feedback methods and 28 percent of those specifically favoring Facebook.
www.maritzresearch.com

••• religion

Worship and the Web

Church Web sites attract members and non-members alike

Twelve percent of all American adults have visited the Web site of a church or other local place of worship within the past 30 days, according to a study from Grey Matter Research, Phoenix. Going back to the last six months, the proportion nearly doubles to 22 percent.

Among Americans who are online, 15 percent have visited the Web site of a local place of worship in the last 30 days; 28 percent have done so within the past six months; and 36 percent have done so within the last year.

But who are these people and what are they doing on these Web sites? There are basically three types of visitors to church Web sites (note: "church" refers to any local place of worship of any religion). The first type is people who are already attending that church. Among online Americans who attend worship services once a month or more, 28 percent have visited their own congregation's Web site in the last 30 days; 44 percent have done so in the past six months; 57 percent have done so in the past year; and a total of 68 percent have done so at some point while attending that place of worship. Thirty-two percent of churchgoers who use the Internet have never visited their own congregation's Web site (or their church does not have a Web site).

The second type of visitor to church Web sites is people who regularly attend worship services but at a different congregation. Among online Americans who attend worship services regularly, 13 percent in the past 30 days have visited the Web site of a congregation other than the one they attend. A total of 27 percent have done this in the past six months and 37 percent in the past year.

The third type of Web site visitor is people who do not attend worship services regularly at any congregation. Among these people, 2 percent who are online have visited the Web site of a place of worship in the last 30 days; 10 percent have done so in the past six months; and 16 percent have done so in the past year.

With all of these people visiting congregational Web sites, what are they doing there? Most commonly, site visitors are checking to see the times of services (43 percent). Other common activities include checking what activities are offered (e.g., youth groups, studies, events – 29 percent); looking for a map or directions to the church's location (28 percent); watching streaming video (26 percent); and listening to streaming audio (26 percent).

Somewhat less-common activities include checking to see what the church's religious beliefs are (22 percent); requesting prayer (18 percent); downloading a podcast (15 percent); checking what denomination or group they belong to (15 percent); sending a message to the pastor or leader (12 percent); and posting on a bulletin board or forum (5 percent).
www.greymatterresearch.com

IN FOCUS

Product and Service Update

••• television research

More accountability for TV ad measurement

Rovi reporting tool to quantify ad effectiveness and ROI across platforms

Santa Clara, Calif., digital entertainment company Rovi Corporation has launched Rovi Analytics, a reporting tool designed to deliver metrics to measure TV advertising buys. Providing measurements including uniques, impressions and time spent, Rovi Analytics is intended to drive greater accountability for advanced TV advertising campaign performance.

Rovi Analytics extends measurement capabilities from service provider set-top boxes as well as connected television and video devices, offering campaign performance reports for agencies and advertisers that buy inventory on the Rovi Advertising Network. The reporting capabilities can combine census-level measurement with metrics to provide a view of campaign results across the various digital platforms Rovi serves. The performance metrics can be filtered by a range of criteria including daypart and geography and aim to enable advertisers to measure the effectiveness of TV ad units.
www.rovicorp.com

quirks.com/articles
ID 20120804

••• ethnographic research

Camera one, camera two

See-Me aims to offer visual narrative of consumer life

U.K. research company SPA Future Thinking has launched See-Me, an ethnographic tool designed to track where respondents go, what they do and what they are exposed to, providing a visual narrative of consumer behavior.
The solution uses a range of different cameras, from micro-HD video to fish-eye cameras, that aim to be unobtrusive so that respondents forget their presence.

Footage from the cameras can then be used in several ways. Researchers can use photo elicitation techniques to discuss content with the consumer and create a visual landscape from their point of view supported with a narrative or compile highlight reels to complement existing quantitative or qualitative research.
www.spafuturethinking.com

••• social media research

Net Promoter meets social media

SparkScore sets out to interpret social media data via NPS

San Mateo, Calif., research company Satmetrix has debuted SparkScore to measure customer conversation on the social Web using Net Promoter. SparkScore is designed to analyze, classify and categorize conversations customers are having in public and private social media about products and services by strength of sentiment.

SparkScore also offers benchmarking on a weekly basis to compare scores with others in the industry. SparkScore is available at no cost.
www.spark-score.com

••• music research

Whale-size music-listener data

Grooveshark launches Beluga for music insights

Grooveshark, a Gainesville, Fla., Internet music service, has debuted Beluga, a free music information tool that combines in-house market research with Grooveshark data to provide music insights. The free, no-registration-required tool aims to allow anyone to conduct in-depth research about a particular artist and their fanbase.

Tapping into Grooveshark's 20 million unique monthly users, Beluga conducts analysis to find correlations between artist affinity and their listeners' demographics, location and survey responses.
http://beluga.grooveshark.com

••• customer experience

VOC from a new VantagePoint

Bundled solutions aim to decrease CEM cost, complexity

Seattle research company NetReflector Inc. has released VantagePoint VoC Hubs, a suite of bundled, fixed-cost, feedback solutions designed to streamline VOC measure-

ment programs. The suite is customizable; can be implemented in as little as four weeks; and can address the full range of VOC touchpoints, including call center monitoring, customer/partner/employee satisfaction, Web site feedback and product/service satisfaction.

Built and hosted on NetReflector's VantagePoint enterprise feedback management software platform, VantagePoint VoC Hubs services include custom program design consulting; survey development; data collection/hosting; detailed reporting and analysis; and ongoing project management.
www.netreflector.com

••• data analysis

Adding analysis to the marketing mix

ThinkVine adds Analytical Services to optimization software

Cincinnati research company ThinkVine has debuted new analytical services offerings that are intended to deliver more strategic guidance about marketing spending levels, timing and tactics across consumers, channels, products and geographies. The information aims to produce deeper insight into consumer behavior to improve the accuracy of short- and long-term forecasts and the in-depth information provided for marketing scenarios.

Whether it be channel service, pricing service, product optimization service or segmentation service, ThinkVine's Analytical Services aims to maximize the marketing-mix optimization process. ThinkVine Analytical Services can be integrated with the ThinkVine Marketing Mix Optimization software.
www.thinkvine.com

••• virtual research

Meet Sherry

New offering uses holographic technology to conduct interviews

New York research company Ebony Marketing Systems has introduced Sherry, a holographic interviewer. Sherry can work in any location in any part of the world, though the current technology is somewhat limited in the types of studies for which it can be used.

Sherry works by inviting respondents to participate and then directs willing participants to use an iPad interface to take the survey and record their answers. Sherry comes equipped with two iPads for interviewing two respondents simultaneously. Clients can view Sherry in action remotely via a video interface.

The offering is geared toward long-term projects in moderate-to-high-traffic areas. In the future, Sherry will be able to conduct full interviews and record the responses. Sherry can also distribute incentives, samples and coupons. For more information call 718-742-0006.

••• tracking research

Optimize your studies

A four-part solution to help manage tracking

Bangalore, India, research company Cross-Tab has launched Tracking Optimiser, a solution designed to enhance the value of tracking studies by combining subject-matter experts, technology and established processes.

The four cornerstones of Tracking Optimiser are: dedicated tracking specialists to manage field issues, identify new efficiencies and achieve robust information to validate trends; a managed program to provide optimum control of the study and precision in managing sample frames; validation through other sources, including social media and below-the-line activity to help validate the findings; and real-time reporting via a mobile/tablet application to access data whenever and wherever.
www.cross-tab.com

••• hospitality research

How was your stay?

PillowChat for hotels sets out to mine social media for brand conversations

London research consultancy BDRC Continental has introduced PillowChat in the U.S. PillowChat is a social media product in the hotels sector, focusing on producing social media data to provide intelligence into what consumers really think about a brand.

Designed to help with a launch, build relationships or manage online reputation, PillowChat aims to allow users to understand what consumers think; respond and talk to consumers to encourage brand advocacy and drive sales; and manage reputation by engaging directly with positive and negative influencers.

PillowChat monitors user-generated content (i.e., blogs, wikis, Twitter, Facebook, photo/video sharing sites, forums, social networks, etc.) to discover what consumers are saying, with results analyzed by location, gender, age, date and sentiment.

The data can be viewed alongside more traditional quantitative data in an interactive dashboard.
www.bdrc-continental.com

••• online qualitative

An enhanced experience

Itracks updates BBFG software with improved video capability

Saskatoon, Saskatchewan, research company itracks has released video questions, answers and reporting enhancements to its bulletin board focus group (BBFG) product. With this release, itracks' BBFG moderators are able to post bulletin board questions and collect responses via a Webcam and tag videos as they watch the responses in one action.

A video reporting page allows users to search and edit video clips and create a highlight reel that can be inserted into reports.
www.itracks.com

••• customer experience

Three-pronged platform for CEM

Product suite uses customer feedback to better the bottom line

Ann Arbor, Mich., research company CFI Group has rolled out its latest technology platform intended to offer customers a set of analysis and workflow tools that monitor and measure the customer experience across multiple channels. The platform is combined with the methodology of the American Customer Satisfaction Index (ACSI), Ann Arbor, Mich., and consists of three integrated suites and supporting toolsets to provide a solution for organizations to listen, analyze and respond to customer feedback.

CF Monitor is designed to allow customers to continuously listen to the voice of the customer through multiple channels, including brick-and-mortar locations, call centers, Web sites and social media. The suite also supports a variety of traditional and emerging data collection methods.

CF Analyze is powered by a technology using the science of the ACSI to measure satisfaction and predict future behaviors and link satisfaction to financial results.

With CF Workflow, time-sensitive information is delivered through alerts and push reporting. The solution also includes case management tools to help alleviate customer service issues and document management for organizing customer feedback data.
www.cfigroup.com

••• sentiment analysis

Automated coding, human touch

Ascribe Intelligence aims to improve analysis of verbatim feedback

Cincinnati research company Ascribe has debuted Ascribe Intelligence, a suite of integrated analytics tools designed to allow organizations to gather, classify, code and then visualize verbatim feedback, regardless of industry, channel or language. Ascribe Intelligence aims to combine the accuracy of human processing with the speed of automated coding to help perform detailed analysis of consumer sentiment and derive business insight from that data.
www.goascribe.com

••• ad research

Look with a Digital Eye

Russian companies partner to launch targeting tool for banner ads

Moscow search engine Yandex and the Russian division of Chicago digital communications group VivaKi have released Digital Eye, a tool for targeting display ads. The advertising method is intended to allow advertisers to differentiate specific segments of the Web-user audience, depending on the amount of time they spend in front of their television sets. Digital Eye is based on Yandex's Crypta technology and is available exclusively to clients of VivaKi group agencies in Russia.
www.vivaki.com

••• panel research

App improvements for Toluna.com members

Mobile app sees several enhancements

Wilton, Conn., research company Toluna has updated its mobile application, following the reintroduction of Toluna.com, the company's member community Web site. Members may now use the application to participate in in-depth, traditional surveys. The iPad and iPhone app is available in English, French, German, Italian and Spanish. The Android app is available in English.

Among other capabilities, the Toluna mobile app enables members to ask and answer questions with

images, via mobile devices. They can also publish those questions and answers on social networks. The app is available to download free of charge from the App Store.
http://tolu.na/woQdMT

••• customer experience

Verint advances portfolio

VOC suite updated to include text analytics and interactive dashboards

Melville, N.Y., research company Verint Systems Inc. has launched a series of enhancements to its Voice of the Customer Analytics portfolio. The Insights module features embedded text analytics and interactive dashboards.

The integrated text analytics are designed to gather insight into the emotions behind collected feedback; benefit from automatic theme detection, comment categorization and sentiment analysis summaries; drill down into individual customer feedback to view exact comments and analyze root causes; and expose the why behind what customers and employees are saying about a company, brand or specific products and services.

The customizable dashboard and reporting advancements aim allow users to create and share dashboards to communicate developments, opportunities and problem areas to decision makers; incorporate data from external sources; and centralize and streamline corporate feedback.
www.verint.com

••• Briefly

■ Surrey, U.K., research company MARSC Limited has launched its MARSC Community Panel. The panel is customizable with multisite management and multilingual content options; allows users to recruit a well-profiled target audience; provides scalable community size; and offers direct engagement with customers and social media and community tools.
www.marsc.com

■ Research Now, Plano, Texas, has collaborated with New York research company Experian Marketing Services to overlay its U.S. research panels with Experian Mosaic USA consumer lifestyle segmentation, allowing Research Now to code its research panels using Mosaic's system, which classifies all U.S. households and neighborhoods into 71 segments and 19 overarching groups.
www.researchnow.com

■ Shelton, Conn., research company SSI has added Dublin, Ireland, research company Experian's Financial Strategy Segments coding to its U.K. sample, allowing respondents to be recruited based on financial behaviors.
www.surveysampling.com

■ Rochester, N.Y., research company Harris Interactive Service Bureau has launched Get Sample!, a sample-only offering designed to deliver respondents from Harris Interactive panels.
www.hisbonline.com

■ Westport, Conn., research company Imperium has launched ChildGuardOnline, a service to verify parental consent so Web sites and mobile apps can comply with the Children's Online Privacy Protection Act regulations. ChildGuardOnline also offers parents and guardians the ability to instantly approve and manage the Web sites they have authorized for their child's use via the service.
www.imperium.com

■ IBM, Armonk, N.Y., has released IBM Analytical Decision Management V7.0, a software platform designed to optimize resource trade-offs; use predictive analytics, rules and scoring to grow revenues and increase loyalty; predict and prevent threats in real-time; and manage assets and resources by predicting equipment failure, staffing downtime and service disruptions.
www.ibm.com

■ QSR International, a Doncaster, Australia, research software company, has released NVivo 10, featuring the ability to capture and work with Web pages and online PDFs; import Facebook posts, LinkedIn discussions and tweets from Twitter; and automatically code social media data and visualize the results.
www.qsrinternational.com

■ CMS Research, Toledo, Ohio, has launched a global research program to affordably employ a local toll-free number in each targeted, non-U.S. country. The program aims to ensure surveys are conducted at one location, in the consumer's native language, to provide uniformity across data collection.
www.cmsresearch.com

■ A new U.S. patent for using functional magnetic resonance imaging used Gainesville, Fla., research company AdSAM's Neuro Emotion System to identify specific regions of the brain that relate to measuring appeal and engagement. The patent was issued by the U.S. Patent and Trademark Office, Washington, D.C., and confirms that AdSAM accurately measures appeal and engagement, combined with empowerment, to identify specific feelings.
www.adsam.com

■ American Pasteurization Company (APC), a Milwaukee high-pressure toll processor, and The National Food Lab (The NFL), Livermore, Calif., have partnered to offer a high-pressure processing solution for food and beverage manufacturers in the U.S. The partnership offers APC's clients access to The NFL's full suite of services, including challenge studies, shelf-life studies, product development and formulation work, focus groups and taste panels.
www.thenfl.com

■ The CASRO Institute for Research Quality (CIRQ) division of the Council of American Survey Research Organizations (CASRO), Port Jefferson, N.Y., has awarded certification to New York research company Millward Brown's Africa, Middle East and Asia-Pacific region for compliance to the ISO 20252 standard for market, opinion and social research. Processes outlined in ISO 20252 are designed to produce transparent, consistent, well-documented and error-free methods of conducting and managing research projects. www.casro.org

■ Harpeth Marketing, a Franklin, Tenn., marketing firm serving the market research industry, has released "Marketing & Sales for the Market Research Firm: Part 1 - The Fundamentals," a 15-page e-book. The e-book is available as a free download at www.harpethmarketing.com/ebook.

■ Columbia, Md., research company Arbitron Inc. and the Coalition for Innovative Media Measurement (CIMM), New York, have released the results of a cross-platform pilot test that examines how TV viewers use PCs and mobile devices as second and third screens to access video content. www.arbitron.com

■ London research company Kantar Worldpanel ComTech has launched a Chinese mobile phone consumer panel. Worldpanel ComTech service will use Kantar Worldpanel's existing operation in China to conduct its interviews. www.kantarworldpanel.com

■ ThinkNow Research, Burbank, Calif., has increased the frequency of its Hispanic online omnibus survey to 12 waves per year. www.thinknowresearch.com

■ Perception Research Services International, Fort Lee., N.J., has completed a wave of shopper research on private-label usage, indicating that 86 percent of shoppers still purchase some private-label products on a regular basis. www.prsresearch.com

■ The Census Bureau, Washington, D.C., has released detailed estimates about the social, economic and housing characteristics of hundreds of race, tribal, Hispanic and ancestry groups at numerous geographic levels. The findings are contained in two data products: the 2006-2010 American Community Survey Selected Population Tables and the 2006-2010 American Community Survey American Indian and Alaska Native Tables. www.census.gov

■ Borderless Access, a Bangalore, India, research company, has launched InstaBid, a mobile app designed to give market researchers up-to-date information on sample feasibility and cost per interview for any online sample RFP across emerging markets. The app is available for Apple, Android and BlackBerry devices. www.borderlessaccess.com

Let's talk trackers

| By Melanie Courtright

snapshot

Careful planning and attention to detail during the creation of a tracking study are essential to ensure that it successfully measures critical business metrics.

quirks.com/articles ID 20120805

Trackers are one of the most important research tools for monitoring the long-term status of a brand or a population and, as a result, are heavily invested in by companies globally. It is critical, therefore, to get them right and to keep them finely-tuned. In 2011, trackers represented more than $2 billion in global market research dollars. These trackers monitored business-critical metrics such as brand equity, attitude and usage, advertising effectiveness, media and audience shifts and global product trends. Recent industry reports from multiple outlets all indicate a trend towards modest growth in 2012 figures, which means even more revenue will be spent on trackers.

