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Why I love moderating

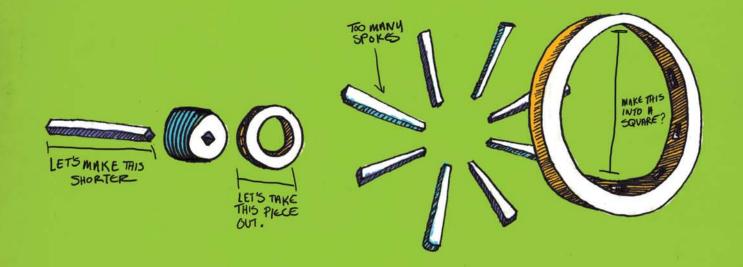
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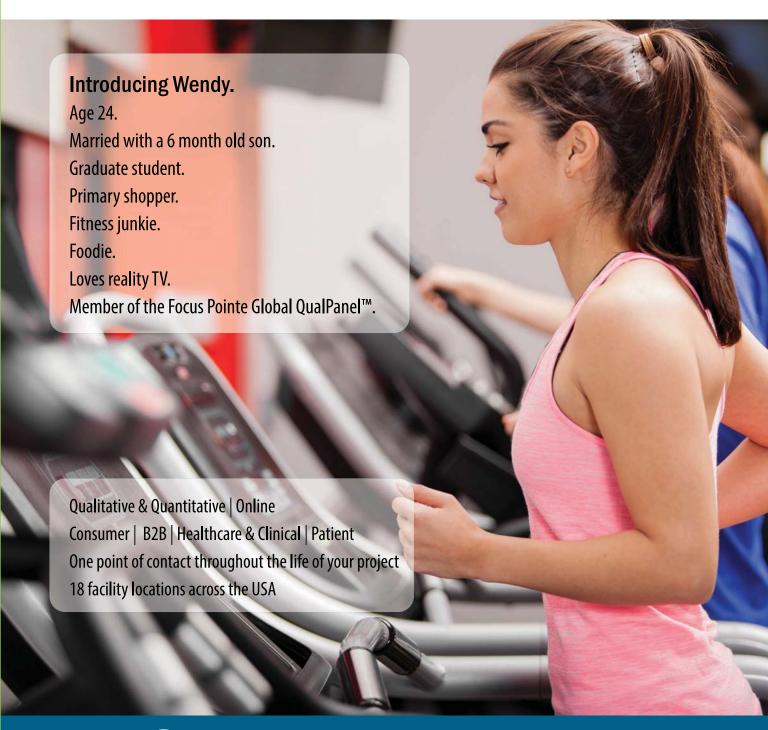


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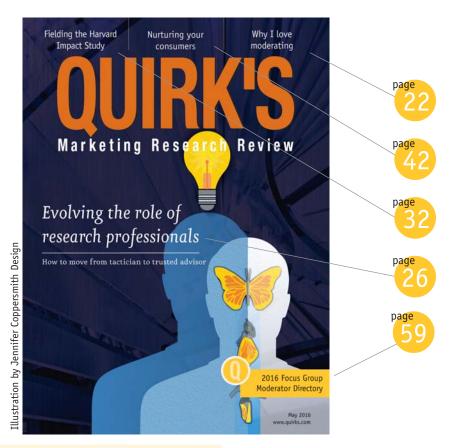


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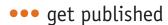
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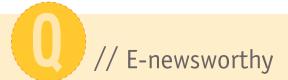
• • events

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Tou've probably checked out the Calendar of Events (p. 58) found in each issue \mathbf{Y} of Quirk's that lists all the marketing research-related happenings in the next few months but did you know we also have an online event database? It includes:

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- event hashtags;
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DIY digital ethnography: Part 2: Tips to success

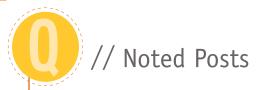
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••• advertising research

Study links ad interactivity to brand connection

 \mathbf{I} n Los Angeles, audience technology company YuMe Inc. and researcher Ipsos have released a new study showing

that interactive ad features significantly increase attention, recall and message breakthrough. The study was predicated in part on the concept of implicit reaction time, which measures how quickly and closely a respondent's brain connects networks of associations that are the foundations for images, feelings and intentions. A faster user response indicates a stronger and more emphatic connection with a brand or product and, therefore,

a higher conviction to purchase it. Interactive ads, according to this theory, succeed in these case studies because they increase certainty, illustrated by a shorter reaction time, and thus facilitate higher conviction and less inhibition. The study presented people with 11 different ad formats, representing five brands, on PCs, mobile phones and connected TV sets, finding positive impact of interactivity on ad engagement. The findings show that a positive media experience increases the chances for higher ad transference, resulting in stronger brand impact. The more



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interactive the ad units, the greater the impact on conviction across all brand associations. As a result, the level of interaction can potentially create stronger brand associations and connections.



••• shopper insights Millennials can't wait to spend gift cards

survey by the International ACouncil of Shopping Centers, New York, shows that of all age groups who received gift cards during the last holiday season, Millennials, at 31 percent, were the quickest to redeem them, doing so by January 2016, compared to only 23 percent of Baby Boomers. Millennials are also the most likely to purchase additional items when redeeming gift cards (64 percent). This includes spending on additional items in the same store where they redeem their gift card or picking up an online purchase in store and even making purchases at stores for which they did not have gift cards to redeem. Two-thirds (66 percent) of all American adults received gift cards during the holiday season. The most popular gift cards were for full-service restaurants (29 percent), followed by discount stores (26 percent), general Visa/MasterCard/American Express (21 percent), coffee/fast-food (19 percent), online-only (18 percent), traditional department stores (14 percent) and electronics (10 percent).



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Vendor-speakers, please resist the urge to sell

We've all been there. You settle into your chair at a research-industry conference session, excited to hear a researcher from a well-known CPG firm detail an interesting case study. They speak for a few moments and then turn things over to their vendor partner, who promptly steers the presentation away from the case study and toward a sales pitch, subtle or otherwise, for the firm's "suite of solutions." If you're lucky, the client researcher gets to come in for a few minutes at the end to wrap things up.

As conference organizers, we worry about this kind of Trojan Horse situation. For prospective presenters at The Quirk's Event, we stress repeatedly that they have to adhere to our Q-Mandments, one of which states: "During no part of your presentation should you ever sell your company, services or products." Most speakers play by the rules. But some folks just can't help themselves. Given the floor and a captive audience of potential customers, the urge to sell takes over and objectivity goes out the window.

You'd think that simple self-preservation would kick in and prevent the speaker from delivering a sell job to



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an audience that is expecting just the opposite. After all, who wants to be the one responsible for turning a bunch of nice people into an angry mob?

Thankfully, in looking over the data from our post-event surveys from this year's Quirk's Event in February, I didn't find many complaints about overly promotional sessions. But there were some.

Vendors, if you won't listen to me on this, maybe you'll listen to some of your potential clients, as taken from our post-survey comments:

"Some of the sessions were too promotional. Once or twice I felt like I was at a timeshare presentation. That was the exception, since most sessions were extremely useful."

"I went to a session or two in which the speakers really spent more time describing their product than the practice I could use in my own work. Please don't let sessions be sales pitches. If I can't transfer the practice without buying their product, the session is worthless to me."

"I felt some presenters provided too much information about their company in the beginning (wasted time) versus presenting their content."

"No quality control over some of the presentations — the research companies very often felt compelled to 'get their money's worth,' in the process delivering overt and ham-fisted sales pitches that turned me off and wasted my time. [Redacted company name] was awful



Joe Rydholm can be reached at joe@quirks.com

this way, spending 17 minutes of a 30-minute session talking about what they do instead of presenting research that sells what they do."

In other words, resist the urge to sell. Just don't do it.

Want more advice? Stick to the stated focus of your talk. Know that in most cases, the audience is there to hear from your client. If you have to share the podium, make it at least an even split. If the client can't go into great detail on the case study, make that clear at the outset (or consider finding a different client to co-present with!) and do your best to replace the missing content with related and complementary examples that give the attendees some useful takeaways.

If you must mention the proprietary tools or methods that were used during the project in question, make it brief. Invite interested audience members to seek you out after the talk if they want more detail.

Remember, a successful case study in which a respected consumer-facing firm used your company's tools and expertise to address a critical business need is the best kind of sales pitch: one that doesn't feel like a sales pitch at all. 0



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// Survey Monitor



••• real estate research

Prospective home-buyers leaning toward the suburbs

A shortage of single-family homes?

Over three-quarters of surveyed households would purchase a single-family home if they were to buy in the next six months and 79 percent of renters would choose to buy outside of an urban area, according to the second installment of the National Association of Realtors (NAR) quarterly consumer survey. The survey also found that confidence about now being a good time to buy is waning amongst renters, particularly in the West, where prices



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have solidly risen.

In NAR's first-quarter Housing
Opportunities and Market Experience
(HOME) survey, respondents were
asked about their confidence in the
U.S. economy and various questions
about their housing expectations and
preferences, including a question on if
they were to purchase a house in the
next six months, what type of home and
in what area would they choose to buy.

The survey data reveals an overwhelming consumer preference for single-family homes in suburban areas. Most current homeowners (85 percent) and 75 percent of renters said they would purchase a single-family home, while only 15 percent of homeowners

and 21 percent of renters said that would buy in an urban area.

