



Thinking Outside the Survey: New Options for Customer Insights

By [Nancy Pekala](#)

From idea management and prediction markets to instant polls and text analytics, it's time researchers expanded their toolkit beyond the tried and true survey and focus group. Researchers are working harder than ever before to justify their role in today's organizations. Embracing new and emerging methodologies will be critical to getting the job done.

Recently, [Marketing Researchers](#) spoke exclusively to Kathryn Korostoff, founder and president of [Research Rockstar](#), about the vast array of new methodologies available to today's researchers. In her new e-book, "[Thinking Outside the Survey: 14 Market Research Methods for Customer Insight](#)," Korostoff, who serves as the marketing research group ambassador in [AMACONnect](#), the AMA's online community, outlines some emerging methods that will help move market researchers beyond the traditional focus group and survey.

Marketing Researchers: *You've titled your new e-book, "Thinking Outside the Survey." Why is it important for today's market researchers to do just that?*

Kathryn Korostoff: There are two issues here. First, there is an issue of job protection. Unfortunately, not a lot of market researchers seem to be embracing the new methodologies as robustly or eagerly as they can be. Many non-survey based methodologies are gaining in popularity, but they aren't being used by traditional market researchers. In fact, some of the methodologies like prediction markets and idea management platforms are actually being used by functions outside of market research including product development teams, general marketing departments, PR and brand managers. We are losing control of some of the things being done here.



My concern is that all of these methods are being employed and adopted within organizations without the involvement of market researchers. We may become irrelevant if all the hot new stuff for gaining customer insights and understanding marketing trends is actually happening outside of the market research function.

MR: *You discuss a wide array of methodologies available to researchers today that go well beyond the focus group and survey. What is required for researchers to effectively add some of these methodologies to their research toolkit?*

Korostoff: A lot of patience, unfortunately. Nothing is going to come easy for us these days. The noise value is so high in terms of all of the things that are vying for attention in the world of marketing and market research. In my experience, what works best are demos, demos, demos.

We have to be relentless in demonstrating these methodologies to our colleagues, whether they be market research professionals on the agency or client side. We need to demonstrate it over and over again and not get discouraged. It takes multiple exposures to a new methodology for it really to be perceived as credible.

MR: *One of the methods you cite is social media research and the need to easily track what is being said about your brand or product across social media sites. Recently, a number of research-based associations have initiated efforts to establish a formal code of ethics for researchers to adopt regarding social media research. Is a formal code necessary?*

Korostoff: Unfortunately, I do think there needs to be some way of addressing [ethics in social media](#) research. Because this is such a hot topic right now, I do think there is good reason for us to emphasize the importance of having a good code of ethics for social media-based research by calling it out separately — at least temporarily.

I'm very concerned with the possibility of drastic regulation on how we use social media research. Governments in different countries are currently

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evaluating issues related to privacy in social media and on social networks, and it's in our best interest to be proactive and say, “Look, we are behaving ethically. You don't need to over-regulate us.” So, it's really a political move more than anything else. I do believe that over time, it will become redundant. Having a code of ethics for social media research will be redundant with having a code of ethics for regular, non-social media-based research, because all of these things are converging.

MR: *Another method available to researchers today is “idea management.” Can you explain what this method involves and how researchers can effectively use it to drive customer insights?*

Korostoff: Idea management platforms are one of my favorite methods these days, and I'm spending a lot of time experimenting with (them). For anyone yet who hasn't experimented with the idea of “idea management” platforms, there's a wonderful, publicly-accessible example you can see called MyStarbucksIdea. At MyStarbucksIdea (www.mystarbucksidea.force.com), anybody can register to become a member of the site and post ideas for Starbucks or vote on the ideas that are already posted. For many organizations, if you get the opportunity to bring a group of prospects or customers, or in some cases even employees, to a platform where they can submit and vote on ideas, it's a really exciting thing.

One of the types of projects we always do in market research is product concept testing. But maybe not all product concept projects need that type of methodology. Maybe they don't always have that type of budget or type of time frame. With idea management, you are basically open it up. Instead of asking people, “Hey, respond to these ideas; respond to these features and let us know what you think of them,” you're making it very easy for people to share with you proactively what they want to see. “Oh, we'd like to see this new product. We'd like to see this new feature. I think you should change the packaging on this.” And then you get the prioritization since people are voting on each other's ideas. It's very engaging. It really speaks to this method of co-creation that we have been talking about for some time now.