When running a tracker, the design phase is critical. Every decision made during this period will have ongoing implications on the data and making changes well into a tracker can be costly – in terms of budget but also in terms of stability and comparability. We have to "measure twice, cut once." This upfront measurement of options and decisions comes down to asking ourselves the right questions, ones that are focused on the heart of the business objectives: What do we need to know and why do we need to know it? What is the business question we are attempting to answer? What decision(s) are we trying to make? What do we need to know about the customers or the marketplace? What data is required to answer these questions?

New questions appear

Once these initial questions have been answered, we can move into the actual design phase, where a new set of questions appear. These questions are more related to the survey work that will support the overall business objectives.

- Is this a recurring question where the data will change over time based on service levels, the competitive set or shifts in the marketplace?
- How often will changes occur? Would they move slowly over time or could they change frequently due to volatility, interruptions or disruptions?
- Based on those answers, should we survey continually to offset daily blips or as a recurring snapshot in time?

Business questions that require recurring measurement and that move over time are the most obvious candidates for trackers but other topics like product adoption curves and behavioral studies are also measured in an ongoing fashion to track population shifts. In an article[1] for MIT, Brynjolfsson and Schrage made the following observation about how fast our world is changing:

The evolution: Technology is allowing companies to test new ideas at speeds – and prices – that were unimaginable even a decade ago.

The effect: Innovation, the lifeblood of growth, is growing more efficient and cheaper.

What's ahead: Innovative companies will shift away from traditional research-and-development

methods. Managers will change the way they solicit ideas. And much, much more.

With change happening so fast, while impacting behavioral, pricing and buying trends, measurement has never been more important. To keep up with the movement, research tracker investment is heavy and return on investment is critical.

Sampling plan

Our next set of critical choices concerns the sampling plan. Based on my experience, this step is too often rushed, to the detriment of the resulting data. Correctly matching your business objectives to the right methodology and audience inarguably determines the success or failure of the project.

- Does our question pertain to the population at large or to a subgroup of customers, prospects or markets?
- What is the best methodology for reaching the target population?
- What types of quotas should we set to ensure we have a representative sample and meaningful data? And, are there subgroups we need to be able to measure? Will we be comparing over time and need sufficient data for analysis? What quotas should we set to ensure stability in the results? Will the design be replicable and sustainable next week? Month? Year? What quota design will ensure the results are reliable and defensible?
- Where do the people we need to talk to “live, play and talk” in their world? Online, by phone, on their mobile devices or in the social media space?
- How much targeting and profiling should we use and how does it impact the results? Would a “rep/augment” or some other hybrid approach be best?

Crafting the survey instrument

The most exciting and time-consuming part of a research project is often crafting the survey instrument. Survey design is a lot like a healthy diet. Too little or too much are both detrimental. Too little attention to design and we get weak, nutrient-deficient data. Too much time can result in an overweight, lethargic survey and a heavy data file and report. Balance is key and keeping the respondent in mind is essential to balance.

- What questions do we need to ask to get the right data? What is need-to-know versus nice-to-know?
- What questions are reasonable to ask our audience? What will they share?
- What questions and format will engage them – and what will cause them to shut down?
- How long will this audience talk to us meaningfully?

Brings clarity

The overall goal of the design phase is to achieve “fit for purpose.” Will the decisions we made during the research, sampling and survey design result in a data set that answers our questions and brings clarity to our decision-making? Is the newly-defined process a good fit for the business purpose?

Once a tracker is properly designed and executed, the data can drive insights. Shifts in the data over time should be the result of changes in the marketplace rather than from design or execution flaws. Your company will be positioned to stay in step with trends that will drive corporate strategy and innovation. And that’s the return on investment your stakeholders need to succeed.

REFERENCES

[1] Brynjolfsson, Erik and Schrage, Michael. “The new, faster face of innovation.” MITSloan article. http://sloanreview.mit.edu/executive-adviser/2009-3/5139/the-new-faster-face-of-innovation/.

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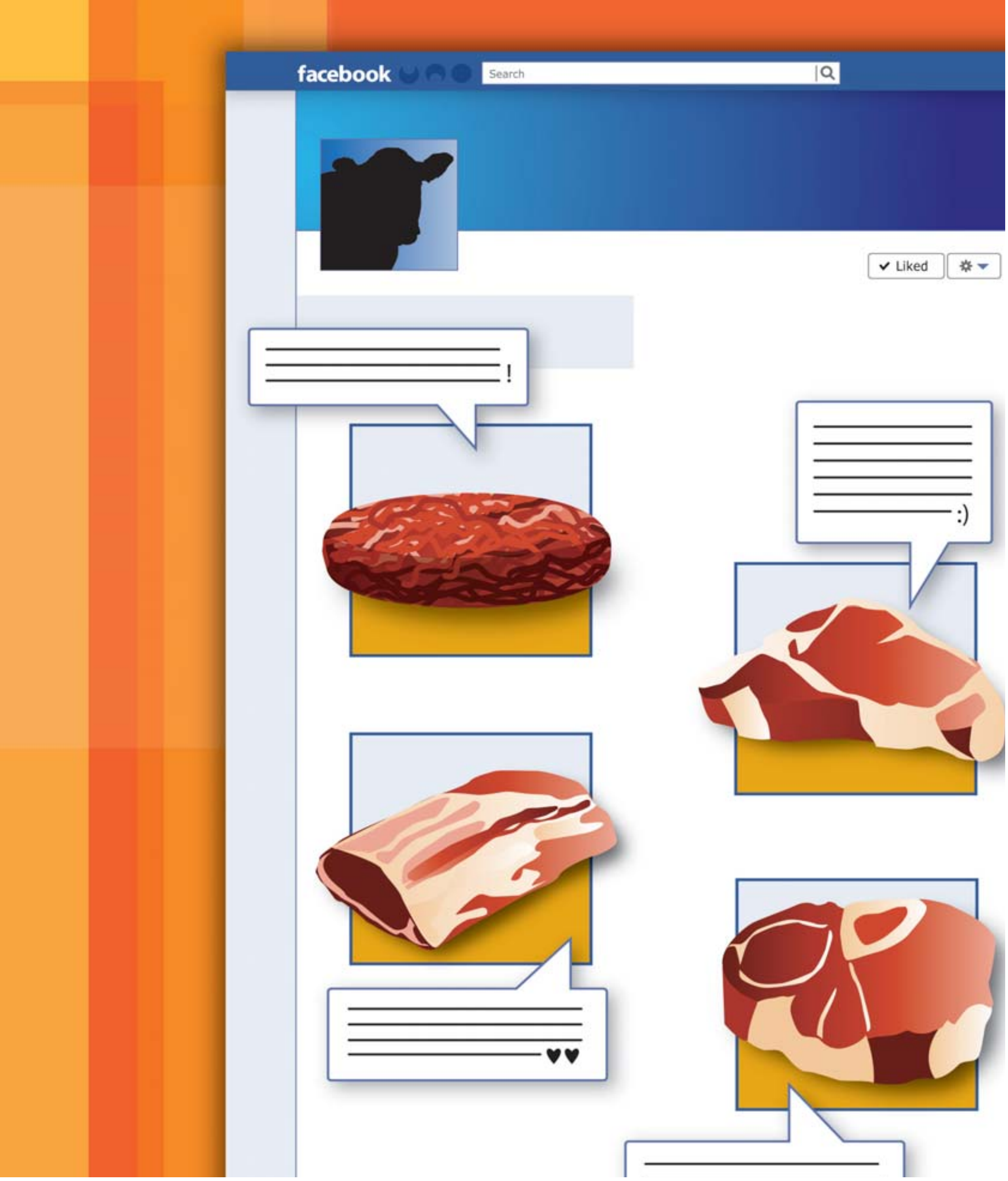

case study

snapshot

Looking to be proactive in its approach to research, the National Cattlemen's Beef Association found Facebook an effective, engaging way to talk to Millennials.

••• social media research

There's the beef

Research via Facebook sates association's appetite for insights

| By Scott Koenig and Wendy Neuman

Some of the greatness of hockey star Wayne Gretzky was attributed to his style of play. Gretzky, observers noted, had the uncanny ability to skate to where the puck was going to be, not where it had been, allowing him an open shot or an easy pass to a better-situated teammate.

His foresight has applications to market research. In a rapidly changing environment, we must develop methodologies and approaches to research that place us where the market is going to be, not where it was. If we don't, we may find ourselves trying to catch up and watching someone else net the game-winning goal. His foresight has applications to market research. In a rapidly changing market, we must develop methodologies and approaches to research that place us where the market is going to be, not where it was. If we don't, we may find ourselves trying to catch up and watching someone else net the game-winning goal.

It was this proactive, predictive approach that we took last year in conducting qualitative research for the National Cattlemen's Beef Association (NCBA). The NCBA was interested in understanding beef consumption habits of Millennials (those between the ages of 13 and 30).

Given the nature of our research questions and the behavior of the respondents we were targeting, we chose to go away from a standard online qualitative platform. While we had a good relationship with an online qualitative supplier, and while we were confident they could come through in executing this project, we decided to go with a non-traditional research tool: Facebook.

While we wanted to study these Millennials in their natural environment, we felt that conducting ethnographies nationwide would not be the best use of our resources and that Facebook presented a better way. With 75 percent of Millennials having created some sort of a social network profile (Pew Research, 2010) and with Facebook being the leading social networking site, we were confident we could engage this group in a setting in which they were comfortable sharing their thoughts and feelings with us and with other Millennials.

A group of respondents were recruited who not only met the age criteria to be considered a Millennial but who also met certain demographic and psychographic screening criteria specific to this study: eat beef at least twice a month; have some level of involvement in meal planning and/or prep; use Facebook regularly (at least twice a week) and have at least 25 friends on Facebook; can answer a series of attitudinal questions about current and future and current life plans; and be part of a representative mix of gender, age, and marital status.

Visit a Facebook page

Participants were recruited the same way they would for any other online focus group or IDI – with one exception. After qualifying and agreeing to take part in the study, participants were asked to visit a Facebook page we set up for the group, become our Friend and then return to the survey and answer some additional questions to verify that they had indeed visited the site. The latter measure was added to ensure that they were comfortable navigating on Facebook.

One of the concerns with using Facebook as the platform was a general lack of security associated with using an open social networking site. To remedy this, once the group was fully recruited, we simply changed the settings of the page to the highest level of privacy (by invite only, not shown on the participant's own Facebook wall and not able to be found through searches.)

Participants would need to be engaged in this discussion for six weeks. We knew that a study of that length could lead to participant burnout so we initiated processes to minimize the impact on them:

- We posted a new topic about two to three times per week. This would reduce the need for the participants to come to the group every day and let us avoid inundating them with daily messages.
- The moderator of the discussion was a Millennial himself who understood the principles of moderating and knew how to engage the group in a fun and non-intimidating way. After all, he was basically talking to his peers on Facebook, something he does regularly anyway. (Being from an older generation ourselves, we viewed our Millennial moderator as a bit non-traditional in the way he posed his queries – which sometimes caused us to cringe when we read a question. But those cringes turned to smiles when we saw how his "Millennial way" really resonated with the participants.)
- The moderator validated the opinions of the participants. He added his commentary to their responses and occasionally would try out a new idea that was developed based on their answers. These Millennials knew they were being listened to because the discussion was built around what they had told us previously. While it is important in moderating to validate the comments of participants – regardless of their age – past research on the Millennials indicated that, perhaps more than the generation before them, Millennials are craving for their voice to be heard.
- Random prize drawings were held throughout the six weeks of the discussion. In addition to the honorarium they received for taking part in the discussion, participants would occasionally be offered a chance to win a gift card for giving the best idea, sharing recipes and cooking ideas or just being selected at random among those who participated that day.

Drop-off expected

The aim was to have 60 Millennials fully participate in the discussion. Some drop-off was expected, particularly given the length of time and the season in which this session was conducted (it began mid-November and ran right up to the week of Christmas). A total of 227 Millennials qualified and agreed to take part in the group. Of this, 119 became our Friends (52 percent) and, of those, 66 were actively engaged (55 percent).

There were 27 topics posted, with 1,545 total responses by the participants. This equates to about 57 responses per topic and about 22 responses per participant.

While we can't talk much about specific insights we came away with, we can say that we emerged with a much deeper understanding of behaviors and attitudes of Millennials. We had quantitative data on behaviors of Millennials but the results from this study added more meat (pun intended) and depth to that data. New insights were gained into how the NCBA could improve packaging, distribution, in-store promotions and social media marketing. We learned not only that we needed to motivate and educate the Millennials toward a desired behavior but also critical insights into how to do so.

Additionally, the NCBA, which had used more traditional market research methods, realized the benefits of using social media – not only in its communication efforts but also in market research as a means to continuously study the consumer and understand their otherwise unarticulated needs. This inaugural Facebook study allowed NCBA to venture into uncharted territory. As a result, the organization has subsequently used, and will continue to use, Facebook and other non-traditional research methods to reach out to consumers in their environment.

Dynamic dialogue

This method allowed for a rich, colorful and dynamic dialogue between participants and the moderator, so much so that the moderator had only to pose the daily question and watch the conversation progress from there.

Almost everything that can be done on a traditional qualitative platform can be done on Facebook: messaging, uploading and viewing images and videos and chatting – just to name a few – are built in to Facebook. Facebook's discussion feature is not as robust as traditional qualitative research platforms and this took away from the ability to have a threaded discussion. However, because of who this group is – they enjoyed talking to each other and found the topic relevant to them – they would typically go through and read what their friends had to say about a topic and reply as appropriate.

The analysis tools found in some traditional platforms are not included in Facebook and this required a little more concentration and focus on the back end. While there was some additional time associated with that back-end analysis, the costs were minimal and besides, who doesn't need an excuse to concentrate and focus a little more on analysis?

A return to old-school research

This study was an exercise in using 21st century technology to reach Millennials. Yet, in many ways, it was a return to old-school market research: go where the people are, observe them and talk to them in their own natural setting where they feel most comfortable.

Using Facebook did not compromise sound market research principles. The insights we were able to bring to the surface were equal to – and in some ways surpassed – those that would have been gained using other platforms.

While Facebook may not be the ideal platform for all qualitative research – even among Millennials – it has potential to be a powerful qualitative research tool. As market researchers we should look to it, and other forms social media, as one way to go where the puck is going to be, not where it has been.

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case study

social media research

Reaching out for help

Social media-based tools helped find, retain respondents for unique study

| By Kelley Styring

snapshot

Seeking product design insights for our multitasking-crazed world, researcher Kelley Styring sought input from an unlikely source: arm amputees.

quirks.com/articles • ID 20120807

In ancient Greece there was the oracle, the visionary, who could see the future. Today, we call people like Steve Jobs a visionary. But since Jobs possessed the means to make his visions come true, did he really see the future? I don't think so.

As a market researcher, I know that I don't control the future. Unless I invent a completely new research technique, I don't actually create anything myself. Market researchers are advisors, nudging and cajoling organizations to act upon our insights. And while motivating actions based on insights has been my life's work, I've often wished that my work felt less like a rearview mirror and more like a crystal ball. The occasions when market research creates actual foresight are so rare that sometimes we don't even see them until fully immersed in the outcomes.

To take my own shot at glimpsing the future, I created a syndicated study called "One Handed World." The study was inspired by the rise of the smartphone and the fact that we are all on the go and trying to get more done in less time. Our need for convenience and for products designed to accommodate our smartphone-driven, multitasking lifestyles is greater than ever yet precious little that we interact with each day has been designed to operate with only one hand.

Data gathered from consumers shows that they spend about 40 percent of their waking hours with one hand occupied (carrying groceries, using a cell phone, sipping a coffee, brushing their teeth, etc.) and about half of that time, they're interacting with a wide variety of other products and packages using a single hand or finger. This evolutionary trend means consumer product makers that don't change their product and packaging designs accordingly could face economic extinction.

My study has found that one-handed convenience creates delight

and engenders loyalty in consumers. A product that is easy to use with a single available hand creates a tremendous competitive advantage for itself. It also can boost profits, since consumers will pay a premium for convenience.

Isn't exactly foresight

Yet, aside from measurement of existing and emerging behaviors, exploring this condition of one-handedness isn't exactly generating foresight either. Again, it is measuring today or yesterday and trying to predict tomorrow. That's interesting but not very inspiring.

Then I remembered trends toward developing skincare and styling products for an emerging group of men in the 1990s. They were called metrosexuals and they responded to grooming products differently from mainstream men at that time. The products themselves were not specifically developed for this trend, because this was an emerging market and not fully defined.

The target studied was an "extreme population" – meaning men who were deeply invested in grooming and committed to products that were not made for them but for women. By studying an extreme population and predicting that a trend would emerge, foresight was achieved. And this foresight was very motivating to beauty care companies looking to grow their businesses rather than just steal share from each other in the women's market.

I started to think about one-handedness and reflect on my own struggles and triumphs. I recalled dropping a cell phone into an open cup of latté while driving. Utter fail. I also remembered not only finding a lipstick deep in the bowels of my purse but maneuvering to open it with one hand, not dropping the cap, applying it and recapping it all while talking with my mother on the phone. The Cirque de Soleil might have hired me after that audition.