"The American Dream for most consumers is not a cramped, 500-square-foot condo in the middle of the city but instead a larger home within close proximity to the jobs and entertainment an urban area provides," says Lawrence Yun, NAR chief economist. "While this is not a new discovery, supply and demand imbalances and unhealthy levels of price growth in several metro areas have made buying an affordable home an onerous task for far too many first-time buyers and middle-class families."

According to Yun, it's time for homebuilders to double their focus on constructing single-family homes. With Millennials increasingly buying in the suburbs – as NAR previously reported – tight inventory and affordability concerns will likely worsen without significant headways made in housing starts in relation to job creation.

Heading into the spring buying season, NAR's survey found that compared to the December 2015 survey the same share of homeowners (82 percent) but fewer renters (62 percent versus 68 percent last quarter) believe that now is a good time to buy.

"A high number of homeowners are expressing that it's a good time to buy and this sentiment is no doubt being fueled by the \$4.4 trillion in housing equity accumulation in the past three years," says Yun. "On the other hand, accelerating home prices and the perceived difficulty in obtaining a mortgage appears to be tugging at the confidence of renters."

Overall, respondents over the age of 65, those living in the Midwest and those with incomes over \$100,000 were the most optimistic about buying now.

Among current homeowners, fewer (56 percent) believe it is a good time to

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sell compared to the fourth quarter of 2015 (61 percent). Amidst steep price increases and tight supply, respondents in the West were the most likely to think now is a good time to sell, while also being the least likely to think now is a good time to buy.

Among all households in the survey, less than half believe the economy is improving (48 percent), down from 50 percent in last quarter's survey. Renters, those living in urban areas and respondents with lower incomes were the most optimistic.

The HOME survey's monthly Personal Financial Outlook Index of all households has slightly dipped (to 58.1) since December (59.6), but is mostly unchanged from March 2015 – reflecting stable confidence that respondents' financial situation will be better in six months. Currently, renters, younger and lower income households and those living in urban areas are more optimistic about their future financial situation.

(The Index ranges between o and 100: o = all respondents believe their personal financial situation will be worse in six months; 50 = all respondents believe their personal financial situation will be about the same in six months; 100 = all respondents believe their personal situation will be better in six months.)

Across all age groups, when asked about their future buying preferences, survey responses were closely tied to each generation's typical lifestyle, with younger buyers being more likely to consider buying a single-family home. Not surprisingly, renters and younger buyers would for the most part purchase larger homes, whereas older buyers would purchase similar or smaller sized homes.

Highlighting the apparent appetite for some older households to downsize and live in the city, respondents over the age of 65 were the most likely to consider a condo and nearly as likely as respondents under the age of 35 to consider purchasing in an urban area.

Most respondents indicated their preference to stay in a similar area to their current living situation if they were to buy in the next six months. Over two-thirds of those living in rural areas and 75 percent of those living in suburban areas would buy in a similar area. Only those living in an urban area would be more likely to move elsewhere, with a suburban area within 20 miles of the city being the most frequent choice of urban buyers moving to another type of area.

In January through early March 2016, a sample of U.S. households was surveyed via random-digit dial, including half via cell phones and the other half via land lines. The survey was conducted by TechnoMetrica Market Intelligence. Each month approximately 900 qualified households responded to the survey. The data was compiled for this report and a total of 2,781 household responses are represented.



shopper insightsMillennial use of printed couponson the rise

Affluents coupon too

As digital media and mobile use increase – particularly among Millennials – it is not at the expense of traditional media, namely print, according to the 2K16 Coupon Intelligence Report from Livonia, Mich., marketing firm Valassis. "Ninety percent of all consumers

across a variety of demographics use print and digital coupons," says Curtis Tingle, Valassis chief marketing officer. "What may be a surprise is that 83 percent of the influential Millennial generation used the same or more print coupons last year in addition to their increased digital coupon use. The key for astute marketers is to develop integrated print and digital coupon strategies to optimize consumer activation."

The report's findings include:

Print coupons are essential: 87 percent of all consumers use print coupons they receive in the mail; 82 percent of all consumers use coupons delivered via the newspaper coupon book; and Millennial use of mail and newspaper coupons increased more than other generations in the last year.

Affluent shoppers use coupons: Coupon use is not limited by income level, as even affluent shoppers (\$100K+ household income) seek value when making purchases. The report found that 90 percent of affluent shoppers use coupons; and 76 percent of affluent shoppers only buy a product if they have a coupon, compared to 72 percent of all consumers.

Smart, brand-loyal shoppers use coupons: Coupons are a significant influence on brand loyal shoppers' purchase decisions, impacting how they plan, where they shop and which brands they buy: 91 percent of brand loyal shoppers use coupons; and 78 percent are influenced to buy a brand they wouldn't typically buy due to a coupon.

Coupons offer more than just a discount: Coupons impact the consumer's entire buying decision process: 86 percent of all consumers use coupons to plan their shopping lists; and 77 percent of all consumers select their stores based on where they can use paper coupons.

A full copy of the report can be found at http://bit.ly/IMEP2eK.



••• food research

Consumers flummoxed by trans fats

What's healthy and what's not?

Nearly a year after the FDA mandated the removal of artificial trans fats from processed foods by 2018, a new consumer survey from Coast Packing Company, a Vernon, Calif., maker of animal fat shortenings, and Ipsos Research indicates many consumers remain confused about the entire subject of trans fats in the American diet.

The results confirm that there is a lack of understanding about trans fats among almost two-thirds of American adults: 64 percent either think that all trans fats are unhealthy (36 percent) or don't know about the health aspects of trans fats in foods at all (28 percent).

While almost five times as many respondents know that artificial trans fats in foods are unhealthy while natural trans fats are neutral to healthy (24 percent) – compared to 5 percent who incorrectly think that natural trans fats are unhealthy and artificial trans fats are neutral to healthy – the vast majority simply aren't aware that there are different

kinds of trans fats and that not all trans fats are toxic.

The survey of 1,000 adults, conducted in late February, examined awareness of trans fats in the American diet, specifically the differences between artificial trans fats – which are manufactured and added to food during processing – and those trans fats that occur naturally in foods derived from animals.

Because artificial trans fats have been linked to an increased risk of heart disease, the Institute of Medicine, a division of the National Academies of Sciences, Engineering and Medicine, recommends a trans fat intake as low as possible. In June 2015, the FDA made it official, determining that trans fats in processed foods are no longer Generally Recognized as Safe and ordering their phase-out within three years.

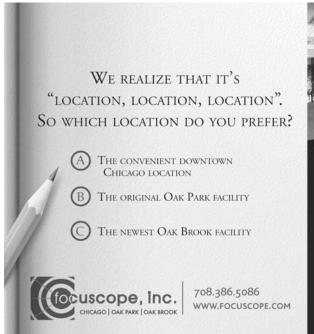
The FDA's order does not extend to naturally-occurring trans fats — that is, fats found in foods derived from animals (eggs, dairy, beef, etc.) — which are considered safe. As the survey indicates, these natural trans fats are frequently confused with manufactured trans fats that are created by adding hydrogen to liquid

vegetable oils to make them solid, often dubbed "artificial trans fats."

"A great many consumers don't understand the difference between artificial and natural trans fats because they simply haven't been told," says Eric R. Gustafson, CEO, Coast Packing Company. "Trans fats in processed foods have long been regarded, correctly, as a public health problem, but the discussion has rarely called out the distinction between toxic artificial trans fats and potentially healthful natural trans fats. Today, nutrition labels don't make it clear, so it's not surprising that confusion prevails in the marketplace."

While 24 percent of the sample overall recognized the distinction between artificial and natural trans fats, for Millennials that figure rose to 37 percent – and just 19 percent of that group said they were unaware of the health aspects of trans fats. At the other end of the age spectrum, just 16 percent of those 55+ indicated they were aware of the difference between artificial and natural trans fats.

The Coast/Ipsos survey revealed a gap in awareness based on income: 40 percent of those with annual incomes above \$50,000 regarded all trans fats





as off limits, while just 30 percent of those with incomes of less than \$50,000 did – a population that may well include Millennials. On a regional basis, 41 percent of those in the Northeast placed all trans fats on the do-not-consume list, versus 33 percent of those in the South. By gender, 10 percent of men overall saw no health issue with trans fats of any kind, compared to just 4 percent of women.

Families with children were marginally less likely to believe all trans fats are unhealthy and were more likely to know about the health aspects of trans fats in food. Education proved to be a differentiator as well, but perhaps not as anticipated: 43 percent of those with a college degree said that all trans fats are unhealthy, while only 30 percent of those without a degree held to that view – a disparity that nearly mirrored the results for those who are married (40 percent) vs. those who aren't (31 percent).

In late 2015, a Coast/Ipsos consumer survey found that that younger Americans are more receptive to animal fats in their diet than their elders – and are eating accordingly.

The survey of 1,000 adults examined how attitudes about animal fats in the American diet have changed in recent years and how consumption patterns may be changing as well. Respondents were asked whether they were more or less open to animal fats and whether those views extended to actual behavior.

The Coast Packing/Ipsos study was fielded from February 25-28. Ipsos eNation surveys consist of a minimum of 1,000 completes with adults 18 years of age or older in the contiguous United States. The sample includes individuals selected from the online segment of Ipsos' iSay/Ampario Panel and is balanced to be representative of the general population based upon region, gender, age and household income data from the U.S. Census Bureau. Results have a margin of error of +/- 3 percentage points.