MR: *Social media channels and other technologies today are making it easy for researchers to quickly poll or survey target audiences. What role do you think methodologies such as Facebook polls or Twitter could or should play in market research?*

Korostoff: The great thing about simple polls like the ones on Facebook and Twitter is they allow researchers to do quick and dirty research. Now, of course you have to be rational about how you do it. Obviously, this type of research is not perfect. You have to understand the context. You have to understand whether or not the poll you're doing on Facebook is even closely related to your target market. You have to think logically about what you're getting. I've also seen some really cool Facebook polls done specifically on topics for Facebook fan pages. For example, I've seen brands do cool Facebook polls on just finding out what their Facebook fans want to see on Facebook. Something like that is totally appropriate.

MR: *Mobile research is also becoming important given consumers' increasing dependency on smartphones and mobile devices. What do researchers need to know about engaging consumers using mobile channels?*

Korostoff: Obviously, mobile is a very hot topic. The real bottom line on mobile research is it's a twist on panels. In recent years, a lot

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of survey-based research has been done using panels. Typically, these panels have been for online surveys: They recruit online; they send out survey invitations via email. Now, there are companies that are providing an integration of mobile platforms with an online panel where participants have received and accepted survey invitations on their mobile devices. So, it's just another kind of panel. Instead of getting a survey invitation on your desktop or laptop, you're getting it on your mobile device. There are some unique considerations to address in terms of length, types of questions and user interface. But again, to me, it's just an evolution.

MR: *There's been a lot of buzz lately about text analytics as a research method. What does text analytics involve and are there any specific scenarios where this method can be used effectively by researchers?*

Korostoff: Text analytics is a very interesting area. It's academically very interesting. There's a continuum here from very basic text analytics to very advanced text analytics. There are a lot of products and solutions all along that continuum. But text analytics, from a market researcher's point of view, is the issue of having all of this unstructured text and making sense of it.

For those of us who have been in market research for years, one of the things that have always been a challenge is that we want to include open-ended questions in our surveys. Not a lot of them because too many are onerous for the respondent, but enough so that we can get the "why" behind their answers. How do we analyze those responses? There have been tools available for years that kind of do it, but they take so much work to use, it's almost better to just do it by hand, in terms of coding and categorizing them.

Now, there have been a lot of advances in how text can be analyzed to better automate the process of saying, "These are the themes that this bucket of unstructured text is really talking about." For example, you can use text analytics to analyze text from an open-ended question in a survey, or from a discussion on a product review site or some other social networking site. A basic level of text analytics would be used, for example, to identify the most commonly used

terms and phrases and counting them. At the higher end, text analytics can help you extract meaning and sentiment to understand whether or not something that's being said is positive or negative. It's a very complex area and there are a lot of very strong opinions, both for and against, regarding the validity of text analytics.

MR: *Clearly, researchers now have a toolbox filled with a variety of methodologies from which to choose. What role will the effective use of these alternative methodologies have on moving the needle when it comes establishing market research as a viable, valuable function that drives business success?*

Korostoff: If we can do a good job of promoting some of these alternative methodologies; and if we can get people to start thinking about market research as more than surveys and focus groups, it will help us deal with a very bad PR problem the market research industry has. Too many people associate market research with surveys. They're skeptical about the value of surveys thanks to a lot of popular books that talked about things like behavioral economics, which really point out how there are issues with how accurately people self-report things like emotions, attitudes and behavior. Researchers have been aware of these limitations for a long time and have ways of mitigating these risks. We're careful of how we report research results so we're not overstating what we conclude. Still, there are a lot of other methods now that address the shortcomings of traditional research. If we want to stay relevant as the overall industry evolves, we have to show that we are innovative and we are more than just surveys and focus groups.

[Nancy Pekala](#) is the AMA's Senior Director of Online Content. Continue the conversation about new research methodologies in the **Marketing Research Group** of [AMACONNECT](#), the AMA's online community for marketers. Connect with us on Twitter [@twitter.com/marketing_power](#).