As I pondered it more, I thought, who better to teach us about living in a one-handed world than arm amputees, who live elegantly and efficiently with only one hand, potentially providing us with a preview of this shift in overall consumer behavior?

But how could we reach into this culture and glean the right information? How could we conduct this study at all?

Social networks play a vital role

This is where social networks and communities played a vital role. It's the difference between hunting and gathering. A typical market research study involves obtaining information from a broad sample – tailored at times to target groups but generally representing a large population. This gives us ample insight to drive mainstream businesses ahead. But to leap forward into foresight, we need to reach finite populations – those in the "new" space – those ahead of the pack. And this involves hunting.

In the past, to do a study of this nature, where you were seeking a small, finite population with unique characteristics, you'd have to screen hundreds of thousands of people by phone and arrange personal interviews to verify that they met the criteria (arm amputees) and collect information, video, etc. The effort would certainly meet the definition of finding a needle in a haystack and cost many hundreds of thousands of dollars and years to implement.

That was then. This is now. While it was not a simple effort, with technology and social networks it was feasible in a way it never has been before. Partnering with Winston-Salem, N.C.-based Bellomy Research, a community developer and technology provider, InsightFarm tapped into an insular population and built trust needed to gain access and collect information. Leveraging one contact to create three, three to create 10 and 10 to create hundreds, within a year the community was populated with enough amputees who trusted us enough to reveal the insight we could transform into foresight.

Using self-reported video diaries and the conversational interviewing the platform allowed, we were able to take our learning to a level not possible before this technology. We were not only able to create conversations of our own, meeting our objectives, but also listen as respondents discussed issues of their own concern, learning from their interactions. And these interactions them-

Table 1: Top 10 Most Difficult Product/Activity Categories

One-Handed Consumers

Rank	Category	Percent
1	Tools	49%
2	Other Foods	46%
3	Health/Medical	39%
4	Package Types	38%
5	Snacks	33%
6 (tie)	Cooking and Eating	30%
6 (tie)	Beverages	30%
8	Sports/Recreation	27%
9	Electronics	21%
10	Personal Care	18%

Two-Handed Consumers

Rank	Category	Percent
1	Tools	58%
2	Health/Medical	48%
3 (tie)	Package Types	44%
3 (tie)	Cooking and Eating	44%
5	Apparel	42%
6	Snacks	37%
7	Sports/Recreation	36%
8 (tie)	Other Foods	33%
8 (tie)	Beverages	33%
10	Personal Care	27%

selves would not have been possible without the social networks and the technology in play.

In the community, we conducted quantitative measurement of difficulty interacting with more than 250 everyday products and packages, along with specific moments of interaction that are difficult and reasons why there is difficulty. The same measurements were made among the two-handed population for comparison, with many surprising findings.

Custom follow-up studies for subscribers were conducted, assessing new concepts for products and packages inspired by the third phase of the research. This continued access provided rich foresight for the companies involved.

It's not the consumer, it's the product

Overall, one-quarter of amputee respondents found everyday products difficult to operate with one hand, with the degree of difficulty increasing with the complexity of the task. I was stunned at the number of products that two-handed consumers reported difficulty opening or using – even when both hands were fully available. And they reported difficulties in the majority of the same categories as the one-handed consumers (Table 1), which means the issue isn't with the consumer, it's with the product.

Interestingly, this study suggests that arm amputees are actually more capable than two-handed people in this emerging one-handed world and as such, lead the way to the future of product and package design for everyone.

So, what's a product or package designer to do? People evolve, and it's time for products to evolve too. This isn't about high-tech gadgets. In fact, this is even more important for low-tech products. Items people use every day – adhesive bandages, ketchup packets, tape, yogurt cups and more – could greatly differentiate themselves from competitors by being easier to use with one hand. (This concept is actually different from universal design, which provides access to everyday products and packages for those with special needs.)

While "hands-free" remains the gold standard for ease of use, that's not always possible. Through our study, we developed 17 different innovation platforms designers can use to create or improve their products or packaging. For example:

- One-handed stabilization and manipulation. With a product that requires one hand to do two different jobs – stabilize an item and manipulate it at the same time, such as opening a jar – can the palm be used to stabilize it while the fingers of the same hand open it?
- "Toothiness." Much to dentists' dismay, the "third hand" is often the teeth. While it may be unsafe and socially unacceptable, teeth are being used to compensate for packages that are difficult to open. Designing packages to be opened safely and hygienically with the teeth could be paradigm-breaking, rather than incisor-breaking, for consumers.
- Packages with predictable opening results. It doesn't matter how many hands you have available to use if you can't count on a particular package to open in exactly the same way twice. Consistency counts with, and creates delight in, consumers.

Community surged on

To me, one of the most interesting results of this project arose from social media tools we used. As the research came to an end, the energy of the community surged on. Our study actually brought people together with common needs and bonded them strongly enough that we transitioned the community to a new group on Facebook so they could keep interacting and supporting each other. We continue to moderate this closed group so they have a safe place in which to gather and we have access to them should future research questions arise, providing an ongoing benefit to everyone involved.

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quirks.com/articles • ID 20120808

••• social media research

Are you listening?

Customer service expectations and preferences in the age of Facebook

| By Jim Stone and Eric Levy

snapshot

A recent Maritz Research study shows social media outlets are changing how consumers communicate with companies. What does this mean for marketers and for the marketing research industry?

Who hasn't heard stories like these?

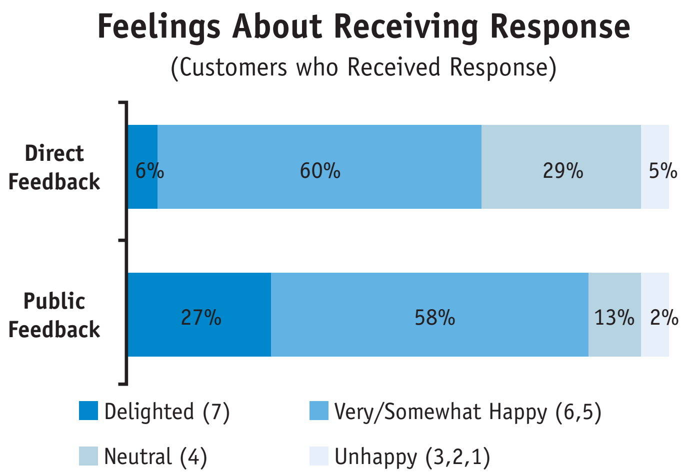
A passenger on a jet sees his expensive guitar thrown to the tarmac and complains to the airline, but gets no satisfaction. He creates a YouTube video that goes viral, generating more than 12 million views.

A telephone hardware manufacturer launches a much-anticipated handset, only to learn through social media that the phone has significant hardware and software issues.

A woman purchases a baby shower gift through an online retailer and finds herself at war with the retailer over the price, shipping and availability of the items she purchased. With no other recourse, she tweets her complaint to friends and family. The story gets picked up by the media, consumer protection organizations and legislators in Washington, D.C.

An automobile manufacturer releases a high-tech option for its vehicles. As customer problems begin pouring into the manufacturer's customer support area, an astute employee adds additional representatives to monitor social media and address customer complaints there as well

Figure 1



Source: Consumer Preferences Study, Maritz Research, June 2012

as direct complaints made to the company.

The impact of social and consumer-generated media (CGM) is clearly enormous, akin to the proliferation of the Web twenty-some years ago. These are the narratives that keep corporate communications executives up late into the night with worry. Some of these stories have become mythic in the many retellings but they point to one clear trend: companies have lost control of their brands. Consumers all across the world have been empowered to make or break corporate reputations with the stroke of a pen – or in 140 characters or fewer.

Like many other industries, marketing research practitioners are grappling with the implications of this medium. How will it impact our data collection? Are we getting a true picture of the marketplace if we ignore consumer-generated media? As research professionals, what are our obligations to consumers who throw their opinions freely into the social media landscape?

Pundits, politicians and professors argue vociferously about these points but one thing is clear: like the companies they support, marketing research companies have lost control of the voice of the consumer. Perhaps we've misjudged ourselves, thinking that our sophisticated approaches, high-end technology and advanced analytical methods have actually empowered us somehow. The reality is the voice of the customer has always belonged to the customer. We're just the conduit.

With decreasing survey response rates and coverage issues becoming critical problems to both practitioners and client organizations alike, there's little doubt that marketing researchers will need to develop new approaches to try to address the burgeoning social marketplace. The marketing research industry has only begun to face these and other related issues – some with greater success and impact than others.

Stand on the precipice

Just as the research industry was slow to recognize and leverage the influence of online, we now stand on the precipice wondering whether our significant investments in data collection technology, people and analysis will evaporate in favor of some strange flavor of social media aggregation. It occurred to us, as marketing researchers specializing in customer experience measurement, that our own industry may be willfully blind when it comes to consumer preferences in this new world. It became apparent that while many assert points of view on these topics, no one has really done a thorough job of assessing the customer's perspective of this new world.

We set out to rectify this. Late last year, we conducted a poll among Twitter users to better understand consumer expectations, behavior and attitudes when they complain about companies through Twitter. This study highlighted a key aha moment that shouldn't have surprised anyone: Tweets are not personal communication; if a consumer tweets a complaint about a company and the company responds to try to solve the problem, the vast majority are absolutely delighted that the company responded.

In an age of robust call centers, online chat representatives and embedded e-mail tools, why would anyone be shocked that consumers actually think that companies see their tweets and act accordingly? After all, haven't we trained this new generation of consumers that the squeaky wheel gets the grease? Lifetime value scores have been replaced by Klout scores – she who has more followers gets more attention.

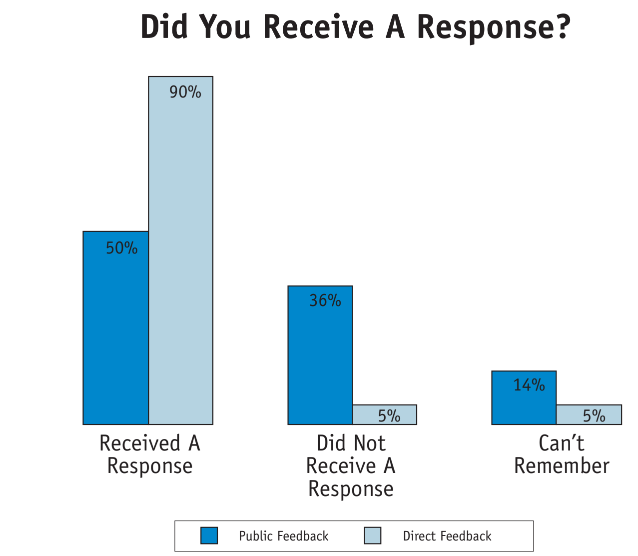
This realization, combined with the news that Congress was again considering sweeping privacy legislation, as well as a significant shortage of data-informed dialogue on the issue, led us to conduct a follow-up study to better understand consumer awareness, usage and attitudes toward ways they could speak to companies they do business with.

Again, the findings weren't shocking to anyone who has already realized that consumers are in charge. However, even we were surprised at some of the key learnings that emerged from this study.

We were not surprised that the majority of consumers who complain about a company expect that company to respond. We were intrigued to see that this was true irrespective of the method consumers used to voice these complaints. In fact, among consumers who received a response back from the company, those who used "public" feedback mechanisms (social media like Twitter, Facebook, etc.) were much more likely to be delighted or at least somewhat happy about this response than were those who used the more traditional "direct" route, such as a phone call or an e-mail (Figure 1). Almost all of the consumers complaining with public methods (85 percent) were at least somewhat happy about receiving a response vs. 66 percent of those who used direct methods.

When you look at "delight," more than one-in-four of the consumers using public methods of complaint were delighted with receiving a response, compared to less than one-in-10 consumers who complained directly to

Figure 2



the company with traditional means. That's pretty great to know. Social media is still new enough that consumers apparently don't think that companies are on the ball about monitoring for complaints and therefore, those companies that do respond get on their customers' good sides with greater ease.

And consumers apparently aren't wrong with these lessened expectations. Only about half of the consumers who complained using social media said they received a response to their complaint. Compare that to the 90 percent of consumers using direct methods to complain receiving a response back from the company (Figure 2).

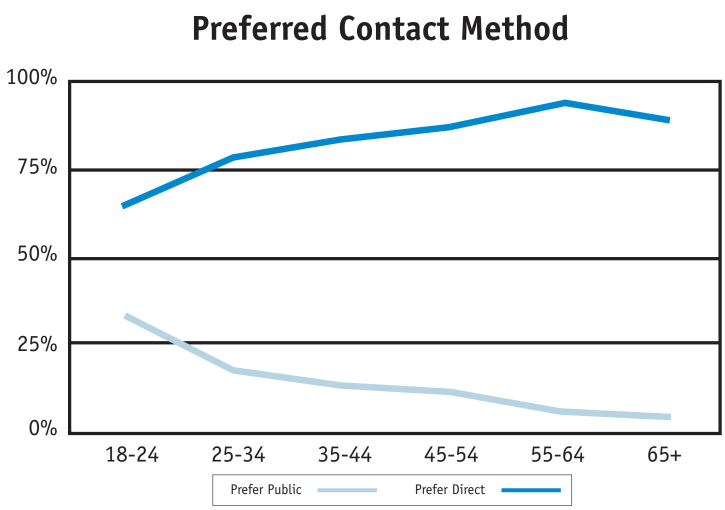
Which bucket of companies includes your company? Which pool of "delighted" consumers would YOU rather have?

Let's put this in context. Not surprisingly, most consumers (59 percent) use only direct means when they need to complain about a customer experience. That is, most consumers are still using telephones, letters or e-mail to contact these companies. Contrast that with the finding that nearly one-in-10 (9 percent) of consumers only use public mechanisms to complain – Twitter, Facebook, Google+, LinkedIn, etc. However, another one in three consumers (32 percent) is using BOTH types of communications methods.

Surprisingly close

Add up the proportions of those using at least one of the methods and we find that the disparity between

Figure 3



those who at least sometimes use public complaint mechanisms to be heard is now surprisingly close to those ONLY using direct methods – 41 percent vs. 59 percent.

Who are these public complainers? Not surprisingly, the majority are under age 45, about 73 percent. Compared to those using exclusively direct methods, only half as many (39 percent) are under age 45. Among those using both methods at least sometimes, 61 percent are younger than age 45.

This becomes even more startling when we dig into which method is most preferred: only one in seven consumers (14 percent) prefers public methods of complaint. The majority still prefer direct methods (86 percent), but given that the whole social movement arguably started in 1997 (with SixDegrees.com, according to Boyd and Ellison's "Social Network Sites: Definition, History, and Scholarship") – in 15 years, social media has gone from being a novelty to the main mechanism of company conversations for a significant proportion of the U.S. population.

Age clearly plays a huge role in the method preferred (Figure 3). Although direct methods are preferred most regardless of age, this is most apparent among older consumers. Conversely, a third (34 percent) of the 18-24-year-old consumers prefer public methods. While this falls off dramatically as age increases, it doesn't seem like a very large disparity given how new public methods are relative to other methods. And the clear trends in the data give us an indication of what the future probably has to offer.

Assuming a new method of contact isn't around the corner, what will

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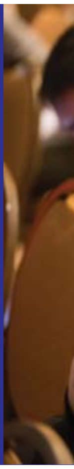

BY AND FOR CORPORATE RESEARCHERS!

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today's teenagers prefer when they become adult consumers? How long before public methods overtake direct methods in popularity? Our data suggest the next generation, who will be the first to have grown up in a social media-dominated environment, may well be the first to prefer the public methods. After that, it would only be a matter of time until today's dominant methods become secondary.

Crumbling of the divide

Another area that was interesting to us was the crumbling of the so-called digital divide. Although the majority of both public method and direct method preferrers were white, those preferring public means were much less likely than their counterparts to be white. In addition, those preferring public methods were twice as likely to be Hispanic or Latino (25 percent vs. 11 percent).

Other common wisdom discarded by this study included the finding that there was no significant difference in the incidence of males or females in the groups preferring public methods vs. those preferring direct methods. Also, the notion that education drives online sophistication and comfort was turned on its ear: those preferring public vs. direct methods were equally likely to be high school graduates or college graduates. Interestingly, those preferring direct methods were more likely to have a post-graduate education. Apparently, those with more school prefer "old school" methods of contact.

Created new expectations

In summary, there's no doubt that social media and CGM have created new expectations about how companies and consumers interact. Regardless of complaint method, consumers expect the companies they deal with to respond. And, if they complain using the new "public" methods (social media), a company who responds is more likely to garner delight from these consumers.

While age, education and income are still useful predictors of online vs. direct preferences, they aren't as predictive as they once were. There's strong evidence that the trends we see in this study will become the norm as younger consumers make up a larger proportion of the non-retired marketplace.

As an industry, we need to look hard at our concepts of privacy for their appropriateness in the age of social media. Where once we laid out strict guidelines to self-regulate our industry and protect our livelihoods, we need to examine whether online conversation fits into this bucket of "respondent protection." Certainly someone standing on a street corner and shouting his opinion isn't looking for privacy. Social media and CGM are the new soapboxes of our generation. Our thinking and approaches have to extend beyond protecting our data collection investments to stay relevant in this new era.