••• shopper insights General Mills team outlines c-store snacking trends

The meal-time blur

From natural to made-to-order,
General Mills has pinpointed the
hot snacking trends c-store retailers
should be watching in 2016 in order to
meet customer demand, as reported by
Convenience Store Decisions.

The Consumer Insights team from General Mills Convenience & Foodservice analyzed the latest snacking data and convenience consumer behavior to uncover the top seven trends and opportunities for convenience stores in 2016 and beyond.

"This is such a dynamic time in c-stores right now as snacking and all-day eating become more prevalent and consumers seek out more from their snacks – from unique and unexpected flavors to customization to healthful benefits," says Kelly Kees, consumer insights researcher at General Mills Convenience and Foodservice. "This new era of snacking presents a major growth opportunity for c-store retailers that offer the right snack options to meet the changing needs of today's consumers."

Following is a checklist of seven steps to help retailers leverage the new era of snacking.

Modern mash-ups: Snack foods and flavor profiles are mashing together. C-store shoppers, especially Millennials, are open to multicultural influence and are looking to mix and match flavors and cuisines, while still being grounded in familiar favorites. Some brands are venturing into different nuances of flavor, like smokiness and tanginess. Expand food-service with multicultural offerings, like samosas, egg rolls and quesadillas, or take a twist on current food-service items by adding exciting flavors such as wasabi or Sriracha.

Back-to-basics: Health-conscious shoppers are turning to healthier foods, many of which are high in naturally occurring fats, e.g., nuts, avocados and coconuts. High natural fat and protein are linked with satiety. Ensure store assortments include products with inherent protein that are high in natural fats, like nuts, seeds and jerky.

Make it mine: Customizable specialty beverages and made-to-order food-service allow shoppers to add their personal touch to food. Millennials especially like to put their stamp on their own creation, which they are willing to pay for. Give shoppers room to make their own food creations, for example, condiment or topping bars in food-service areas like roller grills and specialty hot beverages. Customization cues freshness because food and drinks are made real-time and "just for me."

Fresh = real food: Temperature-controlled food, shorter date codes and words like "raw" and "simple" help cue freshness to shoppers, which appeals to consumers looking for less processed food. Expand refrigerated/fresh options and locate them near store entrances to alert shoppers to freshness. Offer more grab-andgo snack options, like cheese, eggs and fruit.

Transparency: Shoppers today are more concerned about what is in the food they eat. See-through packaging and clear ingredient decks with words they can pronounce give shoppers the label transparency they are looking for. Brands like Larabar feature simple ingredients that shoppers can understand while products like the Food Should Taste Good Real Good Bar have clear packaging to showcase the product's wholesome ingredients. Offer a variety of products that include simple

ingredients as well as clear packaging, which lowers risk for shoppers.

Shrinkage: Small, portion-controlled snacks allow shoppers to indulge guilt-free. Mini treats satisfy cravings, are portable, snackable and do not bust health goals, e.g., Pillsbury Mini bakery items. Tasty treats are not going away, so offer smaller portions or resealable packaging, which can encourage even the most health-conscious shoppers to indulge. Smaller treats also allow for easier sharing and snacking on the go.

Meal-time blur: Specific meal times are a thing of the past. Snacks can be meals and meals can be snacks. Hectic, on-the-go lifestyles result in more freedom when it comes to what and when we eat. Shoppers are more accepting of smaller, more casual meals, with half of adults replacing meals with snack foods three to four times a week. Be mindful of shoppers who may eat cereal at supper or hot dogs as a snack. Offer products or solutions that are flexible as a meal or snack option, hummus paired with pretzels and yogurt parfaits, for example. Merchandise similar snacks together to encourage bundling snacks to make a meal solution.

••• social research

Low-income households miss out on bulk savings

'Poverty penalty'

Turns out you have to make good money to save money. That's according to new research by Michigan

Ross Professor Yesim Orhun, who found that people with low incomes are less able to buy in bulk and move purchases forward to take advantage of sales.

Using Nielsen data on toilet paper purchases, her study with Ross Ph.D. student Mike Palazzolo showed that while low-income households tend to buy cheaper brands to save money, a large proportion of that savings is lost because these households buy smaller package sizes (at a higher unit price) and don't utilize sales as often.

Worse, the relative inability to buy in bulk and on sale has a compounding effect, exacerbating the "poverty penalty."

"Because they have to buy small quantities, they have little inventory at home and can't wait until a sale presents itself to purchase again, making it even harder to take advantage of sales," says Orhun, professor for marketing. "It's a double whammy."

The researchers' data shows that low-income households pay 5.5 percent more per roll of toilet paper than they would if they purchased more like high-income households – that is, if they bought in bulk and on sale more often. By contrast, low-income households save II percent on their toilet paper purchases by purchasing "cheap" brands.

Consequently, roughly half the savings low-income households reap by purchasing lower-tier brands is sacrificed because they struggle to buy in bulk and on sale.

The analysis also shows that it's not simply a lack of knowledge or awareness of sales and bulk discounts that drives the problem. There is also a cash flow issue. When low-income consumers have more liquidity – after getting their paychecks, for example – they do take advantage of bulk discounts and sales.

"It's not about poor people making poor decisions; it's about them facing liquidity constraints," Orhun says. "And it matters even for what we'd consider small purchases. Clearly, the government can play a role in easing liquidity constraint by making credit more accessible. However, government action isn't the sole potential source of liquidity relief."

Can retailers or manufacturers do anything about it? Possibly. Retailers could extend low-interest lines of credit to consumers for everyday items (like toilet paper). Manufacturers could offer promotions to encourage people to buy larger packages. This could also help lock in customers and help manufacturers avoid losing sales to brand-switching.





Product and Service Update

shopper insightsAlter Agents toolexamines groceryshopper triggers

Seeking those who are 'up for grabs'

os Angeles research firm Alter Agents Lhas launched its new proprietary syndicated tool, Shopper STAT (Spend, Triggers, Attitudes, Trends). The insight tool is based on continuous sampling of shoppers who bought groceries in the last 24 hours. It was designed to uncover the triggers that drive purchase decisions while comparing satisfaction and brand loyalty among brands. The research gives retailers shopper insights in the grocery consumer-packaged goods space that represent a shopper's experience, from digital reviews to purchasing. The tool is comprised of data from interviews of 1,000 shoppers per week. The survey, conducted within 24 hours of purchase, deconstructs what they intended to purchase, what they actually purchased and what happened in between. Clients using the tool can determine how many of their category shoppers are "up for grabs" at the shelf, what triggers can move more people to their brand (as well as what triggers are moving them away) and trends of shopper data over



quirks.com/articles/2016/20160504.aspx

time. Clients access data through an online dashboard that allows for multiple data cuts. The sample size allows for drill-downs to store type (grocery, mass, club, etc.). Demographics and shoppergraphics are also collected to help insights managers parse data into action.

www.alteragents.com

••• data analytics Google intros suite of marketing analytics products

Aimed at enterprise-class marketers

oogle, Mountain View, Calif., has Gintroduced the Google Analytics 360 Suite, a set of integrated data and marketing analytics products designed specifically for the needs of enterpriseclass marketers. The suite has six products, four of which are brand new, and two rebranded tools. The new products currently available in limited beta include Google Audience Center 360, a data management platform; Google Optimize 360, a Web site testing and personalization product; Google Data Studio 360, a data analysis and visualization product and Google Tag Manager 360, built from the company's tag management product. The rebranded tools include Google Analytics 360 (formerly known as GA Premium), which analyzes customer data from all touchpoints and integrates with Google's ad products to drive marketing effectiveness. It will roll out new capabilities throughout the next couple of months as investments continue to grow. Google Attribution 360 (formerly known as Adometry) was rebuilt to help advertisers value marketing investments and allocate budgets. The suite offers integrations with many third-party data providers and platforms. It also plugs into Google AdWords and DoubleClick Digital Marketing, Google's core ad technology,

allowing marketers to combine their own data from multiple sources – Web site data, audience data, customer data and more – and use it to make ads more relevant. Google Analytics Premium and Adometry customers will see the products renamed in the coming months, with Google updating them when they're eligible to join the new betas.

•• brand researchAdded Value,ZappiStore launchbrand insightsolution

What's your brand's character?