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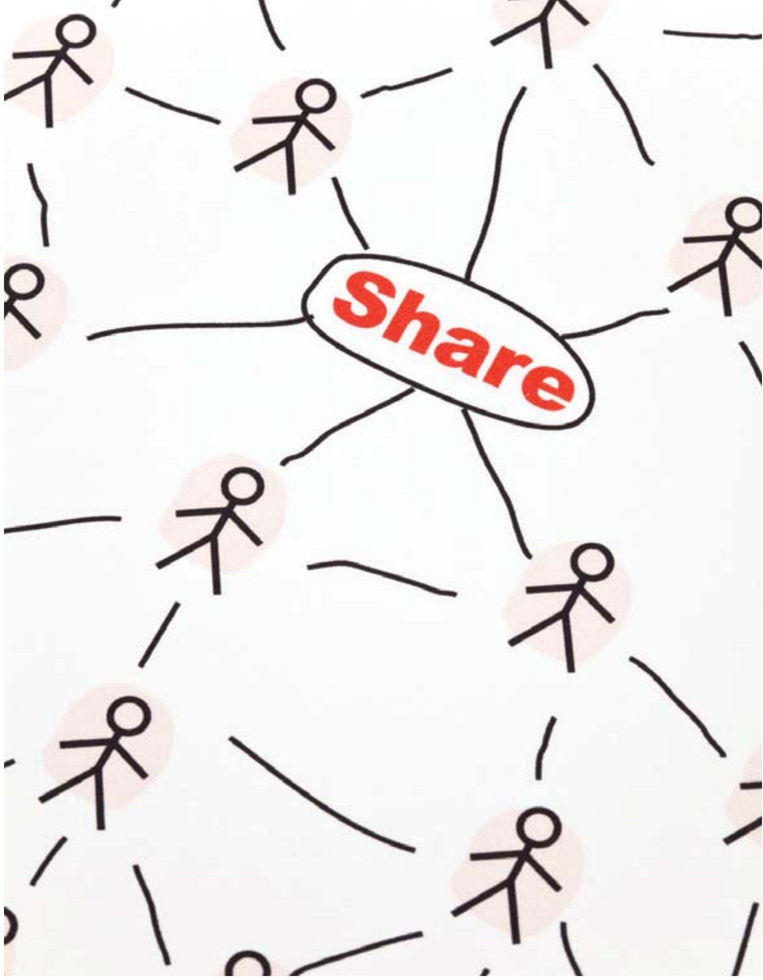
social media research

Share and share alike

Social media's influence on traditional qualitative research

| By Kelly Hancock



snapshot

Qualitative researchers explore the ways that social media is affecting their projects and those who participate in them.

It's no secret that social media is rapidly changing our society. It's affecting interpersonal relationships, purchasing decisions, business initiatives, one-on-one and mass communication and more. The role of social media in the modern world has made it increasingly important for qualitative researchers to understand new methods of communication and adapt their research approaches accordingly to capture the deepest insights.

While some researchers are integrating social media methodologies into their research projects, even those who don't are experiencing – and sometimes leveraging – the power of social media in their daily work.

Publicly share

In this virtual world, people are highly accessible and willing to publicly share the happenings of their lives. Hundreds of millions of people around the globe post details about themselves daily, enhancing opportunities for market researchers to learn about a specific category, brand or product.

The amount of qualitative data available to researchers increases with every share, pin, post and tweet. As a growing number of social media users expose more about themselves, qualitative researchers have a growing opportunity to gain better perspective into people's lives. "People are online and socializing, which means that it's very easy to reach them there," says Ricardo López, president of Hispanic Research and a member of the Qualitative Research Consultants Association (QRCA). "Research becomes easier when things are accessible. I utilize social media to find target markets, study what people are saying and proceed with analysis."

This connectedness broadens horizons for qualitative researchers, who find that people are online more and engaging more. "Mobile devices expand the possibilities of when and where you can interact with consumers," says Liz Van Patten, principal of Consumer Advisory Panels/Van Patten Research and a QRCA board member. "Social media and mobile devices all intersect, which creates opportunities for research methodologies to become more sophisticated."

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Growing sense of openness

Social media has welcomed – encouraged, even – users to share the most basic information about daily life. (Think of all those posts you've read about what your friend had for dinner or the photos you've seen of kids just being kids.) As consumers are afforded a public voice through social media, there's a growing sense of openness and a willingness to share. Some qualitative researchers have seen this trend translate into more openness and honesty in focus groups and online settings. "My general observation is that people are exposing themselves so much more than they ever used to," says Diane Harris, principal of D.M. Harris Associates and a QRCA member. "People are more willing to talk and show the core of who they are."

Abby Leafe, principal of New Leafe Research and a QRCA member, explained how the use of social media affected her research on digital dating violence. "As part of a project that had several components, I created a Facebook account that was somewhat personalized and friended the participants before conducting research. They saw me there like all their other friends. Being Facebook friends with the participants added a layer of friendliness and intimacy to the research. It got them to open up more," Leafe says.

She's also noticed a change in traditional market research, noting that people seem to be more forthcoming with their thoughts and opinions. "Social media has encouraged people to share more on Facebook and Twitter. The increasing use of photos and videos speaks to a greater degree of comfort. It is affecting our techniques as researchers," she says.

Van Patten agrees that research techniques and results have been affected by social media. She finds that her insights are more in-depth because of social media's presence. "When research respondents are asked to upload still photos or videos while they're using a category of products, the photos and videos generally portray the user in a natural setting," Van Patten says. "The home setting gives more breadth of understanding to what we're exploring in the research. We can see more about their family setting and how the product actually fits in."

Spurred an evolution

The digital age has spurred an evolution in the ways our society communicates. Consumers have come to expect an e-mail over a written letter and a text message over a phone call. These everyday changes are shifting into the business world – and the qualitative research field.

López said that he recently conducted research about people who drink a particular brand of coffee. He asked participants to take and submit a photo of the coffee in their kitchen. Every respondent submitted a photo from his/her mobile device. "Everyone was able to conveniently take the photo with their phone and send it to us through text or e-mail," he says.

Many researchers indicate that people seem more comfortable participating in qualitative research if they are able to communicate in ways that feel natural to them. Additionally, researchers indicate that they find many people saying things online about brands and products that they normally would not say in person. "Consumers will increasingly expect to interact with researchers in the ways they're interacting with others online. It behooves us to stay on top of it," Leafe says. "Social media touches on every single thing that we do. Accurate research reflects that it's not a question of who uses it – it's more about how."

The flipside, says López, is that, in addition to the benefits, mobile devices have become a distraction in face-to-face communication. "The first thing is trying to get them to shut down their phones and stop texting while I'm talking," he jokes.

More educated

Consumers are becoming more familiar with and educated about technology, brands and products in the digital age. This increased knowledge of online tools is shrinking the gap between researchers and research respondents.

Van Patten finds that the training and explaining processes of her online research are becoming less critical, due to the growing familiarity participants have with technology. "When I moderate online bulletin boards, I have to explain less to people. Everyone is online now. Research platforms have gotten more sophisticated, but so have many consumers," she says.

In fact, consumers have come to accept online tools as standard forms of communication. In some instances, research respondents are going so far as to demand the conveniences of online platforms before agreeing to participate. "Recently, I am finding that respondents are savvy enough to say that they will do an online project but they need to be able to do it from their smartphone or iPad," says Van Patten.

Consumers have expanded their knowledge on more than just online tools. The Internet and social media have changed the way many people view products and brands. It has become easier and more likely that consumers will form opinions about products and brands before they have even used them.

Social media platforms like Facebook, Twitter and Pinterest have become common places for brand discussion among consumers. Online communities and message boards also hold significant importance with regard to consumer discussion and education. "Researchers are encountering increasingly educated consumers exclusively because of the digital age," Leafe says. "It is rare to come to a group when people haven't researched the topic to a degree. Things you wouldn't even think they needed to research – like breakfast cereal."

"People are definitely more informed on topics because they can educate themselves," López adds. "They will educate themselves before they come to a focus group or on their phone while they're in the waiting room. They want to portray themselves as smart but it affects research. As a researcher, you have to be up to speed and aware of how people are doing things today. We're not just asking questions. We're in the business of understanding people and behavior."

Tapping online resources

Some researchers have begun tapping into their online resources in very innovative and noteworthy ways to enhance the recruitment processes. As social media users often reveal significant – and sometimes insignificant – details about their lives, opportunities are created to identify groups of people based on characteristics that often are not tracked in any other way.

Harris is using Pinterest to aggregate information to find consumers and learn about the culture associated with certain brands and products. She searches Pinterest for pins about a client's product and category and then digs deeper into the pinners' social media accounts. By looking at other pins from these users, Harris can learn more about the people interested in the brand and products. "I can view profiles to learn about the culture of my client's brand and the types of people I should target for research. I can also try to reach out to some of the users via Facebook, Twitter or LinkedIn about participating in formal research," she says.

Van Patten also has taken to social media to recruit knowledgeable consumers. "During a research project on hair loss for men and women, we were having difficulty finding participants through recruiting databases," she says. "We decided to place some ads and target communities and message boards that dealt with the issue. Shortly after, we were able to fill two bulletin boards and conduct successful research by defining the narrow target audience."

Look through the window

The opportunity to reach educated consumers will continue to expand through social media. The ability to look through the window to truly see those people and communicate with them effectively also will expand and create great opportunity for qualitative researchers to understand consumers and what drives them.

Kelly Hancock handles communications for the Qualitative Research Consultants Association. Visit www.qrca.org for more information.

••• social media research

Beyond listening and monitoring

Drawing more useful insights from social media data

| By Sourabh Sharma

snapshot

Using a study of chocolate brands, the author explores the ways consumer comments on social media can complement marketing and advertising programs.

One could argue that anyone with a Facebook account is engaged in a sort of informal observational, qualitative study every time they log on. Friends post recreational updates, movie reviews, political rants, life events and general musings – each of which provides a sliver of insight.

These shared insights are highly personal and unfettered, yet many are public and readily available – everything a marketing researcher or branding professional should hope for. Spontaneous conversations over the Internet provide a candid, honest and real-time view of consumer perceptions. But turning those insights into actionable strategies unleashes the true power of social media research.

A recent case study took social media research beyond listening and monitoring to uncover actionable insights from the plethora of online conversations featuring some ubiquitous chocolate brands like Hershey's and niche brands like Toblerone. Researchers set out to learn more about the competitive landscape and perceived identity of each chocolate brand – not only how many times each brand was mentioned but the actual sentiment and passion behind the comments. The resulting insights can be used by marketers to define online engagement strategies and inspire offline marketing activities, proving there is tremendous value in digging deeper into the context and content of online conversations.

For a period of one year, these researchers compared consumer attitudes regarding chocolate brands from both the U.S. and Brazil. The approach used in this study is applicable to any consumer brand that is mentioned with sufficient frequency in social media conversations. The data-mining phase of the research study relied on text analytics and Web scraping, often in association with predefined constructs. However, what sets this research apart from traditional monitoring is the subsequent analysis and how the interpretation of the data enabled important findings to be transformed into strategies.

Any relevant, publicly available comment was captured for analysis, including Facebook posts and Likes, tweets, blogs entries and user reviews. Whereas marketers and researchers strive to uncover the most current and candid thoughts of consumers, social media

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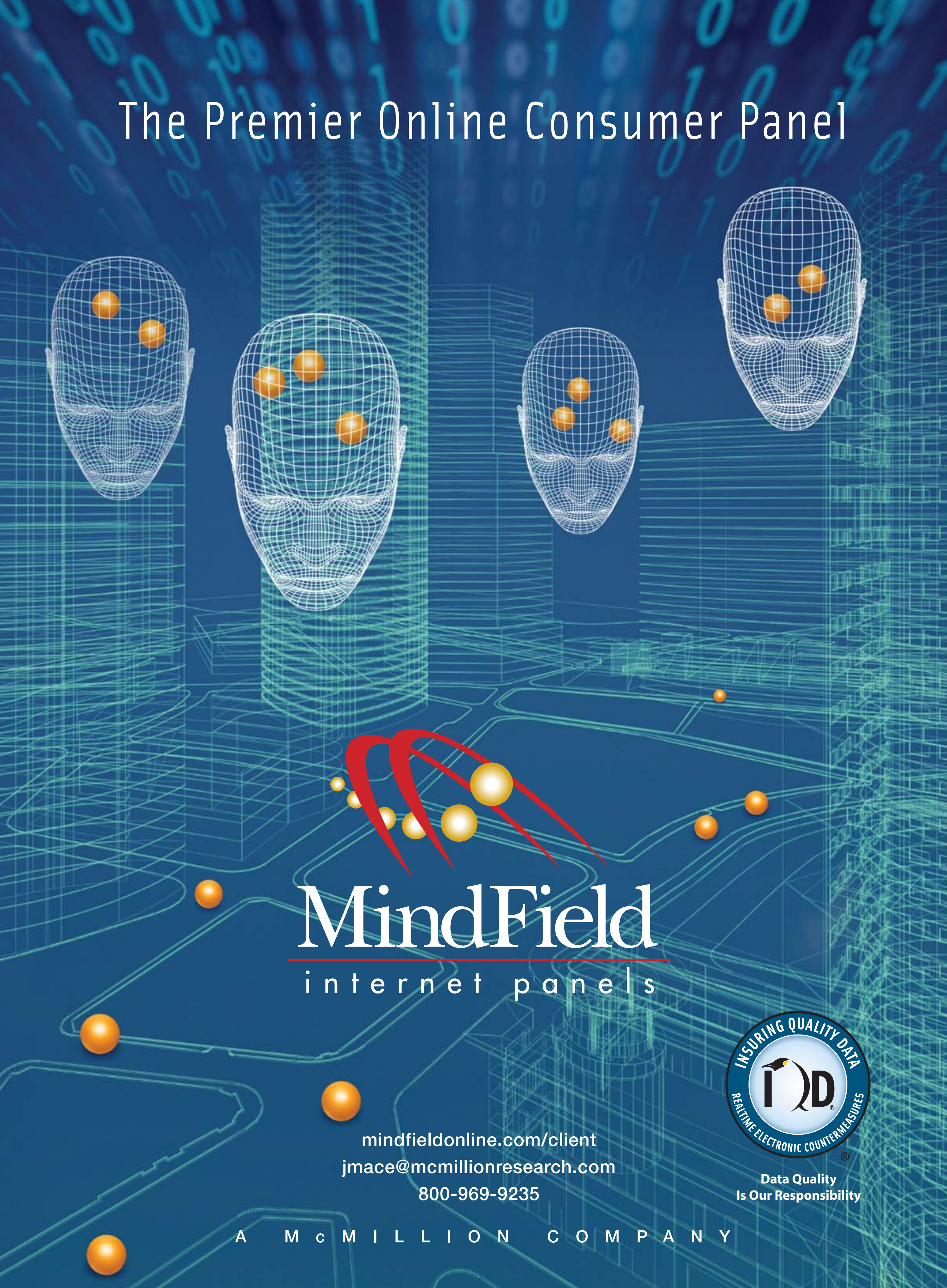
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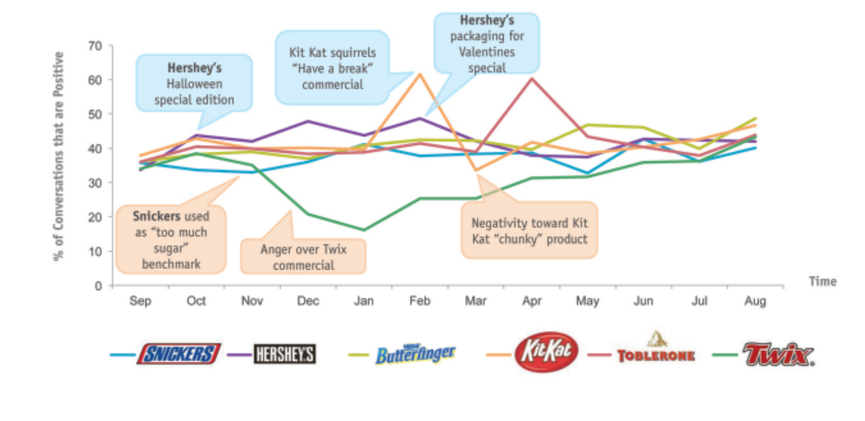


makes that possible like never before. But with great power comes great responsibility: It also raises expectations among consumers that a brand will respond to undercurrents of discontentment or waning loyalty. Just imagine if New Coke had been launched in the era of social media.

Stay in sync

Assuming that brand success depends on allowing consumers to drive the development of new strategies, there is a growing need to listen more closely and stay in sync with consumer perceptions. To that end, social media listening picks up where classical research falls short. While classical research entails asking predetermined questions of targeted groups of consumers, social media research is an ideal method for gathering unfettered brand perceptions. Prompting consumers with questions (often created by brands themselves) introduces bias and inherently limits their value. Social media listening – while constrained in its ability to provide guidance and structure to conversations – can elicit more candid and possibly more authentic feedback. One is less likely to be surprised by the answer to a predetermined question than to be caught off guard by a comment overheard on Twitter.

Social media conversations are useful for understanding a brand's consumers; their perceptions of the brand and how are they expressed online; what triggers them to speak about the brand and for deriving communication recommendations or messaging strategies.

A true measure?