In Los Angeles, marketing consultancy Added Value and research technology firm ZappiStore have launched SNAPSHOT, a solution designed to provide inspiration and answers to big brand questions for marketers and their agencies. The solution includes three core Added Value insight tools: Cultural Traction, which explores how well a brand is leveraging culture by measuring its VIBE (a quantitative composite metric that shows how visionary, inspiring, bold and exciting a brand is perceived); Brand Equity, which uncovers the presence of a brand in the marketplace and the strength of the emotional connection people have with it; and CharacterLab, which enables marketers to test the strength and nature of their brand's character and guide its development. Snapshot is available on the ZappiStore platform. Sample is provided by Warren, N.J., data collection firm Lightspeed GMI. zappistore.com

political researchNielsen launchesElection CentralWeb site

Tracks earned media, digital audience reach

 ${f N}$ ielsen, New York, has launched its first Election Central Web site for media and political influencers. The space on Nielsen.com will be a repository of Nielsen's political media data, providing the industry with information on things like individual candidates' earned media reach, digital audience reach and voter segments from markets within key battleground states. Election Central uses data points from Nielsen Political Solutions, a variety of syndicated and custom products that deliver data across multiple platforms, including television, digital, radio and social media. The site will be routinely updated with new and fresh data sets as the 2016 political races progress.

www.nielsen.com

••• automotive research

Searchable auto safety application from J.D. Power

Spot trends, develop benchmarks

Westlake Village, Calif., researcher J.D. Power has launched SafetyIQ, a new application to help auto industry professionals analyze vehicle safety data more efficiently. The online application integrates National Highway Traffic Safety Administration data with J.D. Power automotive data, all searchable by vehicle make, model, year, age and component. SafetyIQ is updated daily with the latest data on recalls, technical service bulletins, customer complaints and investigations. All data is standardized through an interface, allowing auto industry professionals to spot trends, develop benchmarks vs. competitors and

prioritize areas of focus. The application also tracks completion and overall recall rates to provide an industry-wide view of vehicle safety-related data.

www.jdpower.com

video researchMicrosoft debutsvideo feedbackservice

Second-by-second responses

Microsoft, Redmond, Wash.,
has launched Video Pulse, an addition to the Pulse service that allows researchers, broadcasters and professionals to collect feedback on recorded video on any digital property. The service ties audience reactions to a video timecode, enabling users to rate and provide feedback on video second by second, as well as to playback their and other respondents' feedback on demand. Some applications of Video Pulse include Ad Testing, which enables market researchers, political campaigns, brands and more to test how potential customers respond to an upcoming ad campaign or other digital content; and Broadcasters, allowing content producers to continuously gauge reaction of their audiences to content, no matter when the video is viewed. At press time, Video Pulse was slated to be generally available to users in April. Select customers will be invited to join the Video Pulse preview program or can express interest via e-mail.

www.microsoft.com

••• DIY research Toluna adds to QuickSurveys platform

Focuses on consumer attitudes

In Wilton, Conn., researcher Toluna has introduced PowerAttitudes, the latest addition to its QuickSurveys DIY survey platform. The cloud-based, automated

research tool enables marketers to generate insights into the consumer attitudes that drive usage and purchase behavior across brands, products and stores. Users enter their brand or product name, up to three competitors and product perceptions and 10 key attributes and usage statements. They then select the target who they want to interview and launch their project. Users can access insights such as shopping habits by buyer type, guidance on new product development opportunities, effectiveness of overall advertising strategy and more. This product release comes on the heels of an announcement that Toluna received a S10 million investment in the QuickSurveys platform.

www.toluna-group.com

••• Briefly

■ MSW•ARS Research, Lake Success, N.Y., has launched The Brand Strength Monitor, a system that provides access to an independently-validated measure of brand value. Through the system, brand and finance teams can view the current levels and trends for all relevant brands in a category. This data can be further cut by demographics to provide brand strength within population subgroups of interest. Data can be exported to a variety of spreadsheet, statistics and finance software for integration into existing corporate reporting systems. The 2016 rollout provides coverage for 37 countries, with additional countries becoming available starting in 2017.

www.mswresearch.com

■ The NPD Group, a Port Washington, N.Y., researcher, has introduced a premarket sales forecasting service. The service can be used to assess, diagnose and improve the sales potential of new and revamped products and services before they are launched. Jia Guo will lead the company's efforts. The firm will also offer a concept testing service to work hand-in-hand with the forecasting service. The overall approach will deliver a quantitative pre-market sales forecast, including simulation of multiple launch plans and a source of volume analysis to help marketers evaluate and maximize product potential and marketing ROI among the target population of interest or specific segments of that population. www.npd.com

■ Irvine, Calif., firm MFour Mobile Research has launched a public beta for MYResearch, a DIY mobile survey technology that allows researchers to program and field surveys to active consumers on the firm's mobile panel. It also allows users to design, program and launch their own surveys. Consumers are contacted in real-time by pushnotification, eliminating delay times and providing immediate feedback. Users can target demographics, set qualification questions and exact quotas to find hardto-reach groups, along with reaching consumers in-store as they're shopping using GPS technology.

mfour.com

www.cint.com

- Stockholm, Sweden, software provider Cint has launched OpinionAPP, a free native app for the panelists hosted on the firm's OpinionHUB platform. OpinionAPP offers a branded experience with survey opportunities so panelists can engage with the panels they are a part of. The goal is to offer a better user experience for panelists, with an overview of all of their survey panels from one access point, making access to surveys easier, more engaging and "PC-free." Additionally, they will be able to improve their profiling points, resulting in more and better-matched surveys. For Cint panel partners, the app will be available with no fees and no technical skills required for the implementation. During 2016, Cint plans to improve and expand the app to tie it into the upcoming Real Time Insights solution. OpinionApp is available on on iOS and Android.
- GutCheck, a Denver-based research solutions firm, and New York researcher Millward Brown have launched Pre-LinkNow, a new qualitative solution developed to optimize ad creative by helping marketers better understand ad performance. Pre-LinkNow pairs Millward Brown's Link copy testing solution framework with GutCheck's methodology, allowing clients to incorporate consumer feedback throughout the creative process. It also provides a common language and framework across both quantitative and qualitative research. Pre-LinkNow is currently available and over time will be available across 26 countries. www.gutcheckit.com

- The Dieringer Research Group Inc., a Milwaukee research agency, has released 6 Steps for Launching CX Insights, a 15-page e-book that can be downloaded for free from the firm's Web site. thedrg.com
- In New York, advisory services firm Insight Industry has launched its new Web site.

insightindustry.com

- Milwaukee research firm Market Probe has introduced a new customer experience management (CEM) framework to help businesses define customers' stages of product ownership or service relationship, with the goal of earning customers' advocacy and loyalty. Market Probe offers technologyenabled solutions to implement this new framework or migrate current CEM programs into it.
- www.marketprobe.com
- Research Now, Plano, Texas, has revealed new sourcing partners, enabling new panel capacity for 2016. The company signed 19 new "byinvitation-only" (e-Rewards) panel partners in recent months, increasing its new panelist enrollment capacity across North America, EMEA and APAC. In addition, the firm has launched a new panel management platform that has improved its ability to support and engage panel members. Although early in its deployment, the new platform has been used to launch panels in four new countries and delivers improved member engagement, audience reach and study feasibility. The new partners join the company's existing e-Rewards Partner base, for a total of more than 60 strategic panel partners sourcing panelists into Research Now's global panels. The industries represented by the new panel partners include automotive, casual dining, entertainment, retail and travel. www.researchnow.com
- Irvine, Calif., firm MFour Mobile Research has voter-matched its allmobile U.S. panel, which delivers political insights and information on the beliefs and attitudes that shape U.S. voter behavior. In addition to demographic points, the panel provides information on voter identification

number, registration status, party affiliation and more.

mfour.com

- GfK MRI, New York, has partnered with data management platforms (DMPs) to launch 23 online advertising targets that bring insights to political ad campaigns. The segments integrate voter registration records with data from GfK MRI's database on consumer attitudes and behaviors, derived from its Survey of the American Consumer. The targets include "super" voters (those most likely to vote), as well as those moderately and slightly likely to vote, based on their voting records. Other targets include registered voters, swing voters by party, as well as undecideds, voters by ideologies and engaged voters. Onboarded by Oracle's Datalogix, the targets can be accessed now via BlueKai, with other DMPs to be added in the near future. www.mri.gfk.com
- Plano, Texas, firm Research Now has launched a new in-app media measurement solution that enables brands to measure the performance of advertising campaigns across desktops, tablets and mobile devices, with the ability to connect to a single individual. The new in-app solution is the newest addition to the ADimension suite of products for ad and audience measurement offered by Research Now, allowing brands to gain access to exposure identification through device IDs and determine the effectiveness of a campaign's performance across multiple publishers and ad networks at scale. The full media measurement solution is available in the U.S. and U.K.

www.researchnow.com

unruly.co

■ U.K. video ad tech company Unruly has introduced Unruly Pulse, a new dashboard that uses consumer responses to show marketers which emotions drive engagement across different demos, events, territories and product verticals. Advertisers can also analyze individual ads and compare their overall performance in their sector. The dashboard is currently available in beta in Future Video Labs across the U.K., U.S., France, Germany, Nordics and Southeast Asia.

- Culver City, Calif., research solutions firm dataSpring has launched a new Web site. www.d8aspring.com
- San Diego software firm Salford Systems has released version 8 of its Salford Predictive Modeler program. Enhancements include faster processing, better use of RAM to run larger analytical problems, more exploratory data analysis tools and new loss functions for TreeNet Gradient Boosting to support more accurate models.

www.salford-systems.com

- Cincinnati ad targeting and measurement firm Nielsen Catalina Solutions and New York media company Time Inc. have developed a new method of cross-platform advertising measurement that measures the quantifiable in-store sales impact of campaigns across print, digital and TV. The methodology reconciles different medium-specific measurement models and the effect of a secondary (or pass-along) magazine audience to create a method for measuring cross-platform sales impact. www.ncsolutions.com
- Nielsen, New York, has launched Nielsen Digital Audio Ratings, a new solution to measure over-the-air radio listening across mobile apps and Web players, regardless of ad model and device - smartphones, tablets and computers. The service allows users to assess the value of digital inventory and clarify return on digital investments while aligning with established broadcast and digital currencies. Nielsen Digital Audio Ratings is a component of Nielsen's Total Audience, an initiative that provides metrics across all linear and digital platforms. The service, which is currently collecting data on more than 2,500 station streams across all 48 personal people meter (PPM) markets, measures the extension of broadcast radio to streaming environments. Initially, it will report the listening of digital streams of AM/FM radio stations and e-radio stations in the 48 PPM markets. Measurement for custom-curated and on-demand audio, including podcasts, is currently in development. www.nielsen.com

■ Pittsburgh-based data analysis software provider Rhiza has introduced Rhiza for Ad Sales, a programmatic sales acceleration solution for local television. The solution generates relevant target information and an optimized media recommendation using ratings data from Nielsen or comScore. Rhiza's data tools find an advertiser's best target customers and connect them with the ad inventory most likely to move them to purchase. Rhiza for Ad Sales is available now for the automotive and political advertising markets and will be available in the coming weeks for dining, consumer technology, retail, health care, local services, telecommunication,

rhiza.com

entertainment and more.