One could assume that volume is indicative of brand popularity, especially in a competitive context. But is volume a true measure of loyalty and positivity? To deepen the understanding of consumers' subconscious perceptions towards brands, it is critical to evaluate how consumers view the brands' functional characteristics, how they connect with them emotionally and what personality the brand stands for. Such elements are trickier to deduce from traditional Q&A since respondents are less likely to speak authentically. But within social networks, deeply emotional insights can be interpreted with more certitude because they are coming from spontaneous and truthful conversations.

In order to understand and categorize the types of conversations happening around these brands, a two-by-two framework was developed to plot sentiment and passion around a collection of perceptions (taste, efficacy, value, etc.). Sentiment is the range of conversations going from less positive to more positive. Passion represents the intensity of the conversations, differentiating the like and dislike from the stronger emotions of love and hate, respectively.

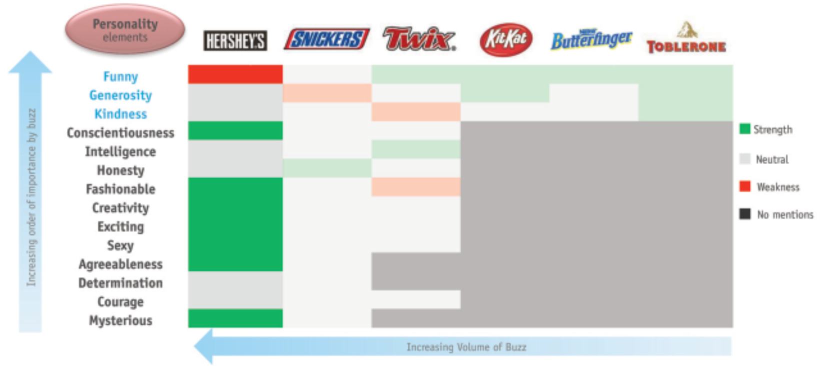
Social media listening (as opposed to monitoring) enables brands to measure the positivity and strength of conversations, as well as the relative volume of conversations regarding certain brands. In this case, strength could also be described as passion. How passionately does a consumer speak about their love or contempt for a particular brand or experience? By failing to consider the strength of a statement, social media monitoring programs can miss important nuances and valuable insights.

If a brand is talked about with high positivity and high passion, it's in a brand's best interests to try to sustain equity among consumers. Low passion and high sentiment indicates the need for brand revitalization, perhaps a booster shot of brand excitement. Similarly, if the sentiment is low and the passion is low, a more significant brand overhaul may be in order. The most challenging brand position is that of high passion and low sentiment, as this indicates that consumers actively dislike the brand or some experience they've recently had in relation to the brand, such as a poorly received television commercial or failed spinoff product.

Conscious and subconscious

In evaluating consumer comments regarding chocolate brands, researchers looked at both the conscious and subconscious perceptions as they were revealed through social media research. They examined three major categories: emotional benefits (the way a brand

Figure 3



makes you feel); personality elements (a human characteristic used to describe the brand); and functional benefits (the desired efficacy of the brand).

The combination of these sentiments drives a consumer's preference toward a certain brand and away from others and it is interesting to see how these perceptions shape the online brand identity. Using the two-by-two framework to organize and rank social media comments based on a list of conscious and subconscious characteristics, a more nuanced perspective of the online brand identity can be uncovered. The three elements reveal what consumers seek the most from their chocolate and which brands score highest in these characteristics.

Regarded with less passion

The findings of this study showed that more talked-about brands were often regarded with less passion, while those occupying a smaller share of conversational volume were talked about with more positivity and passion.

Specifically, the research emerging from this case study showed that many of the larger, more widely-known brands are more negatively perceived regarding key elements of taste or fun – both critical factors in the enjoyment of chocolate bars. This disparity between the perceived and intended identity of a brand is crucial. For some brands, the difference is negligible; for others it nearly undermines the brand foundation. Empowered by this reality check, a brand can create and deploy strategies to close the gap and mitigate the volume of conflicting conversations.

Take the example of Snickers. Its tagline "You're Not You When You're Hungry" is intended to leverage the brand's foundational brand message that Snickers is a satisfying snack. But significant social media buzz portraying Snickers as a "candy" and as a benchmark for sugar content challenges that brand strategy (Figure 1). Armed with new and valuable insight regarding brand perception, marketers can develop strategies to overcome disconnects between what brands say and what consumers feel.

Research Company Spotlight - Social Media

Below is a list of firms from our Researcher SourceBook™ specializing in social media.

Amplified Analytics
415-742-2580
www.amplifiedanalytics.com

Authentic Response, Inc.
1-888-AR-PANEL
www.authenticresponse.com

Bellomy Research, Inc.
800-443-7344
www.bellomyresearch.com

Blackstone Group
312-419-0400
www.bgglobal.com

Blueocean Market Intelligence
602-441-2474
www.blueoceanmi.com

Cascade Strategies, Inc.
425-643-9789
www.cascadestrategies.com

Clarabridge
571-299-1800
www.clarabridge.com

DataPrompt International
312-423-4100
www.datapromptintl.com

Decision Analyst » SEE AD p. 45
817-640-6166
www.decisionanalyst.com

Deep See
914-948-8833
www.deepseeresearch.com

Digital Research, Inc. » SEE AD p. 9
207-985-7660
www.digitalresearch.com

Discovery Research Group
800-678-3748
www.discoveryresearchgroup.com

Doyle Research Associates, Inc.
312-863-7600
www.doyleresearch.com

EmPower Research
646-472-7908
www.empowerresearch.com

evolve24 » SEE AD p. 11
314-965-1777
www.evolve24.com

Focalytic
800-678-3748
www.focalytic.com

Intact Qualitative Research
415-400-5945
www.intactqualitativeresearch.com

IntelligenceBank Pty Ltd
61-3-8618-7803
www.intelligencebank.com

KL Communications, Inc.
732-224-9991
www.klcommunications.com

Localspeak
646-370-4987
www.localspeak.com

M/A/R/C® Research » SEE AD p. 35
800-884-6272
www.MARCresearch.com

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

Medallia, Inc.
650-321-3000
www.medallia.com

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

Nimbus Online, Inc.
425-643-0791
www.mynimbusonline.com

On Point Strategies
515-314-6568
www.on-pointstrategies.com

PhaseOne Communications
310-242-9779
www.phaseone.net

QuestBack Group, Inc. » SEE AD p. 24
203-690-1052
www.questback.com

Ramius
888-932-2299 x233
www.ramius.net

Reconnaissance Market Research
877-732-6667
www.ReconMR.com

Research Now » SEE AD front cover
888-203-6245
www.researchnow.com

RitterAssociates
419-535-5757
www.ritterassociates.com

RTi
203-324-2420
www.rtiresearch.com

Savitz Research Solutions
972-386-4050
www.savitzresearch.com

SKIM
201-963-8430
www.skimgroup.com

Study Hall Research, Inc.
813-849-4255
www.studyhallresearch.com

Video Chat Network
914-722-8385
http://videochatnetwork.net/index.php

Voxco (Voxco Group)
514-861-9255
www.voxco.com

W5
919-932-1117
www.w5insight.com

Peaks of positivity

Another way to understand brand perception is to see how volume, positivity and passion vary over time. Social media monitoring is an especially powerful tool for seeing the peaks of positivity and valleys of negative sentiment overlaid to external events such as holidays and new product launches.

Large brands might leverage these opportunities to create niche, targeted communications and marketing materials that leverage a spike in seasonal and holiday sentiment (e.g., Valentine's Day and Halloween). This not only allows them to leverage a time-based opportunity but they can further capitalize on their large conversational volume share. In fact, brands can even create a spike in positive conversations when marketers understand the drivers through this type of perspective.

For example, Hershey's does well around Halloween and Valentine's Day (Figure 2). Kit Kat, on the other hand, did extremely well in February, coinciding with a new advertising campaign, but bottomed-out in March when the brand launched a poorly-received chunky product. In this instance, social media provides a real-time, honest view of how brand actions immediately impact brand perception.

Make them feel happy

Taste is overwhelmingly the most important characteristic that consumers seek from their chocolate bar. This study revealed that smaller niche brands are perceived as tastier than larger brands. Similarly, the analysis validated an intuitive thought that consumers want their chocolate to make them feel happy. In this competitive landscape, the smaller Toblerone owned the happiness factor whereas other brands have opportunity for improvement.

Among U.S. consumers, "funny" is a personality trait most valued in a chocolate bar. It's probably not surprising to most Americans that Hershey's, with its staid packaging and established legacy, scores low on the "funny" factor but high on conscientiousness (Figure 3). Does this mean that Hershey's should try to be funny? Or that it should leverage its legacy as the trusted, conscientious choice among chocolate bars? Empowered by new consumer insights such as these, marketers are better prepared to make those decisions.

It's great to know truthful and current insights about your brand. A good social media research study can provide all of those. But as a marketer, these nuggets of truth are useless until something more actionable is achieved.

Unproven territory

Social media research may still feel like uncharted and unproven territory but it can and should be approached with the same expectation of value as any other research method. When social media insights are gathered using a model that ensures integrity and relevance, the results can shape strategies around sales and distribution, marketing and advertising, packaging and, of course, social media communications.

Social media research is also a powerful complement to existing data sources. Combined with sales and distribution data, for example, one might ask how the volume of conversation around a particular brand aligns with sales and distribution strategies. Or, one might explore how spikes in sentiment align with advertising messaging and channel investments.

A holistic consumer persona, developed by the consumers themselves through social media, gives marketers better intelligence from which to craft great marketing strategies. The opportunity to learn how a brand is truly regarded among consumers – whether expected or surprising, pleasing or disappointing – should always be valued. And through social media, researchers and branding professionals gain unfettered access to the bittersweet truth.

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●●● social media research

Learning from fans

Using social media as the next step in CRM

| By Suresh Subbiah

snapshot

Using a professional power-tool provider as an example, the author discusses various social media campaigns for gathering customer insights, along with the supporting technology and platforms.

Gone are the days where a brand's social media value lies in the number of fans or community members it possesses. True value comes from what insights can be revealed through social media and what a company does with them. It's time for companies to ask themselves, "Who are our fans? What can they teach us about our brand?"

While many companies have a social media presence, this approach represents a dramatic shift in corporate interest around engaging communities effectively. Marketers everywhere agree there is a vast pool of customer data that can be culled from social networks but few have realized how to turn that data into action.

Traditional enterprise feedback management (EFM) enables organizations to centrally manage surveys and establish real-time dialogue with employees, partners and customers around key issues and concerns. Organizations then use this feedback and potentially make customer-specific interventions, as the event happens, that increase customer satisfaction, loyalty and lifetime value. With the rise of social media, many question whether it is a threat to EFM as we know it. I would argue it's actually the opposite. Garnering feedback through social media can serve as a valuable add-on to traditional feedback systems.

Push beyond monitoring

According to Gartner, 2012 spending on social applications for sales, marketing and customer service processes will surpass $1 billion worldwide. If you search the term "social CRM," a whole host of definitions will pop up but one central theme is clear: customer engagement. While there is no doubt that social CRM is a key growth area for the future, for businesses to truly capitalize on its benefits they need to push beyond monitoring for relevant mentions of their product and brand to pick up on feedback and reactions. Social CRM also includes dialogue and customer communities managed by organizations.

By integrating feedback platforms directly into the social networks where customers

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already gather and interact, brands can listen, connect and engage through many methods.

Customer advisory boards

Enabling enthusiastic and influential fans to share positive feedback can play a major role in product testing, concept testing and shaping new product innovation. The first step in the process is to determine shared values between your company and its customers. Aligning the company vision with an idea your customers can relate to will increase the likelihood they connect with the brand and encourage brand evangelism. Creating customer advisory boards to harness this resource can lead to successful launches of new products.

Usage and attitude research

Once a company has identified its brand ambassadors, it can dig deeper and understand who its customers are and their interests. Using interactive forums and nontraditional surveys via social channels is an important part of providing a unique customer experience and can help give a clear picture of the customer. This tactic also provides an avenue to share feedback without ever leaving the site, increasing customer likelihood of participating in surveys or commenting in forums.

Social CRM provides a new way to understand customers that allows organizations to take an active role in monitoring digital behavior and sentiment. It also enables organizations to analyze customer participation and inform future interactions, product development and brand strategy.

Viral marketing

As companies use social media to build customer relationships, they also gain a better understanding of what content and services will be most appealing. Giving customers content they love and can relate to increases loyalty and the chances they will share their brand experience with their community.

Ultimately, loyal customers want to connect with the brand or company. In today's social world, there is a greater need for organizations to stop only pushing a predetermined message and start cultivating and engaging advocates who champion brands to others; provide real-time feedback and recommendations; and actively participate in the innovation process.

Create real value

With the advent of the social media revolution, customers are gaining a stronger share-of-voice and forever impacting how brands interact with consumers. With more than 901 million active monthly users on Facebook, it is clear that establishing an authentic and engaging voice in social media is critical for businesses. This begs the question: How can brands create real value from social networks?

I'd like to share an example from one of Europe's leading professional power-tool providers. After market research findings showed that recommendations between colleagues was a big contributing factor to the company's sales success, it decided to focus on cultivating its social networks and provide brand fans and brand ambassadors an environment to share recommendations and experiences with each other.

A two-pronged approach

The company took a two-pronged approach to the project: 1) building an online professional community to target existing customers and 2) creating a Facebook fan page to engage potential customers who were familiar with the company but had yet to purchase tools.

As Facebook was unfamiliar territory for this company, the primary goal of the project was to measure its marketing impact. Specifically, the company wanted to answer the following questions: Are we reaching new target groups? How valuable are our Facebook fans compared to our online community? How much overlap is there between Facebook and the professional community?

To do this, the company deployed a software solution that integrated with Facebook and provided its marketing and research teams with a private channel to communicate with consumers directly within its fan page. Armed with the ability to go far beyond quick polls, the company used surveys and interactive forums to gain insight into the attributes, actions and attitudes of its fans. It combined quantitative and qualitative market research methods to gather knowledge for effective social media marketing. Additionally, it verified that it is reaching the correct target group on Facebook and also directly communicated with valuable customer segments to better understand their needs.

In the end, the company found that both the Facebook campaign and online community are necessary to reach its key audience. A surprising fan base was revealed through the Facebook fan page – woodworkers. This unexpected insight into its customers allowed the company to develop a strategic campaign targeting this group. The company also determined that only 11 percent of its social media users are active on both its online community and Facebook, validating that the project did reach new audiences. Leveraging social media tools that provide insight into its customer base and analyze their activity has allowed this company to design new initiatives for current and future customers.

Age of the customer

Pairing an excellent product or service with accessible customer service and a catchy marketing campaign is no longer enough to stand out from the competition. We are in the age of the customer and social media has fundamentally changed the way customers seek and share information. As a result, brands no longer have complete control over their image and need to start engaging with customers on the channels they feel most comfortable.

Monitoring the customer experience in real time can set organizations apart from the competition and build loyalty. Consistent organizational transparency both across traditional and social networks can ensure that customers feel valued every step of the way and guarantee positive feedback. To ensure this happens, organizations need real-time understanding and tools to capture feedback on a real-time basis. In the experience economy, organizations need actionable insights and feedback to stay competitive and become winners.

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••• the business of research

Perks are only part of it

Why are some research companies great places to work – and others lousy?

| By Simon Chadwick and Lock Collins

snapshot

Cambiar's Employer Brand study sheds light on how research firms can attract and retain employees.

We are all familiar with the concept of a corporate brand – that amalgam of attributes and feelings that make up the overall image and personality that a company projects to the outside world. But what about the brand that it projects internally? What about the attributes and feelings that it engenders in the people who actually work there or, indeed, who might think about working there in the future? At Cambiar, we call this a company's Employer Brand.

Just like an external brand, an Employer Brand is made up of attributes that are both hard and soft. The hard ones are things like salaries, compensation programs, health benefits and those extra benefits and perks that companies sometimes do or don't offer. The soft ones relate more to things like management culture, the presence of a clearly defined and communicated strategy and the work environment.

Generically, there are many studies that, in one way or another, measure Employer Brand. Just think of the "best place to work" studies and awards that abound in various states and cities. But until now, there has never been a comprehensive study of Employer Brand in the market research industry. What makes for a great MR Employer Brand? And what makes for a truly challenged one? Cambiar set out to find out with its first-ever National Employer Brand Survey – an online survey of 430 employees (of all ranks) in firms involved in providing market research services throughout the country. (Cambiar is indebted to Quirk's for their assistance in carrying out this study.)

To arrive at a good, composite understanding of the Employer Brand of any one respondent's company, Cambiar devised an algorithm to derive an Employer Brand Score (EBS). Based on a hypothetical top attainable score of 100, the reality is that most firms score somewhere between 40 (a score that we determine to be "life threatening" to the company) and 75 ("outstanding").