■ New York-based media investment firm GroupM has launched LIVE Panel, a new consumer and media insight solution allowing its agencies to more efficiently develop targeted media plans so advertisers can more effectively reach their audiences and measure outcomes. The new platform connects with multiple data sources across London-based researcher Kantar's data and research assets and integrates with the planning tools of GroupM's media agencies to accelerate the time from insight to planning to implementation. LIVE Panel is launching with a global hub survey generating media knowledge on 30 media and 40 touchpoints including consumers in Argentina, Australia, Brazil, Canada, France, Germany, Singapore, the United Kingdom and the United States. www.groupm.com

a new research service that can deliver 1,000 to 2,000 consumer responses in less than 24 hours in the U.K., U.S., France, Germany, Spain and Italy. The service allows users to ask up to 25 consumer questions via Harris' online research panels or their own e-mail sample and receive resulting data on the same day, with Harris providing a full insight analysis of the findings within two to three days. Users can target up to three broad demographics out of a total of 11 options through Harris panels. The types

of studies suited to a Harris 24 approach

include concept/communications testing, pricing and promotions testing, gaining

■ In London, research agency Harris

Interactive UK has launched Harris 24,

opinion on hot topics, PR-focused surveys, customer satisfaction and more. harris-interactive.co.uk

■ Nielsen, New York, has reported that it plans to expand its digital advertising measurement solution, Digital Ad Ratings. The firm says by the end of 2016, Digital Ad Ratings, including mobile measurement, will be available in 25 markets globally. Over the course of the year, the firm will launch Digital Ad Ratings measurement in eight new markets, including Poland, Turkey, Hong Kong, Taiwan, South Africa, Puerto Rico, Ireland and New Zealand. Digital Ad Ratings mobile campaign measurement recently launched in Thailand, Singapore, Indonesia, Malaysia, Philippines, India and Mexico and will become available in Japan within the coming week. The continued expansion also advances Nielsen's Total Audience initiative, providing total ad measurement through the integration of Digital Ad Ratings data and television ratings. A total audience view of advertising already exists in the U.S., U.K., Italy, France, the Philippines and Thailand and will be available in Indonesia and Malaysia within the next three months.

www.nielsen.com

Adobe, San Jose, Calif., has introduced the Adobe Marketing Cloud Device Co-op, a network that will enable brands to work together to better identify consumers across digital touchpoints while ensuring privacy and transparency. The Co-op will allow participating brands to recognize their consumers so they can deliver more personalized experiences across devices and apps at a large scale. It will also enable member brands to provide their consumers with a more consistent content experience as they migrate across devices by establishing links between a group of devices used by unknown consumers or households. With this capability, marketers will be able to better understand and respond to consumer behaviors across devices, leading to more accurate Web site engagement metrics, more personalized content and more targeted advertising experiences across search, display and social.

www.adobe.com





Why moderating is the best job in the world

| By Alice Morgan

snapshot

Alice Morgan charts the many reasons she loves to interview people for a living. y husband owns a barbecue restaurant. When people find this out, a spirited and lengthy discussion of barbecue ensues. What sauce? (He makes five – all from scratch.) Dry rub, or no? (Mostly dry, but we offer wet and dry ribs.) What wood is used on the smoker? (Hickory.) It goes on and on.

When people find out that I moderate focus groups, or (more simply put) interview people, they politely say "Oh, how interesting." An awkward silence ensues. And I understand why. "Interviewing" is an abstraction. It is hard for people to understand who I interview, why I interview, and in what context the interview occurs. So, in this article I would like to explain to you, humble reader, what we moderators do and what is so wonderful about it.

There but for the grace of God go I. We all live in a bubble, whether it be a city, a suburb or a rural community. In my case, I live in Ann Arbor, Mich., a Midwestern college town. It is a diverse, highly educated, happily sports-obsessed place. Moderating gets me out of my bubble, as I am constantly reminded that there's a whole world out there of people different than me and my townsfolk. Last year I worked on a project in which I interviewed convenience store employees. Most convenience store employees are not highly educated. Most are just getting by. But many of these clerks, with

high school educations at best, provided razor-sharp feedback. The takeaway was crystal clear: what separates people in my community from the convenience store workers I interviewed is opportunity.

We learn a little about a lot. Moderating is a job in which we work with many different kinds of clients. What we ask about – and learn about – runs the gamut. Bathtubs. Moisturizer. Lawn service. Grocery shopping. Personal investments. College. Diabetes. Employee training. You name it, we ask about it. Any time a company is trying to find out what their target customers think of a product or service they currently offer or plan to offer in the future, they bring us in. (Or at least they should!) This is a job for the intellectually curious.

Moderators just wanna have fun. Cyndi Lauper aside, moderating is fun. We get to use all sorts of cool, colorful office supplies. Stickers. Stickies. Sharpies. Paint chips. We ask people to engage in a wide variety of creative activities, including drawing cartoons, taking selfies, making collages, sorting cards and playing games. When people have fun, they relax. They let their guard down. They stop telling us what they think they should say and open up. For example, people will usually say that price is the most important criteria in purchasing most items. And I get that price matters. But it isn't everything, by any means. Projective exercises foster an environment in which people feel safe talking about more subtle, complex motivators, like how buying an



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item makes them feel strong or sexy. When people expose their inner truth, that's when the magic happens.

Never a dull moment. There is no one way to interview people. Lots of people are successful at it - introverts, extroverts, the whole shebang. What is needed is creativity and the ability to turn on a dime. We all get there differently. In several instances I have had people start crying as they recounted painful experiences (one was about a horrific experience with a doctor, one was about on-the-job stress). I needed to lighten the mood – fast. And I did. Moderating a group is like conducting. We bring out the taciturn and subdue the loquacious. It is challenging. No two groups are ever the same. This is a job that keeps you on your toes.

See how the sausage is made.

Moderators get to view the totality

of the new product development process. We help companies identify unmet needs, leading to the invention of products or services that are new and needed. We help companies test positioning statements, leading to successful new product launches. We help companies evaluate advertising, leading to engaging, eye-catching ads which possess "breakthrough."

All walks of life. There are many jobs in which people are exposed to a wide swath of society but often that exposure is fairly brief. Interviewing people is intense. Moderators get to know people on a profound, personal level. I have interviewed CEOs. I have interviewed plumbers. I have interviewed moms. During a recent project about car dealerships a participant and I were at a Jeep dealership for three-and-a-half hours (during which he actually bought a car). Not to sound too grandiose

about it but moderating is about the human condition.

No job is perfect. The problem with moderating is that moderators spend quite a lot of time, well, not moderating. There is the process of figuring out who to interview and how (aka study design). There is the process of determining what to ask (aka crafting the discussion guide). And there is the process of analyzing what people said and what it all means (aka writing the report). But the essence of moderating, interviewing people alone or in groups about topics of interest to my clients, is fantastic. And that is what keeps me - and my peers - still crazy about qualitative after all these years. 0

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snapshot

David Santee shows how researchers can use the concepts of logic, emotion and trust to boost their internal standing and raise the profile of the insights function.

••• the business of research

From tactician to trusted advisor

Evolving the role of research professionals

| By David Santee

Have you ever considered how much influence you have within your organization? As market researchers, we certainly want to think it's significant. After all, we have our fingers on the pulse of the market, rich data at our disposal and access to facts that can change the course of our organization. Ergo, of course we have influence.

Well, not so fast. As professional researchers, we are adept at gathering and mining invaluable data for our clients or organizations. But we often struggle with effectively communicating that data to senior leadership in a way that influences business decisions – acting as strategic partners, if you will. As a profession, we seem to have trouble with this role. For example, a study by the Corporate Executive Board revealed that while 65 percent of senior leaders want us to be strategic partners with them, only 25 percent view us that way.

I find that discouraging, yet there doesn't seem to be a lot of advice or meaningful discussion within our publications and conferences on how we close this gap. But we need to. Quite simply, becoming an influencer or trusted advisor is our most important job. Jim Figura, former VP consumer insights at Colgate-Palmolive, is on record as saying, "If they don't take your recommendation, it's your fault."

I like this sentiment. It puts the responsibility on us. Nothing will change unless we make it change. The good news is, we don't need permission from anyone. In fact, those senior leaders are waiting for us to step up. We just need to do it.

Stay within our comfort zone

So where do we begin? First, let's be clear: Good research and sound methodology are cost-of-entry in our profession. Often we fail as influencers because we stay within our comfort zone, relying on our methodologies and techniques. That's only half the job. To truly influence and have a positive impact on our organizations, we must not only deliver our information and opinions but ensure they're heard and understood by our clients or leaders.