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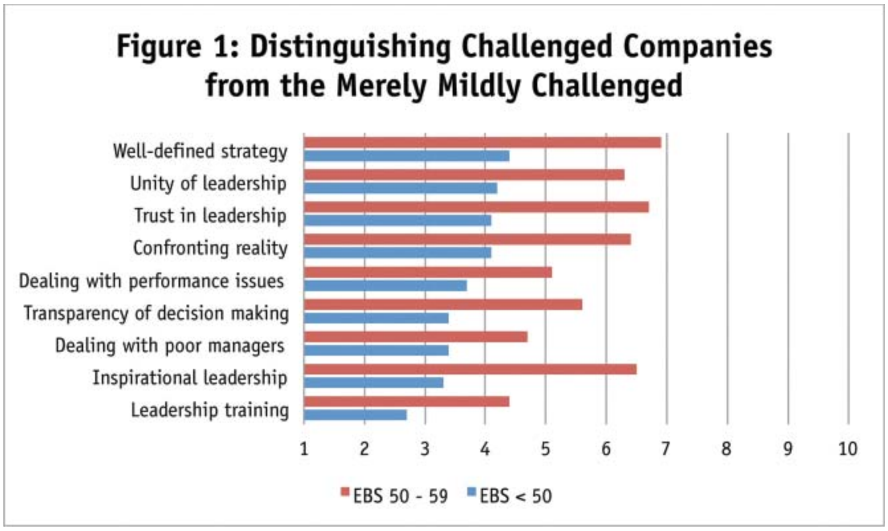
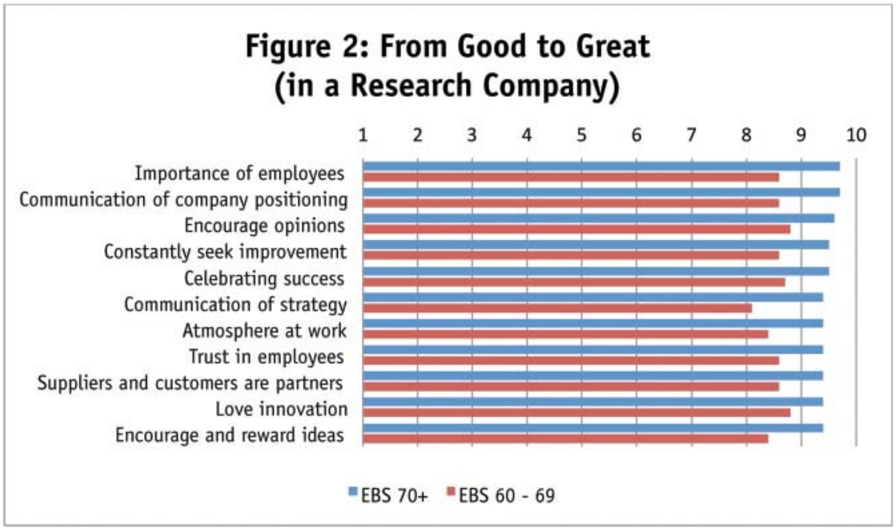




Disturbing to see

So how did "Research USA" fare on this scale? Not terribly well. The average EBS given by respondents to the companies in which they worked came to 56.3 – a level we would categorize as "good, but could use some work." While 46 percent of firms were rated as excellent or outstanding on an EBS basis, it is disturbing to see that nearly a third of our respondents scored their firm 50 or below – a level we would characterize as "challenged."

Put another way, nearly a third of the research employee population in this country works for lousy companies (at least, that's the way they see it). So what makes these firms so challenged?

First, let's dispense with one artifact of a survey like this: If you work for a company that you think is challenged, you will score it "down" right across the board on hard and soft attributes alike. Similarly, if you really love the company you work for, you will score it "up" right across the board. So, being aware of this halo effect, we looked for those areas where the challenged companies really stunk and where the great ones really shone.

What makes a challenged company challenged? The answer is simple: lousy leadership. More than anything else, research firms scoring an EBS below 50 lack leadership in pretty much every respect. These companies have untrained leaders who are unable to inspire; are not trusted by their staff; cannot confront, or deal with, reality; lack unity and lack a well-defined strategy. Being bad leaders, they make decisions in ways that are not transparent and don't deal with performance issues on a timely basis, let alone poor managers.

We also noticed that basics such as an orientation program for new employees and performance management programs that are tied to strategy and are appreciated by employees and management alike are missing from such companies. The upshot is a company that gives its employees plenty of reasons to leave.

So what is the difference between a truly challenged company as seen through the eyes of its employees as opposed to one that is OK but could use some serious work? As we can see in Figure 1, these latter research firms (EBS 50-59) have some of the same management problems as their more challenged peers (not dealing promptly with performance issues, for example) but are at least blessed with leaders who are more likely to have a well-defined strategy, are inspirational, are unified and can confront some measure of reality. As such, these leaders are more likely to be trusted.

Decent leadership, then, goes some way to mitigate bad management. However, this is obviously not enough to make a research company truly great. What does distinguish an outstanding research firm from its peers? While it is true that companies scoring an EBS of 70+ turn all of the above woes on their heads and really do provide inspirational leadership, it turns out that this is not sufficient to make them great. What really makes them great is what they do with that leadership.

Openly trust

According to our respondents – who, remember, are rating their own companies – a great research firm will consistently (as opposed to intermittently) emphasize the importance of its employees, encourage their opinions and ideas and openly trust them. Leaders demonstrate this by communicating company strategy and where they see the firm fitting into the marketplace and by celebrating shared successes.

A great company is also one that puts innovation front and center, treats suppliers and customers alike as partners and is constantly seeking to improve itself (Figure 2).

Great research companies get all the basics right and have inspirational leaders. But the real secret is that these leaders live and breathe the notion that employees are at the center of the ecosystem of success.

That this is so is borne out by the "harder" attributes of a great Employer Brand. Great research companies do not necessarily differ too much from their lesser brethren in terms of the medical

Figure 3: Importance of Medical Benefits Received (Top 2 Box %)

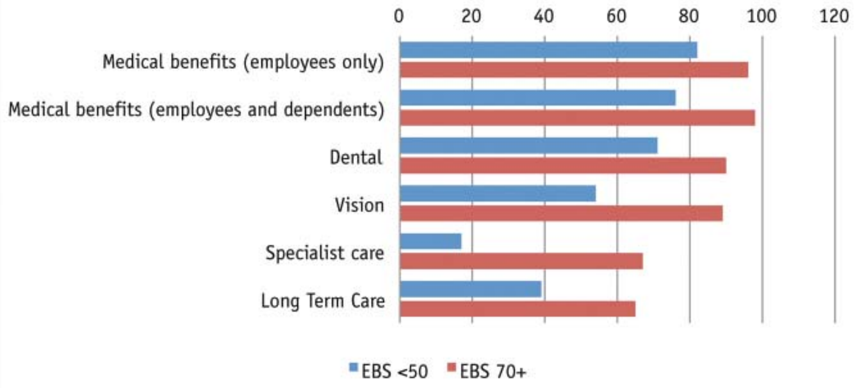
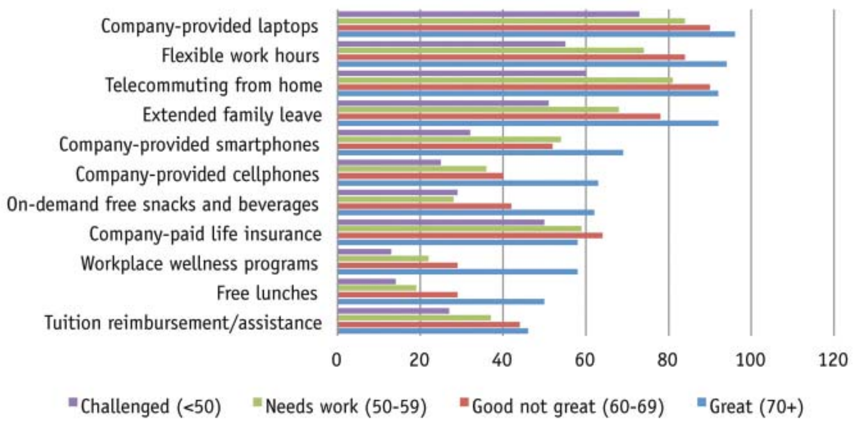


Figure 4: Benefits and Perks



benefits they offer their employees – they differ by offering benefits that are important to their employees. So, while it is true that a great EB company is a little more likely to offer such things as dental, vision, specialist and long-term care insurance to their associates, what really counts is that these things matter that much more to the associates in question. The company listens to its employees and then tailors the benefits to them.

Interestingly, while "challenged" companies may well offer similar benefits, the employees who receive them rate them as less important than do their peers in better firms (Figure 3).

Are these benefits really that much less important to employees of challenged companies? At first sight it would seem so, although perhaps we might speculate here that, if your leadership and environment are challenged, no number of special benefits are going to make up for it. You want the basics fixed first. Once those are in place, you then can appreciate much more the value of the benefits you receive.

The same is true for non-medical benefits and perks. For example, one of the perks that really distinguishes great companies from their peers is the availability of workplace wellness programs. Fifty-eight percent of great companies offer these, as opposed to 13 percent of challenged ones. But even where they are offered in challenged companies, employees rate them very low in terms of importance (18 percent top-two box) whereas their counterparts in great companies rate them very highly (70 percent top-two box). Is it that the provision of such a benefit in a company that is otherwise challenged is clouded by an overall feeling of cynicism that somehow devalues the benefit itself?

Many more benefits

Whatever the truth of the matter, it is nonetheless the case that great companies offer many more perks and benefits than do their counterparts elsewhere (Figure 4).

If you work in a challenged research company, you stand a good chance of getting a laptop and an even chance of telecommuting, flexible work hours and extended family leave in the event of childbirth, bereavements and the like. Since the latter is pretty much mandated by law in many states, we can safely say that the challenged company is thinking more about your productivity and how it benefits the company rather than your wellbeing as a human being.

Contrast this with the great company, where the benefits are oriented not only around your productivity (great companies are not stupid, after all!) but also around your well-being. What is interesting here is that a great company, taken overall, is not that different in the perks and benefits that it offers to a good one. In both you stand an even chance or better of getting free snacks and beverages, a smartphone and even assistance with tuition for further education (good and great firms want smart people working for them). But a great company pushes the boat out just a little further with workplace wellness programs and free lunches. Think of it as a research company operating a bit like the Google Campus.

Interestingly, which of these latter benefits you get depends quite heavily on the size of the company for which you work. If you are in a large research firm, you will be more likely to get a workplace wellness program, tuition reimbursement, retiree health benefits and life insurance. Smaller companies, who perhaps cannot afford such largesse, concentrate on more "environmental" benefits such as free lunches, on-demand snacks and benefits and car allowances. Interestingly, employees of each place much more importance on the differential benefits they receive than do their counterparts elsewhere – so the small company employee finds lunches and snacks more important than her counterpart in a large firm, whereas a large-firm employee places more value on things like tuition reimbursement. This would suggest either that these firms are good at judging what would be valuable to their employees or that people gravitate to the type and size of firm that suits them best.

In either environment, flexible working hours and telecommuting from home are incredibly important, suggesting that these have now become costs of entry to being a good employer in the research industry.

A correlation?

Is there a correlation between size of company and its performance on the Employer Brand Score? Not really. The average EBS ranges between 54 and 58 across all sizes of firm. Rather, it is the difference in what drives the EBS in companies of different sizes that counts:

- Smaller companies do much better on leadership and environmental issues – their leaders are more likely to be seen as inspirational; are more likely to be trusted and more trusting of employees. They are more employee-centric and give their employees fewer reasons to leave.
- Bigger firms do less well on these attributes. Decision-making is more opaque, there are more management layers and they don't trust their employees as much as smaller companies do. On the other hand they are better at training their management, at orienting new employees and at defining their strategies.
- Where bigger firms tend to catch up on their smaller counterparts in terms of their EBS is in the range and value of benefits that they offer. However, this appears to be less "sticky" where employees are concerned, and does not prevent them from leaving or from looking over the fence at where the grass is presumably greener. Employees in larger research firms are more likely to cite other companies at which they would like to work (step forward GfK, Maritz and BrainJuicer), while employees at smaller firms are more likely to say that there is nowhere else that they would wish to work.

Divorced from reality

Finally, we wanted to know if there was a difference in the way in which management perceived their firms as opposed to their non-managerial employees. The answer, surprisingly, was no. The average EBS for both groups was identical (55). This would suggest that most managers are as aware of the conditions inside their companies as their employees are. There is, however, one exception: CEOs. The average EBS for CEOs is 63, suggesting that most of them think their company is pretty darn good.

The big question here is: is this just puffery, with the CEO deliberately "talking up" his firm in the survey, or does it suggest that many CEOs are rather divorced from the reality of what goes on in their companies? The answer, we suspect, is a bit of both. Certainly, our experience would suggest that there are many CEOs who really are blind to the facts of life in their firms, while there are also those who are not beyond a bit of skullduggery to lift their firm's average score. Either way, we view Employer Brand as a useful tool for those CEOs who really want to know how their employees view the firm from the inside – and how to improve conditions to the point where employees become advocates for the firm and people outside it want to join.

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••• research software

Unprepared for the future?

A report on the Confirmit Market Research Software Survey

| By Tim Macer and Sheila Wilson

snapshot

The annual study of research software users finds curious levels of resistance toward smartphone-using respondents and a growing need for skilled data visualizers.

Technology has never been more important to market research than it is today. Our annual survey of software and technology at research companies around the world has revealed an ever-broadening choice of research methods and technologies in everyday use, facilitating research and delivering the results. Yet our survey has also uncovered some disturbing lack of preparation among research companies for the sweeping changes that technology is making to the world, particularly in the areas of data visualization, text analysis and the growing phenomenon of respondents taking online surveys on smartphones.

This annual survey is carried out by meaning ltd and includes the views of technology decision-makers and influencers at 230 research companies in 36 countries. Sample is selected in proportion to the amount of research carried out in each country, according to ESOMAR's Global Market Research Report. Results are presented un-

Figure 1: Percentage of Market Research Firms Using the Main Modes of Research

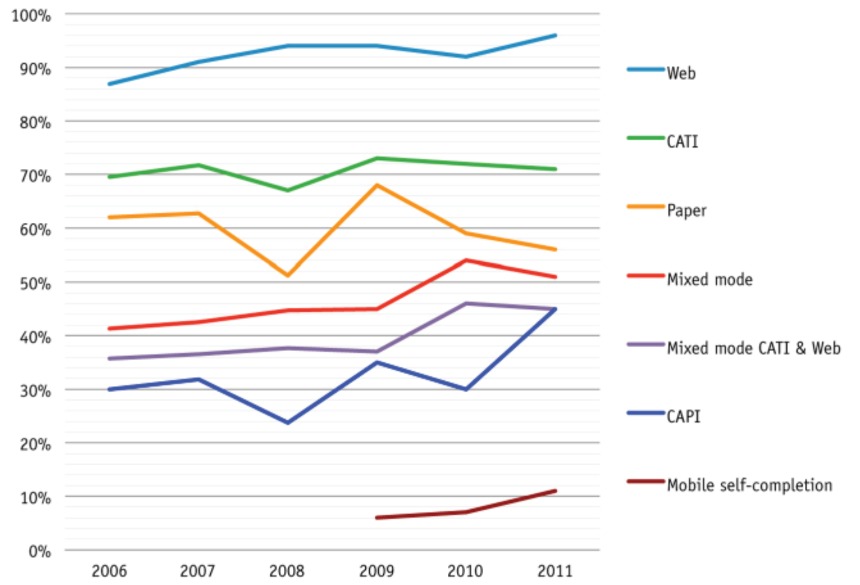
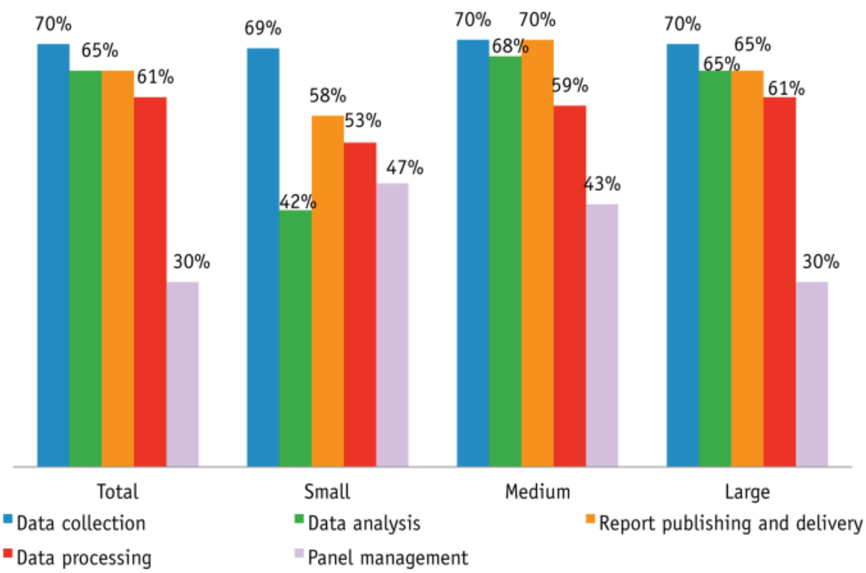


Figure 2: Software Due for Replacement, by Company Size, Based on Those Intending to Change Their Software Over the Next One to Two Years



weighted and we advise that you consider all figures reported to be indicative in nature and not use them as a basis for projections.

Here, we present some of the highlights of the 2011 study. You may also download the full report at meaning.uk.com/mrss.

Research modes offered

Each year we ask about the proportion of market research companies offering each of the principal modes of research. Mobile self-completion was introduced as a mode in 2009.

When online research reached passed the 90-percent level of penetration in 2007 it looked as if it this mode was close to saturation point. Since then, it has reached 96 percent. We also asked for volumes of research conducted by each mode (not shown) and by our estimates, half the world's research is now done online.

Asked about where the trends will go next, companies are still optimistic that Web research will continue to grow fairly strongly. The only other mode tabbed for strong growth is mobile self-completion. CATI and paper are predicted to decline and most other modes to remain level or grow modestly. While CATI and paper have both been slated for a decline for several years now, it is only paper that has shown any decline over the years; CATI volumes have remained static, making it rather more resilient than research firms have been anticipating.

Once again the survey has failed to show that mobile research has gained any real traction yet among research clients. By 2011, this was offered by 11 percent of companies, but the volume of work passing through this mode was under 0.5 percent of total quant revenues.

Software upgrades

Every year, we ask if companies have plans to change their software over the next one to two years and if so, what they intend to replace. Each year, we report a surprisingly high proportion of companies that are looking to change their software. In 2011 this measure surpassed all previous estimates and reached an astonishing 46 percent of companies intending to bring in something new. Some interesting differences emerge when broken down by company size: 55 percent of large companies will be looking for new software, as will 50 percent of medium-sized companies but only 40 percent of smaller companies.

Figure 2 shows what software is slated for replacement, based only on those stating they intend to replace some of their software. Small and medium-sized companies are far more likely to have plans to change their panel management software than large companies. In previous years, we have reported that large companies have dominated the move to proprietary panels, often using their own custom-developed software. We suspect we are seeing the smaller firms now seeking to expand into this area too.

New data collection software comes at the top of everyone's wish list, with little variation between companies of different sizes, but there is a much greater desire to seek out new data analysis and also report-publishing tools among the larger firms.

We read these high values as an indication of dissatisfaction with

Figure 3: Approach Toward Smartphone Users When Designing Online Surveys

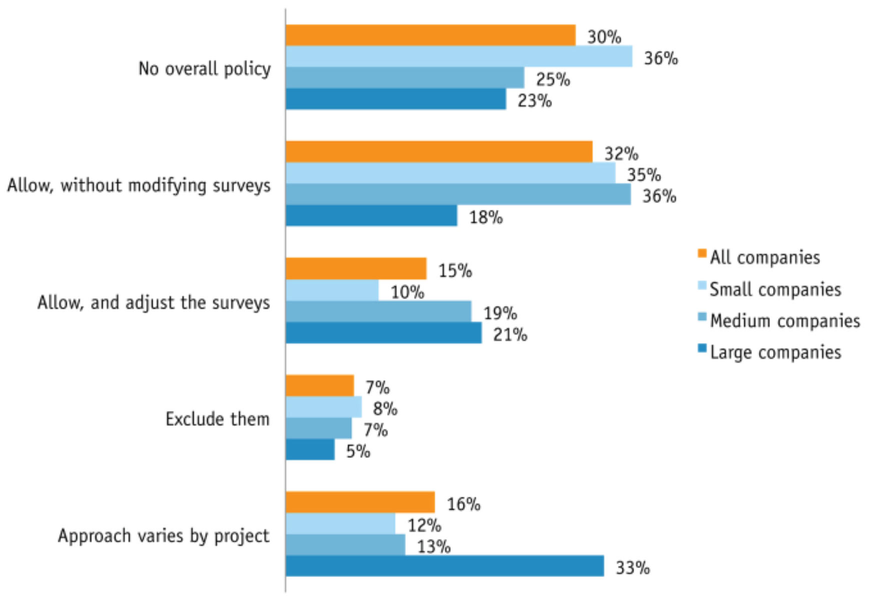
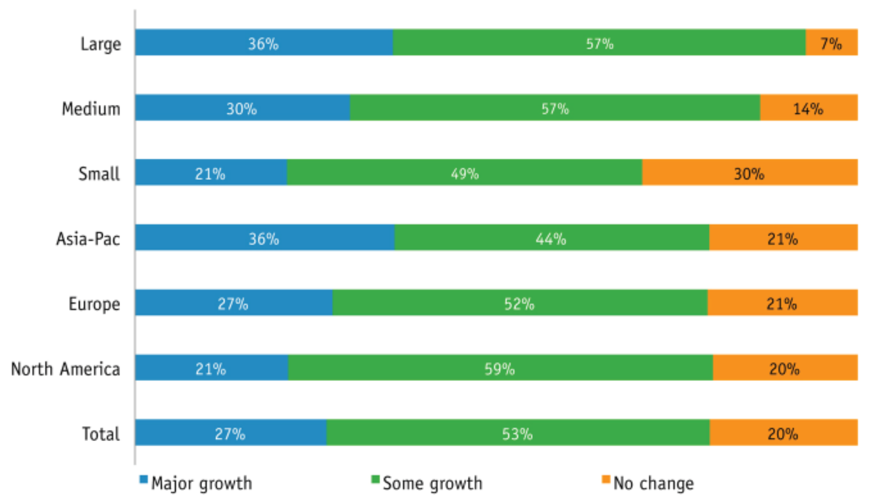


Figure 4: Growth in Demand for Data Visualization Beyond Simple Charting



some of the tools currently in place and speculate that there is some frustration among research companies with the development trajectory in some of the more established software tools.

Views on mobile survey takers

Figure 3 contains information that no research company doing online research can afford to ignore. With so many people now owning smartphones and a growing number choosing to take Web surveys on them, we wanted to know how market research companies were facing up to this disruptive phenomenon in their survey design.

We were taken aback to see that so many market research companies are excluding mobile survey takers from their surveys. While only 7 percent state they actively block mobile survey takers – which in itself is not a neutral decision from either a sampling or respondent cooperation standpoint – the 30 percent who have set no overall policy and the 32 percent who allow them in without modifying the survey will be excluding all but a handful of respondents. Surveys do not auto-optimize to present themselves on small screens. In fact, optimizing surveys involves effort and cost, and the rather bloated surveys that have become commonplace in online research do not translate well to mobile.

We did also provide another option that has been discussed at industry events: to route participants to a specific survey designed for mobile participation. This appears not to be used by research firms at present as nobody selected this option.

In a separate question, we obtained firms' estimates of how many participants were typically attempting their surveys on smartphones and other mobile devices. An overall level of 6.7 percent across the whole sample breaks down to 9.4 percent for large companies, 7.1 percent for mid-size companies and 5.4 percent for small firms.

As it happens, our survey had been optimized for mobile, but only 3.5 percent chose this route. The proportion on any survey does appear to vary widely both in relation to how tech-savvy the group is and also how habituated they to taking surveys. Anecdotally, we hear panel members are less likely to use smartphones to respond than on some general-population or customer surveys where the proportion is much higher. We suspect our own sample was also habituated to using a PC to respond.

For online research, this is disruptive technology at work. A rapidly increasing proportion of e-mail traffic is now being opened and read only on mobile devices. E-mail messages with an embedded link to a survey remains the most prevalent means to invite respondents to a survey. Online research practice needs to change quickly, in order to move with the times and turn what is starting to look like another threat into an opportunity.

Technology for data visualization

We asked our survey participants how much growth they were expecting in data visualization that goes beyond simple charting. It is very clear from this chart that companies of all sizes in all regions are experiencing growth – especially large companies.

To produce the more informative, imaginative visualizations, market research companies would be better off turning to dashboard tools and

Figure 5: The People Who Create Visualizations, By Region

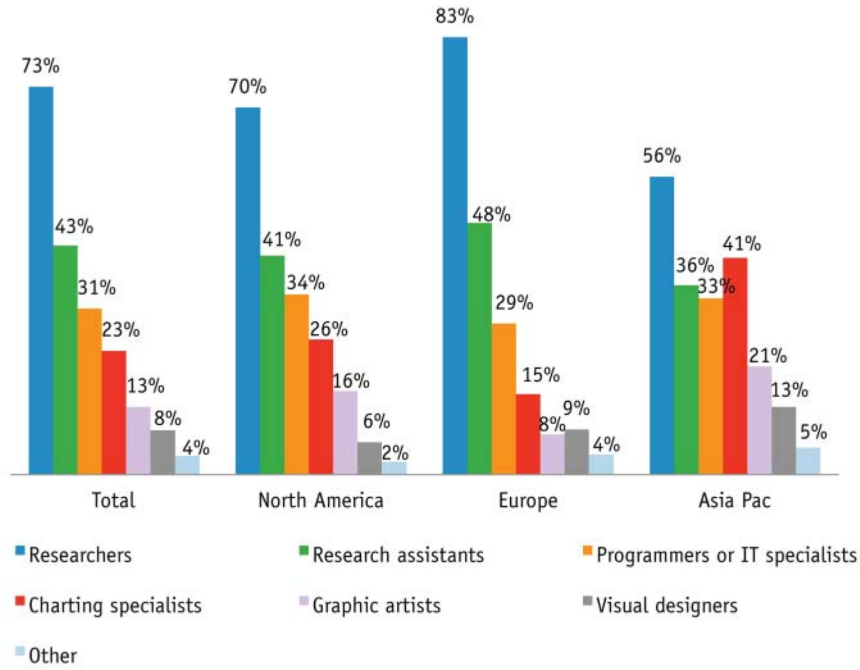
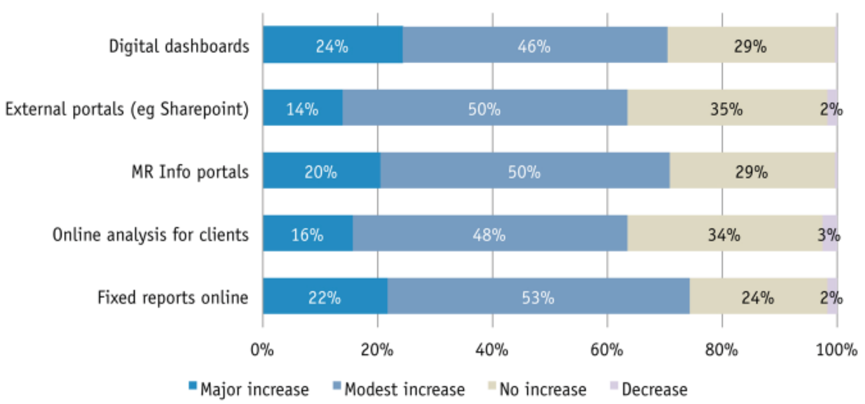


Figure 6: Changes in Demand For New Ways of Delivering Results



specialist charting tools than relying simply on Excel and PowerPoint. Here too, research companies seem ill-equipped to deal with the challenge. In another question we found that only about a third (34 percent) are turning to specialist dashboard software and even fewer (20 percent) ever use specialist charting software. Nearly all companies (96 percent) claim that they are using Excel and PowerPoint for almost all of their data viz work. Not only are these tools not up to the task – which many respondents admitted, in an open text question – but it is not the approach used by other data providers, consulting firms or publishers, where a range of tools tend to be used.

Who produces data visualizations?

Creating top-quality, imaginative visualizations is a specialist skill and requires more than just specialist technology. So, we asked who within market research companies produces data visualizations.

In all regions, researchers are most likely to be creating visualizations but it looks as if companies in Asia-Pacific have taken steps to engage more specialists such as charting specialists, graphic artists and visual designers.

This apparent lack of specialist skills, especially in North America and Europe, may be a clue as to why so few companies have the confidence to move beyond Excel and PowerPoint. However, to move forward, market research firms need to focus not only on the technology but in acquiring or developing the right skills to communicate data more effectively in visual form.

The future for digital deliverables

We asked companies about their anticipated change in demand for various online results delivery methods. The hotspots for growth identified are in the area of dashboard delivery, closely followed by fixed online reports and portals.

However, this contrasts with current practice revealed in another question, which shows that the most prevalent delivery methods are largely unchanged over the last five years. PowerPoint continues to dominate as a publishing as well as a presentation method: It is used to deliver 53 percent of all projects. Following this comes Acrobat (20 percent) and Microsoft Word (17 percent). So the top three are all relatively low-tech delivery methods. Dashboards, although tipped for major growth by our participants, are also reported by them to account for just 7 percent of project deliverables. However, this is not a method that is necessarily appropriate to all projects.

Engagement with new MR methods

The set of techniques referred to as "new MR" seems to have gained real traction in the industry, with our survey participants estimating that a total of 9.1 percent of their research today is based on new MR methods. This figure does vary considerably by company size, with small companies putting this figure at 7.0 percent and large companies 12.3 percent.

We trawled through conference presentations, blogs and reports in the media to identify different kinds of new MR activity and, having identified seven, we asked about the level of activity for each of these. The response shows considerable variation in the popularity of each of these methods. The methods closest to conventional research

Figure 7: Levels of adoption of New MR Methods and Tools

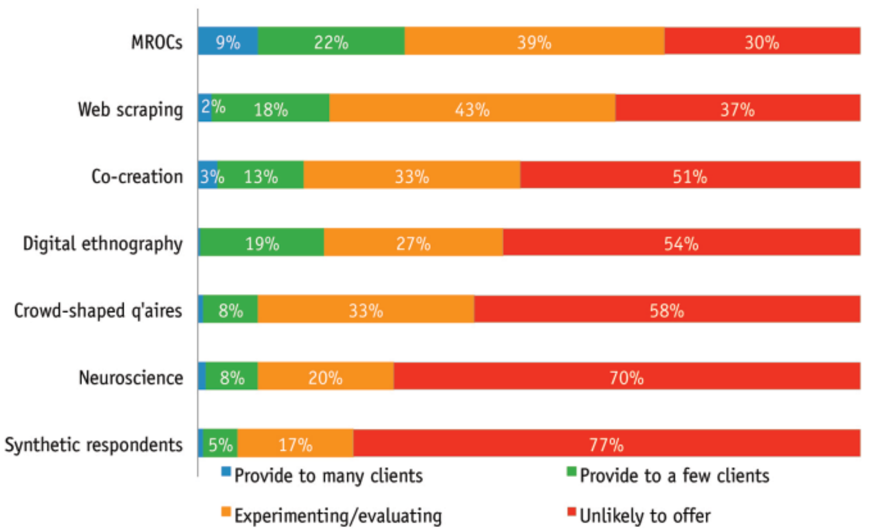
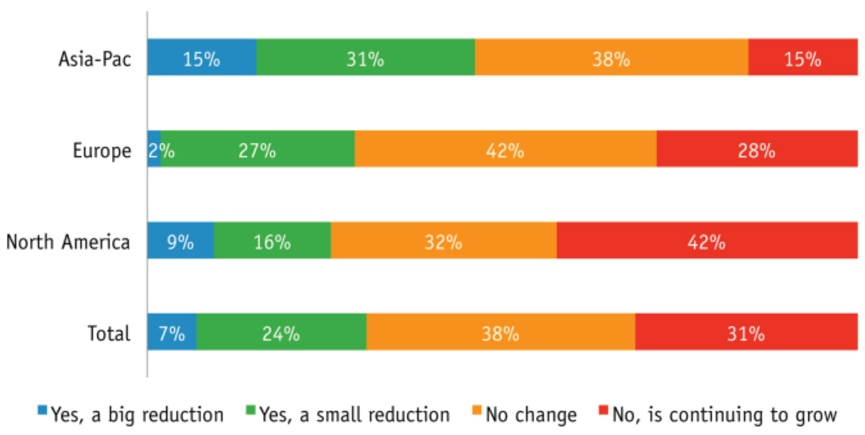


Figure 8: Revenue Trends for Conventional Quantitative Research Work, by Region



– communities and Web scraping – account for most activity. So too does digital ethnography, with one in five firms earning revenues from this, which is another new take on an established method.

Co-creation comes highest among the novel methods; the others appear to be the preserve of specialists. Very few companies are using synthetic respondents (or artificially-created Web bots) that interact through social media sites.

When the methods are broken down by company size, it is again the large companies that dominate the more innovative methods, with the exception of MROCs, which is already fairly extensively used by small companies too.

The effect of new MR on old MR

Not only is new MR now making up a substantial part of the MR repertoire, other questions in our study seem to indicate that new MR revenues are not necessarily cannibalizing conventional quant or qual revenues. Without specifically mentioning new MR, we asked if firms were experiencing any decline in overall revenue for conventional quantitative research. Opinions seem to split into three groups worldwide – almost one-third seeing a drop, almost one-third seeing continued growth and the rest seeing no change. However, in North America, there are many more witnessing continued growth and fewer seeing either reduction or no change.

We followed up those who stated some kind of reduction to ask what they attributed this to. "Business switching to new MR" came third in the reasons cited, behind clients working to reduced budgets and general economic uncertainty.

Tim Macer is managing director, and Sheila Wilson is an associate, at meaning ltd., the U.K.-based research software consultancy which carried out the study on which this article is based. They can be reached at tim@meaning.uk.com or at sheila@meaning.uk.com.

Names of Note

■ Los Angeles research company *MarketShare* has promoted **Dirk Beyer** to executive vice president, chief science and innovation officer.

■ Atlanta research company *CMI* has hired **Bill Douglas** as account manager, consumer and shopper strategy; and **Valerie Deaton** as qualitative manager.


Deaton

■ **Jennifer Romano Bergstrom** of *Fors Marsh Group*, an Arlington, Va., research company, has been elected president of the 2013 Washington-Baltimore Chapter of the American Association for Public Opinion Research Council, Deerfield, Ill.

■ *The Research Partnership*, London, has hired **Darren Kottler** as associate director.


Kottler

■ **Andy Ellis** has joined New Orleans research company *Federated Sample* as senior vice president, corporate development.

■ *The Pert Group*, a Farmington, Conn., research company, has hired **Curt Stenger** as vice president, market analytics; **Jim Lee** as group director, consumer packaged goods; **Ted Clark** as vice president, operations; and **Allison Polanis** as senior analyst, market analytics. Polanis will be based in Kansas City, Mo.