Fortunately the pathway to influence is well-established. The things we must do to help our clients really "get it" have been researched and practiced for literally centuries. Aristotle laid out three elements of influence thousands of years ago that are still valid today: logos – the logical appeal; pathos – the power of an emotional appeal; and ethos – influence through credibility and character.

We just need to understand how they apply to us. Everything we will ever read on influence fits within this structure, so understanding these elements provides a framework for our efforts to influence.

Logos: the numbers, the facts

For us analytic types, logos – the logical appeal – is our strength. Logos is about the numbers, the facts and rational arguments. The stronger our numbers and logic, the stronger we can make our case.

That said, success doesn't come just from our data or our insights. Because it's not just about us!

Let me illustrate. Several years ago, I did some consulting with a large international firm in Mexico. The company's inhouse analysts were frustrated that their recommendations were not being accepted. The reason was, their internal clients relied on sales data rather than market research data. When the data sets conflicted, they always went with the sales data.

Who can argue with that? This story highlights the importance of being aware of other data within the organization. Granted, we're great at reporting data. But our data – valid as we think it is – lives in an ecosystem of data, not a vacuum. Another Corporate Executive Board study

found that, on average, senior executives use eight sources of information for most decisions. Facts are great but we're not the only ones with them. It's key to understand how our data fits with analytics, sales patterns, finance, etc., because not all these sources of data will align and tell the same story. Typically, the executive is left with sorting through conflicting data to reach a decision.

Let me relay an experience that demonstrates the peril of that approach. I was once in the boardroom with my CEO and the head of analytics. The CEO asked me what I thought about our pricing strategy. I gave a clear, definitive answer based on in-depth market research. He then turned to the head of analytics and asked her. She gave the exact opposite answer based on all of her modeling. Needless to say the CEO was frustrated. After all, we were the ones who were supposed to know the answer.

Bottom line: Both of our datasets were right yet neither of us truly understood how this data reconciled; neither of us understood the entire situation.

Essentially, we gave the CEO permission to ignore both of us. We missed a huge opportunity to influence the company's pricing strategy and our bottom line simply because neither of us had a full understanding of the entire picture.

Want to be a hero to the CEO? Reconcile all the conflicting data.

Three key things can help you gain an overall perspective, strengthen your position and more effectively influence outcomes:

Diligently gather other relevant data. Get on the distribution list for other data sources so that you can compare. Typically this is an easy thing to do and it does not take much time. Just a quick periodic scan will keep you abreast of key trends. If you are a research supplier, ask to see more than the studies you execute.

Present complementary and/or conflicting data. When pulling data together for anyone whose title begins with a C, search out relevant data from other sources as well as your own. Make sure your data and conclusions are consistent with this other data. If not, rethink your conclusion or have a good reason why your conclusion is right in spite of the conflicting data. If your data is consistent, bring the other data into your summary – it will strengthen your argument.

Assemble an impromptu team to review an issue. Pull together representatives from analytics, sales analysis, operations, finance and product management. Walk through the data on an issue and reconcile everyone's input. You will have a much better understanding of all the issues and your insights will be much more on-target. Also, all those on this team will be giving the same story up their chain of command. Finally, this helps you be seen as a leader.

Remember, most senior execs are looking for someone who understands their business – a trusted advisor. While technical skills are simply assumed, and can be easily replaced, a trusted advisor is priceless. This applies to the supplier side as well. Understanding other data sources will give us a much broader perspective of the company. This, in turn, will enable us to provide much more insightful analysis and recommendations.

Bottom line: Logic is a powerful



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Pathos: emotions can be powerful

Wouldn't it be great if the facts could simply speak for themselves? Why do we have to think about influence and, worse yet, emotions? When we start talking about "feelings," we analytical types start getting squeamish. Why can't we just give them the facts?

Well, the truth of the matter is, there is now significant research that proves we humans make decisions based on emotions and justify those decisions rationally. This theory has been around for many years. But now with advancements in brain science, it has been proven. In his book How Customers Think, Gerald Zaltman reports, "The conscious mind explains actions produced by unconscious processes."

Since we know this from a consumer behavior standpoint, it only makes sense that it applies within an organization. In fact, I was in my office one day recently talking about this with someone on our team. That's when it hit me: The CEO – he's a person too. For that matter, so are the CMO and all those on the operating committee who make the really big decisions. So, considering that decision-makers are people, their brains work just like the rest of ours – they decide based on emotion and justify rationally.

Do you doubt it? Have you ever heard the expression, "Nobody was ever fired for buying IBM"? This is clearly an emotional decision; one based not on capability but on staying safe in a job.

In his book The Fifth Discipline, Peter Senge identified several organizational learning disabilities. Among those is the "inability to escape existing mental models." That sentiment is echoed by John Maynard Keynes: "The difficulty lies, not in accepting new ideas, but in escaping from the old ones."

I have found that even when the data is clear, it is really hard to get someone to change course. Why? Because they may be invested in a course, regardless of whether it's the best one. And the longer a company has been on an existing course, the more difficult it is to effect change.

If we ignore the importance of

emotional decision-making, we will be relegated to being data-crunchers with no influence. So how can we tap into the art of influencing from an emotional perspective?

Over the years I've found two of the best tools are stories and metaphors. Simply reporting the numbers does not work. Capturing your audience from an emotional standpoint and beginning to sway decision-maker emotions in your direction can be accomplished through compelling presentations – telling the story in a way that generates interest and acceptance.

Storytelling has received a lot of attention lately – as it should. The term has has turned into a catchphrase that ranges from a real story to applying storytelling concepts. The entire concept is valid and important.

I was once with a CEO and his top officers. I shared all the customer satisfaction numbers and I showed how our satisfaction had not moved despite our best efforts. But there was little motivation to change until the CEO read a customer's letter. The letter told a story about the customer's journey and the frustration she encountered. That one story had much more impact than all my numbers. It added clarity and resonated with management in a way my numbers could not. As a result, significant efforts were put into place to enhance client satisfaction.

Metaphors are also wonderful at bringing in significant meaning and emotion with just a few words. I once compared one of my firm's products to milk at a supermarket. Why? Everyone has milk, it's pretty much the same from store to store, the cost is the same and everyone knows that everyone has it. Given all that, why would we spend millions in advertising telling people that we have a ubiquitous product? My recommendation was that we spend our communications dollars on building differentiation.

I had lunch with the CMO from that firm a few years later. I learned that in spite of the hundreds of studies I did for her and all the battles we went through together, it was the milk metaphor that she remembered the most. Not any statistics – the metaphor.

Other tools that can also be effective at helping you tell the story

include video clips, references from reputable secondary sources and even competitive statements. These can all help evoke the emotional side of decision-makers.

Ethos: influencing through credibility and character

Put in modern terms, ethos is about establishing trust. Of our three elements of influence – logic, emotions and trust – I believe this is the most important. It has to do with who we are – not our data, our knowledge or our good story-telling techniques.

Seth Godin has stated, "Earn trust, earn trust, earn trust. Then you can worry about the rest." Earning or gaining trust means more than just being dependable and delivering on time. Trust is an inherently emotional concept. When we have a new client, our first task should always be building trust. Although our tendency may be to wow them with our technical expertise and the plethora of knowledge at our fingertips, we need to refrain. Building trust is far more important than demonstrating our expertise. No matter

how much data we have, no matter how we spin the story, we will be completely ineffective if we are not trusted.

Consider this example: As a category manager working with the top salespeople in the company, I hired an analyst who had a fantastic background in sales. Unfortunately, he immediately launched into telling our sales team what they were doing wrong. He may have been right but he never established the trust that was needed. He became completely ineffective and we had to make a change.

Trust is so important; we can't just assume it happens. We need to be intentional about building trust. So how do we do it?

David Maister has written a fantastic book on the topic (The Trusted Advisor) and he coined the phrase "Earn the right to be right." In other words, you may be right but if you have not earned the right, it does not matter. You won't be heard.

To earn the right to be right you need to first demonstrate that you are truly interested in helping, that you have the other person's best interest at heart and that you know it's not about you. Maister also says "... the motive that generates the greatest trust is genuine caring."

Once we demonstrate we truly want to help, we have earned the right to be right. Then we can be much more effective and have a much more rewarding and successful relationship with that client. After all, as Theodore Roosevelt once said, "No one cares how much you know until they know how much you care."

There's even a formula for trust for us analytical types from Maister's book:

$$T = \frac{C + R + I}{S}$$

Where:

T = Trust

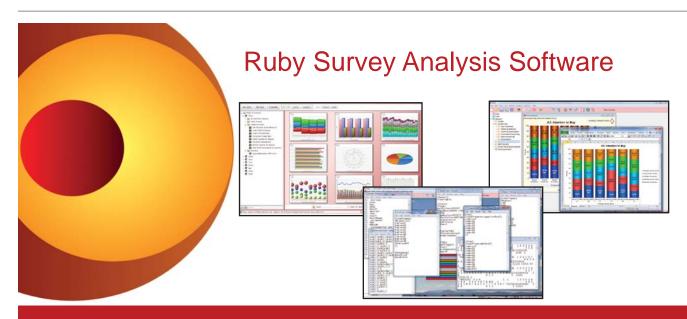
C = Credibility

R = Reliability

I = Intimacy

S = Self-orientation

Breaking down that formula, credibility and reliability are what we typically go to when thinking about how to build trust. Do you have the



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expertise? Do you have the experience? Will you do what you say? Of course these are important. But you might also say that these are the cost of entry. In fact, the creators of this formula say that the "I" or intimacy is the most important item in the numerator.