■ *Management Science Associates Inc.*, a Pittsburgh research company, has hired **Armeen Gould** as director, business development, business analysis.

■ **Kimberly White** has been named director of sales at *MarketSight LLC*, a Cambridge, Mass., research company.

■ Zurich, Switzerland, research network *WIN/Gallup International Association* has promoted **Sarah Weil** to director, international research.

■ *The Research Intelligence Group*, Fort Washington, Pa., has promoted **Ron Cosgrove** to president, U.S.; **Robert Kaplan-Sherman** to corporate chief researcher; and **Bruce Shandler** to board member and strategic advisor to the CEO.


Lambert

■ **Jessica Lambert** has joined *Prince Market Research*, Nashville, Tenn., as research associate. The company has also promoted **Robyn Burns** to marketing manager.


Burns

■ **Howard "Bud" Sanders** has joined Norcross, Ga., research company *The Marketing Workshop Inc.* as director, marketing sciences.

■ Cincinnati research company *Burke, Inc.* has hired **Andrew Ma** as vice president, senior account executive, client services; and promoted **Mike Webster** to senior vice president, research solutions.


Webster

■ Saskatoon, Saskatchewan, research company *itracks* has hired **Robert Burron**, **Dale Watts** and **Steve Valigosky** to its account management team.

■ Cincinnati research company *ThinkVine* has named **Elan Long** vice president, product management; and **Gregg Ambach** vice president, analytical services.

■ **Larry A. Walker** has joined *Market Strategies International*, Livonia, Mich., as chief people officer.


Walker

■ **Andrew Appel** has been named president and CEO of Chicago research company *SymphonyIRI Group Inc.*

■ *Insight Strategy Group*, a New York research company, has hired **Stephen Lenzen** as vice president, quantitative strategy.

■ Portsmouth, N.H., research company *Opinions For Good Inc.* has named **Frank Nappo** president and CEO; **Frank Hayden** COO; **Chris Stearns** CTO; and **Archie Ignacio** vice president, client services, North America.

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■ **Rick Reilly** has been named vice president, account strategy, at Horsham, Pa., research company *LRA Worldwide Inc.*

■ **Gasia Kazanian** has joined Los Angeles research company *DB5* as senior brand strategist, quantitative.


Kazanian

■ *Hall & Partners Health*, a London division of New York research company Hall & Partners, has promoted **Lee Gazey** to managing partner. Additionally, the company has promoted **Emily Helm** to research director, U.K.; **Sian Lewis** to account manager; and **Chris Gibson** and **Kat Gridley** to account executive.


Gazey

■ *M/A/R/C Research*, Irving, Texas, has hired **Rick Johnston** as vice president, business development. Johnston will be based in Flemington, N.J.

■ Rotterdam, Netherlands, research company *SKIM* has appointed **Joris Huisman** and **Eline van der Gaast** as new venture directors for the company's San Francisco office.

■ Auckland, New Zealand, research company *Information Tools Ltd.* has hired **Heather Griffiths** as group client director for Coca-Cola and Microsoft.

■ *Delve Marketing Research*, St. Louis, has hired **Wally Balden** as managing director, leading Delve's online division.


Balden

■ *Research Reporter*, Melbourne, Australia, has promoted **Leslie Crist** to global director, client services.

■ *Radius Global Market Research*, New York, has appointed **Darren George** as research director, Radius EMEA. George will be based in the company's London office.

■ **Paul Kirnos** has joined Norwalk, Conn., research company *Bell, Falla and Associates* as senior statistician.


Kirnos

■ New York research company *Ipsos Healthcare* has named **David Twinberrow** head of syndicated services, Asia-Pacific. Twinberrow will be based in Shanghai, China.


Twinberrow

■ Nuremberg, Germany, research company *The GfK Group* has made two appointments in the U.S.: **Ellen Veccia** as chief marketing science officer and **Mike Conklin** as executive vice president, marketing science. Veccia will be based in the company's Palo Alto, Calif., office and Conklin in Minneapolis.

■ London research company *TNS* has appointed **Radhecka Roy** as regional qualitative client leader, Asia-Pacific. Roy will be based in Singapore.

■ **Mirjana Mihaljcic** has been named vice president, North American market panel sales, at Vancouver, B.C., research company *Vision Critical*.

■ London research company *Ipsos MORI* has appointed **Rob Myers** as managing director for Ipsos Marketing in the U.K.

■ **Lalit Sangtani** has been hired as vice president, technology services, at Milwaukee research company *Market Probe*.

Research Industry News

News notes

■ Research companies **itracks**, Saskatoon, Saskatchewan, and **Artafact**, Fremont, Calif., have come to mutually-agreeable settlement terms on the patent infringement lawsuit itracks filed against Artafact in 2008. The terms of the settlement are confidential; however, itracks has agreed to license its patent to Artafact in exchange for monetary consideration. As a result, the pending case in the District of Massachusetts will be dismissed.

■ **The Federal Trade Commission** (FTC), Washington, D.C., assessed an $800,000 penalty against **Spokeo**, a Pasadena, Calif., data collector that the FTC said violated federal law by compiling and selling people's personal information for use by potential employers in screening job applicants, according to a June 13 article in *The New York Times*. The action is the FTC's first case addressing the sale of Internet and social media data for use in employment screening.

Spokeo agreed to settle the civil charges without admitting that they were true.

The FTC also charged that Spokeo created fake endorsements of its service and posted those comments on news and technology Web sites and blogs. The FTC said the comments were made up by Spokeo's own employees.

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■ Columbia, Md., research company **Arbitron Inc.** has filed a lawsuit in the New Jersey District Court Camden Office against media companies **McGavren Guild**, New York, and **Longport Media** for illegal use of Arbitron data.

Acquisitions/transactions

■ Newport Beach, Calif., online solutions comparison company **CatchFree** has acquired **KISSinsights**, an Ithaca, N.Y., analytics company.

■ Redwood Shores, Calif., software company **Oracle** has agreed to acquire **Collective Intellect**, a Boulder, Colo., text analytics company. Oracle and Collective Intellect will continue to operate independently.

■ Austin, Texas, research software company **Bazaarvoice** has agreed to acquire **PowerReviews**, a San Francisco social platform.

■ **JRA Research**, Nottingham, U.K., has acquired the panel of chefs and catering managers from **Premier Foods Foodservice**, Hertfordshire, U.K. Surrey, U.K., research company **EasyInsites** will continue to manage the panel.

■ London research company **BDRC Group** has acquired **ESA Market Research Ltd.**, Hertfordshire, U.K.

■ Los Angeles research firm **MarketCast** has been acquired by **Shamrock Capital Growth Fund III**, Los Angeles.

■ Encino, Calif., research company **Bovitz** has acquired **Resolve Market Research**, Los Angeles.

Along with the acquisition, Bovitz has rebranded with a new corporate logo and visual identity system.

Alliances/strategic partnerships

■ Portland, Ore., research company **Rentrak Corporation** and **MasterCard**, Purchase, N.Y., have partnered to combine Rentrak's TV viewing data with MasterCard's consumer trends and insights derived from payment transactions.

■ **Scarborough Research**, New York, and Washington, D.C., data solutions company **TargetSmart Communications** have partnered to combine TargetSmart's nationwide voter file with Scarborough's consumer data into a single dataset.

■ Research companies **TruSignal Partners**, San Francisco, and **eXelate**, New York, have partnered to make TruSignal's suite of TruAudience High Value Consumer segments publicly available to eXelate's 75+ integrated media platforms.

Association/organization news

■ The **Polish Association of Public Opinion and Marketing Research Firms**, the **Lithuanian Market and Social Research Association**, the **Association of Irish Market Research Organizations** and the **Bulgarian Association of Marketing and Opinion Researchers** have joined the **European Federation of Associations of Market Research Organizations**, Brussels, Belgium.

■ The **Market Research Society, London**, has partnered with London branding consultancy **Purpose** to rebrand, focusing on the word "Evidence."

■ The **Mobile Marketing Research Association**, Atlanta, has appointed **Siamack Salari** of Ethos and Everyday Lives as its first president.

Awards/rankings

■ Stamford, Conn., research company **InsightExpress** has received a 2012 Connecticut Quality Improvement Award for Innovation for the Ignite Network, the company's data analytics and research platform. The award recognizes Connecticut companies that excel in managing quality improvement for business success and growth.

■ **Robert Ramirez** of Ipsos Healthcare has received the President's Award from the **Pharmaceutical Business Intelligence and Research Group**, Morrisville, Pa., for his commitment to delivering and exceeding the market research needs of America's pharmaceutical companies.

■ The **Marketing Research and Intelligence Association**, Ontario, Canada, has announced the winners of the 2012 Excellence in Research Awards competition. **Sylvestre Marketing** and **PepsiCo Canada** received the Best in Class Award 2011 for the Pepsi Refresh program. **Kraft Foods**, **Fresh Squeezed Ideas**, **Ipsos and Nielsen** also received a Best in Class Award 2011 for the Big, Bold and Brewed to Perfection program. A full list of winners is online at www.mria-arim.ca/awards/excelawards05.asp.

■ Norwalk, Conn., technology community **Technology Marketing Corporation** has named Oslo, Norway, research software company **Confirmit** a recipient of a Customer Interaction Solutions 2012 CRM Excellence Award for its Confirmit Horizons platform.

New accounts/projects

■ **JTN Research**, Sofia, Bulgaria, has migrated its panel business to Oslo, Norway, research software company **Confirmit**'s Horizons platform.

■ **Samsung**, Seoul, South Korea, has adopted Mountain View, Calif., research company **Ace Metrix**'s Ace Metrix Live platform as its method for attaining real-time creative effectiveness measures.

■ **Best Buy Co. Inc.**, Richfield, Minn., has selected the consumer tracking service of Port Washington, N.Y., research company **The NPD Group** as its data of record for market sizing, share measurement and demographic assessment of the consumer electronics, information technology and mobile phone industries.

■ **Starcom MediaVest Group**, New York, has adopted USA TouchPoints from the **Media Behavior Institute**, New York, as its consumer insights and cross-platform media measurement tool.

■ **Visible Technologies**, a Bellevue, Wash., research company, has been selected by London communications group **WPP** as its preferred social listening and analytics platform for its operating companies in North and South America, Europe, Africa and the Middle East.

■ Los Angeles research company **MarketShare** has added New Brunswick, N.J., research company **Keller Fay**'s offline word-of-mouth (WOM) data streams into MarketShare's analytics engine.

Additionally, **GfK MRI**, a New York research company, has also added Keller Fay's WOM data streams to its TalkTrack/GfK MRI Data Fusion offering.

■ Portland, Ore., research company **Rentrak Corporation** has partnered with China research company **Sinomonitor** to launch Sinotrak in Beijing to measure all forms of video screens from digital devices in China.

■ San Mateo, Calif., research company **Epocrates Inc.** has joined **The Trust Alliance**, a London not-for-profit organization intended to advance health care data collection standards; develop and promote best practices; and foster trust in online physician research.

■ Vancouver, B.C., research company **Vision Critical** has named Mumbai, India, research company **Majestic MRSS** an official certified partner, giving Majestic access to Vision Critical's suite of tools.

■ **Opinions For Good Inc.**, a Portsmouth, N.H., research company, has adopted Westport, Conn., research company **Imperium**'s Verity and RelevantID digital fingerprinting technology for fraud prevention.

■ New York research company **UniversalSurvey** and its SurveyHealthCare and OpinionSite divisions have adopted Austin, Texas, research company **Kinesis Survey Technologies LLC**'s survey and panel management software platform.

■ **Time Warner Cable**, New York, has selected research companies **EasyInsites**, Surrey, U.K., and **DB5**, San Marino, Calif., to build its U.S. customer advisory panel of 10,000 panelists.

New companies/new divisions/relocations/expansions

■ U.K. research company **SPA Future Thinking** has entered into a joint venture with Paris research company **Groupe Acticall** to launch **Future Thinking France**. Stéphane Marder will lead the operation.

■ London research company **TNS** opened an office in Cambodia.

■ New York research company **Ipsos Interactive Services** has opened an office in Dubai, United Arab Emirates.

■ Rotterdam, Netherlands, research company **SKIM** has opened an office San Francisco.

■ Nuremberg, Germany, research company **The GfK Group** has integrated its global brand and consumer experience practice. Helen Zeitoun will lead the operation.

Research company earnings/financial news

■ **Focus Pointe Global**, Philadelphia, has received a capital infusion from **MVC Private Equity Fund L.P.** Terms of the financing were not disclosed.

CALENDAR OF EVENTS

••• can't-miss activities

Marcus Evans will hold a conference, themed "Canadian Consumer Insights and Trend Spotting," on August 14-15 in Toronto. For more information visit www.marcusevansch.com/CCI_QMR.

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

The RIVA Training Institute will hold its RIVA Revue training conference on September 6-7 at the Marriott Bethesda North Hotel and Conference Center in North Bethesda, Md. For more information visit www.RIVAinc.com.

The Merlien Institute will host a conference, themed "InsightsValley Europe Corporate Researchers Summit," on September 6-7 at the Dorint Hotel in Amsterdam, the Netherlands. For more information visit www.insightsvalley.com.

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

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

BNP Media will host its annual Packaging that Sells conference, themed "Make it Matter," on October 1-3 at the Embassy Suites Chicago in Chicago. For more information visit www.packagingthatsells.com.

The American Marketing Association will hold its annual marketing research conference on October 1-3 at the Bellagio Hotel and Casino in Las Vegas. For more information visit www.marketingpower.com.

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

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

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

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

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

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

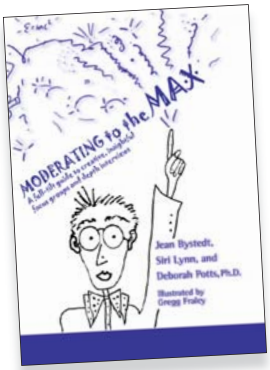
ESOMAR will hold its 3D digital dimensions conference, themed "(Online + Social Media + Mobile) Research," on November 4-6 in Amsterdam, the Netherlands. For more information visit www.esomar.org.

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

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

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

MARKETING RESEARCH



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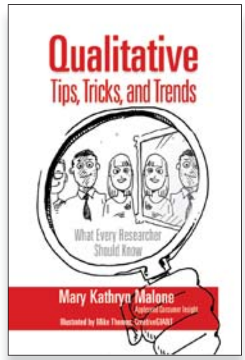

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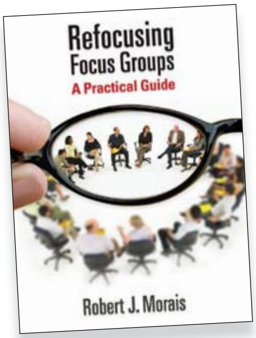

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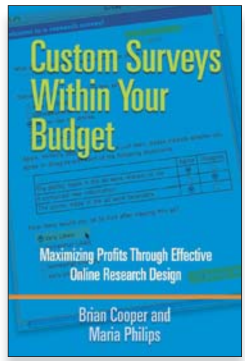

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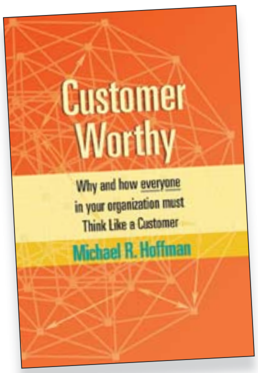

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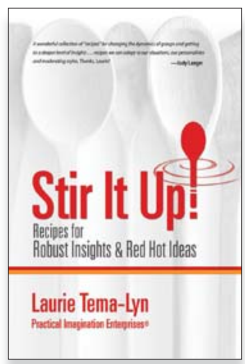

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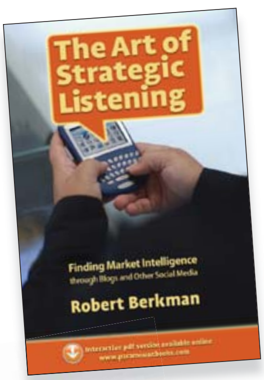

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BEFORE YOU GO

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Facts, figures and insights from this month's issue

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page **38** Who are these public complainers? Not surprisingly, the majority are under age 45..

page **53** Among U.S. consumers, "funny" is a personality trait most valued in a chocolate bar.se.

page **60** Great research companies get all the basics right and have inspirational leaders.

At Quirk's, September means SourceBook

We will once again suspend our regularly-scheduled editorial to deliver our annual Researcher SourceBook next month. The Researcher SourceBook is the most comprehensive directory of marketing research companies around the world, featuring over 7,000 listings – all searchable by name, geographic location, industry, specialty and more! In addition to the print version, the SourceBook is also available and searchable on Quirk's iPhone/iPad, Android and Kindle apps and online at quirks.com/directory. See you again in October!

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The Corporate Researchers Conference (CRC) is your conference – designed by corporate researchers for corporate researchers. If that isn't incentive enough to attend, we've sweetened the deal. Register by August 17 and you'll receive a free Samsung Galaxy Tab 2! All tablets will be distributed at the CRC on September 19-21 at the Fairmont Dallas. You can use your Samsung Galaxy Tab 2 at the conference and there will even be a conference-specific app!

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Congratulations to June's winner, Amber King of The Principal Financial Group, Des Moines, Iowa. June's prize was four free training sessions from Research Innovation and ROI Inc.