Intimacy refers to the ability to have empathy; to see another's point of view. It is being authentic and open. It represents the extent to which others feel they can confide in you and feel safe in doing so. This feeling is what moves an interaction from a transaction to a relationship.

Many researchers feel like they are not heard and believe that an accreditation for market research professionals will somehow help build that credibility – that trust, if you will. They are concerned about DIY research and believe others do not quite understand and appreciate their skill.

Accreditation may be a nice way to develop and train new researchers but don't count on it increasing your client's or prospect's trust in you. There is much more to do to build trust than demonstrating our technical skill. Our corporations are filled with fantastic researchers who are not heard because they are not trusted advisors. I have had many CMOs and CEOs ask for my opinion but I have never had one ask me for proof of technical skills or about the analytical approach we used for any particular study. They assume your competency is there.

Touting our skill or accreditation doesn't work – because it's not really about us

Take another look at the formula and note that self-orientation is in the denominator. When we focus on our skills, on how good we are, we can damage trust. The more we focus on ourselves and not our client, the more we run the risk of decreasing damaging trust. Remember, it's not about showing how smart we are. It is about doing all we can to help our client.

The following are things we might do that fall into the S category:

- We want to look like the expert we make it about us.
- We don't have the time to really understand the issue so we recommend a standardized approach that we can do quickly.

- We have a desire to be right or to look smart.
- We have a lot of other projects so we select the quick-and-easy path to execute
- We try to move off a project too quickly because we underbid the hours – before the client gets what they need.

Conversely, there are things we can do to overcome the self-orientation:

- Ask a lot of questions about the issue

 make sure you really understand
 it.
- Restate the issue and the decision the client faces to ensure you truly understand.
- Do not jump too quickly to a solution or methodology, even if a methodology is apparent.
- Ask to see and read other background material so that you can better understand the situation.
 Read it and perhaps ask questions about it.
- If on the supplier side, don't shortchange the client if you underbid your hours. That should not be his or her concern and the client should not be penalized for it. Focus on delivering what is needed and use the learning to improve your bidding process.

Try posting this formula on your wall and think through how you can leverage each aspect.

Leadership begins to rely on you

In this article we've looked at three areas that are key to influencing decisions: logic, emotions and trust. So how will you know if you're successful at influencing? I believe it's when you can claim a seat at the table, when your input becomes necessary before any major decisions are made, when leadership begins to rely on you as the unbiased and trusted advisor. To me, when you've achieved this, you've realized the full potential of our profession.

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Creative learning

A look at the unique data-gathering process behind the Harvard Impact Study

| By Jeff Vitale

snapshot

Jeff Vitale explains how a partnership with LinkedIn helped facilitate the fielding of the Harvard Impact Study, which sought to quantify the global economic and social impact of Harvard alumni.

If you were asked which U.S. college or university has had the greatest global social and economic impact through the achievements of its faculty and students, how would you answer? Harvard? Stanford? MIT? Or would you be tempted to cite one of the larger public universities boasting 500,000+ alumni such as the University of Michigan, The Ohio State University or Penn State?

In a recent study of the adult U.S. population conducted by Market Strategies International, all of the above institutions received multiple votes but Harvard was the clear leader. being mentioned on an unaided basis by one in five respondents; the others followed markedly behind. Perhaps this is not surprising, considering that venerable Harvard is the oldest educational institution in the U.S., founded in 1636 by a vote of the Great and General Court of the Massachusetts Bay Colony more than a century before the American colonies declared their independence from England.

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It's commonly believed that Harvard alumni have had a noteworthy social and economic impact but having that belief and defining the impact are different matters entirely. Getting a robust answer to this question would seemingly require a significant investment of time and resources, leading researchers and marketers to ask, "Why bother? What's the value proposition?" The answer is simple: Impact data is a measure of the return on investment for a variety of stakeholders ranging from the university itself, faculty, students, business leaders and even government agencies. The kinds of questions impact data can answer in the academic space include:

- Is it worth the investment to create centers of learning or degree programs for particular specialties or industries?
- How must the curriculum change to meet the needs of an evolving global society?
- Is funding a new building or modernizing medical equipment money well spent?
- Are federal grants likely to yield results?
- Does the university have a synergetic relationship with the local community?
- What is the expected lifetime value of a university education that an alumnus might expect?
- Does alumni diversity translate into

- impact diversity?
- Are there emerging impact trends that could result in social, economic or political evolution?

So, in January 2015, the Harvard Business School and Market Strategies teamed up to develop and execute a study that would quantify the collective social and economic impact of the living alumni of all 12 degree-granting Harvard schools as well as the Radcliffe Institute for Advanced Study in a tangible, rigorous and repeatable way.

While the results are not the focus of this article, I would be glad to send you a copy of the executive summary or you can also find more information at http://bit.ly/ilMvDfn. Instead, this article focuses on a few of the novel approaches we used to meet the objectives, including an innovative partnership with LinkedIn.

Getting lost in a forest

As you might imagine, there are almost limitless ways to measure economic and social impact, and there is the danger of getting lost in a forest when seeking the perfect tree. Working closely with Harvard faculty and leadership, we ultimately decided that the best approach was to measure a specific type of impact, which could be expanded upon in future studies. After careful thought, we settled on a measure of economic impact that assessed the ongoing entrepreneurial efforts of living

Harvard alumni.

Specifically, we defined economic impact as the aggregated annual revenues (or assets under management, in the case of financial services organizations) and employees of currently-operating profit and non-profit ventures founded in full or part by one or more living Harvard alumni. We adopted this definition because it measures a contribution that would not have existed if not for the founder's efforts. So, while a Harvard alumnus might be responsible for the success of a particular company, it would only be included in the study if that alumnus was also a founder of that company. Similarly, while you might rightly argue that a Harvard alumnus who becomes president of the United State will undeniably have global impact, it is not within the scope of this first study because presidential impact exists independently from the alumnus to a greater or lesser degree, and, as such, cannot be readily disentangled from the impact of the office itself.

In addition to non-profit entrepreneurial activities, we included alumni board service and alumni volunteer hours to augment measures of social impact. In case you're wondering, the roughly 375,000 living Harvard alumni serve on nearly 300,000 boards and collectively volunteer more than 1.6 million person-hours a month, which is equivalent to 6,575 full-time jobs. Where Harvard alumni are concerned, it is not all about economics.

Focused on methodological rigor

With the scope of the study defined, we focused on methodological rigor to ensure accurate insight. Getting a respectable response rate and minimizing the potential for response bias were two of our chief concerns, especially considering that many alumni are very busy people. Minimizing response bias is particularly important given the study questions. Any incentives of monetary value could differentially appeal to people of varied economic strata or professional success. Similarly, incentives involving donations could differentially appeal to people with different levels of social awareness or sense of responsibility. As such, we decided not to use incentives because

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the risk of non-response bias would be far too high.

Further, we determined that placing any urgent plea in the invitation letters focusing on the need to measure impact would also potentially encourage or discourage participation, depending on each individual respondent's self-assessed success level – also introducing unneeded response bias.

With two of a market researcher's best tools unavailable (incentives and urgent language), we did what we could to increase awareness among alumni and make the survey experience as easy as possible to maximize survey completes.

LinkedIn became invaluable

Increasing awareness was one of the first ways LinkedIn became invaluable. Sending a survey to all living Harvard alumni requires accurate, up-to-date contact information. LinkedIn is the undisputed social network of professionals, so advertisements urging folks who attended Harvard to update their alumni information as well as advertisements announcing an upcoming

study were efficient ways to increase awareness that have not long existed. In fact, in 2005 LinkedIn reported 5 million members; in 2006, membership had risen to 12 million. LinkedIn became truly global – by its own admission – as recently as 2008. By 2010, it had 90 million members and at the close of 2015, it boasted more than 414 million members. Suffice it to say that this is quite a potential audience.

The next step of optimizing the survey experience for online respondents also involved LinkedIn. As you may have experienced when job hunting, there is often an option to fill in some or all of the job application by logging into your LinkedIn account and automatically populating career and educational information. For individuals with long careers, this represents a great deal of information that might be very time-consuming and tedious to enter by hand. Recognizing the importance of the Harvard Impact Study as well as the benefit to LinkedIn members who wanted to participate, LinkedIn gave us special permission to develop a custom API that allowed

respondents to log into their LinkedIn accounts and automatically populate the relevant portions of the Harvard Impact Study. Knowing that fields often populate awkwardly, Market Strategies ensured that the API processed the information and presented it back to each respondent efficiently and correctly. Further, respondents were able to use simple check-boxes to include, exclude or edit each line of data. Respondents were able to add new careers and educational accomplishments as well.

This auto-population process was highly successful and many respondents reported a dozen or more positions, which would not have been practical using manual entry. Once we collected basic career data, we asked respondents foundership questions for each company or venture they mentioned. Because so much of the required information was inputted with the click of the mouse, the survey experience was simple for many respondents and optimized for others. We believe the LinkedIn integration – and the improved completeness of the data it





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Address the question of outliers

Once we collected, cleaned and validated the data using an array of secondary and tertiary research tools, we needed to address the question of outliers. As researchers, we all know about outliers and the dilemma of whether they should be kept or dropped in an analysis. Often, we are tempted to simply drop them because they don't play well with many of our statistical assumptions. Yet they can be legitimate observations and are sometimes quite interesting and important, as is the case here.

Given that measuring the total economic impact of Harvard Alumni was one of our stated goals, it would be inappropriate to drop a company like Staples or Microsoft from the analysis as an outlier simply because it has great impact. Yet, considering the sheer size of a company like Microsoft, we had to ask whether it is reasonable to include it in any population projections made from sample data. In simple terms, if a founder of the largest company in the world fills out a survey and the study response rate is 25 percent, can we assume there are another three such companies among non-respondents? The answer is probably not.

In such cases, researchers often adopt inclusion/exclusion rules based on historical experience, standard deviations from the mean, visual examination of scatterplots or even gutfeels. Often, a conservative approach is thought best and, when in doubt, outliers are excluded. Here, the goal was to get a robust and accurate estimate of impact without bias in any direction. As such, outlier companies, or "luminary ventures" as we branded them to avoid any negative connotation, needed to be identified and treated differently than the other ventures in the analysis.

To this end, our data scientists employed a simple process inspired by variance shift outlier modeling to determine appropriate cutoff points. In a nutshell, we ordered companies by revenue and then calculated the variance over and over again, adding companies of increasing size. The first meaningful spike in variance was then used as the

cutoff point and all companies with values above that level were designated as luminary ventures. These companies were so large that while we included them in the total estimates, we did not use them to make non-responder projections. We identified a number of sample records using this technique for annual revenues, assets under management and employee number and these cases were not used to make non-responder projections, improving the validity and robustness of the final projections.

Of course, non-response bias is always a possibility when making projections from survey data. In order to address this concern, we used a variety of techniques to detect any non-response bias, including:

- comparing impact metrics calculated from fully-completed versus partially-completed surveys;
- comparing data from surveys completed without reminders, a single reminder, two reminders and three reminders or more; and
- using historical alumni data to predict founding behavior via a discriminant function analysis and then scoring both alumni respondents and alumni non-respondents to detect any bias.

Extracted randoms samples

LinkedIn proved to be a useful method for assessing non-response bias as well. We extracted random samples of founder and non-founder respondents — as well as non-respondents — from the sample list and then conducted manual research using LinkedIn as a secondary data source. This helped us determine if LinkedIn members who responded were more or less likely to be founders than those who did not respond. Once again, the answer was no.

So what are the estimated 2015 global annual revenues of companies founded by Harvard alumni? Glad you asked: approximately \$3.9 trillion which, incidentally, rivals the 2014 GDP of Germany. (1)

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••• qualitative research

Seeking the complete truth

Using facial coding and body language analysis to research consumer emotions

| By Meagan Peters and Curt Fedder



snapshot

The authors outline
how facial coding and
body language analysis
can add valuable
nuance to qualitative
research by bringing
consumers' emotional
responses to the
surface.

The ability to illuminate and subsequently influence consumer perceptions and motivations is the goal of marketing research studies, whether qualitative or quantitative. Attaining unbiased, unfiltered reactions that uncover consumers' true emotional responses is challenging, whether soliciting responses to marketing materials (ads, concepts or positioning statements) or simply trying to understand consumer attitudes and behavior.

Currently, in the marketing research community, there is a great deal of interest in the application of various psychological theories to get to the heart of consumer response. One emerging technique is emotions research, with facial coding and body language analysis representing some of the leading methods for capturing emotions. The purpose of this article is to review the theory and practice of emotions research and provide examples of how the approach can be applied in qualitative research to identify true, unfiltered emotions and insights, leading to implications that can only be uncovered through the use of emotions research.

Skilled researchers, particularly qualitative researchers, are highly adept at delving into consumer perceptions and motivations through a variety of interviewing and analysis techniques, including open-ended questioning, projective techniques, laddering, etc. While these techniques go a long way in eliciting consumer response, they rely on consumers' ability to articulate their own thoughts. Whereas emotions research, facial coding and body language analysis facilitate unfiltered access to consumer feelings and perceptions.

Extensive research has demonstrated that emotions are how people form their attitudes, beliefs and opinions – the basis for their judgments, decisions and behaviors. The old adage "Think with your head, not with your heart" is no longer relevant or even factual because it is virtually impossible to make decisions that are devoid of emotions. Emotions are the lenses by which people process information and react to stimuli; we are always "feeling" or experiencing emotion.



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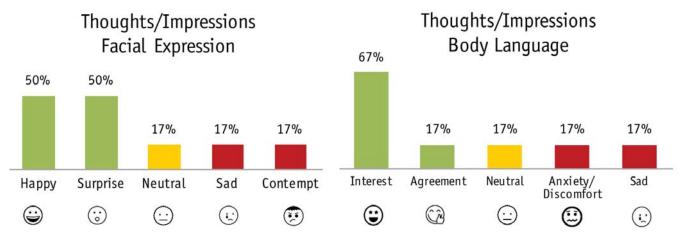
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Figure 1 Figure 2



Emotions are core to consumer behavior and thus it is incumbent upon marketers to understand consumers' true emotional response. Emotions are the primary reason consumers prefer one brand over another. Further, positive emotions toward a brand have an impact on brand loyalty. And, while people typically provide a logical argument to rationalize a purchase decision, their emotional response is often what drives the purchase in the first place.

Emotions are both conscious and unconscious. Thus, a methodology that captures unconscious emotions expressed through nonverbal behavior is a critical and insightful tool for marketers. Facial coding and body language analysis reveal how people "leak" their true emotions through expressions and movements, even when trying to be deceptive. People often try to regulate themselves but this type of coding takes that into account because emotions manifest themselves in physical, involuntary ways. Further, body language accounts for 50 percent-70 percent of communication.

Powerful, measurable points of data

Emotions are powerful, measurable points of data which complement and triangulate other information that is collected about consumers. Using a science-driven approach that relies on observable data provides richer, deeper insights to better understand consumers.

| Emotions Measured | |
|---|--------------------------------------|
| Facial Coding & Body Language Emotions | Additional Body Language Emotions |
| Anger | Joy |
| Disgust | Interest |
| Fear | Agreement |
| Surprise | Pride |
| Contempt | Boredom |
| Sadness | Anxiety/Discomfort |
| Happiness | Disapproval/Disagreement |
| | Confusion |

In this scenario, functional analysis is applied to consumers' nonverbal behavior. It relies on interpreting complex nonverbal behaviors that are automatic, involuntary and often stereotyped. Facial movements are coded based on the well-tested and renowned research of Paul Ekman. Body language is analyzed based on the scientific research from researchers such as Wallbott and Friesen. These coding systems are then applied and interpreted to identify what emotions a person is experiencing in response to stimulus material or openended questioning.

To demonstrate the application and benefits of this approach, two illustrative studies were conducted, one in which the approach was deployed to test consumer response to a print ad and the other to gain deeper insights into attitudes and behavior. Both studies illustrate how adding facial coding and body language emotion analysis to a typical qualitative research study provides deeper insights that go beyond findings based on consumers' conscious (or stated) responses, uncovering new dimensions to the findings or confirming them. This results in deeper insights into consumers, yielding more powerful conclusions and strategies that help companies be successful in the marketplace.

In-depth qualitative interviews

were conducted and video-recorded. The camera was focused on the respondent's body and face to facilitate recording of their facial expressions and body mannerisms.

The videotape was then analyzed using custom coding techniques based on study objectives and using the scientific framework previously described. Thus, the stimulus materials or reported attitudes and behavior are evaluated against a comprehensive set of emotional characteristics. Reporting merges traditional qualitative findings with emotion analysis to provide a rich understanding of consumer responses through a cohesive story.

Emotions research applied to an advertising study

In this first example, travelers were interviewed to assess their emotional response to a print ad for a hotel chain. Through typical qualitative discussion it was learned that that consumers had generally positive responses to the ad. The ad strongly communicated that the hotel chain is a place to go to relax, enjoy a spa weekend, be with your spouse and perhaps share a romantic weekend. Facial expressions were consistent with what respondents reported verbally, confirming most were happy or surprised (Figure 1). Body language suggested interest (Figure 2). The brand seemingly has the opportunity to create affinity with its audience.

But one notable respondent, a single female who potentially reflects a sizeable segment for the hotel chain, displayed emotions of sadness, anxiety/discomfort and neutrality, even though she had not verbally expressed these feelings. Use of a

Figure 3

Facial Expression

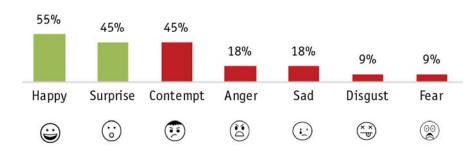
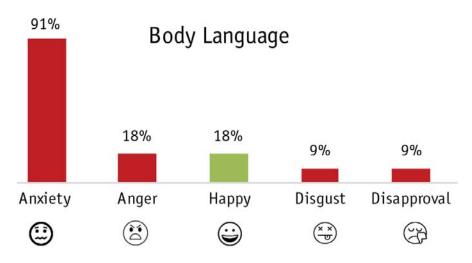


Figure 4



polarizing tagline about a couple's retreat resulted in these negative emotions. For most consumers this implied a getaway from work, family and other stresses. However, this respondent pointed out verbally that this statement excluded her because she is currently single. Based solely on what she said, this did not appear to be a major concern. However, facial coding indicated that the depth of her negative emotional response was much greater than she was able to verbalize or perhaps even know herself. More importantly, the depth of emotional response was observed only through emotions coding.

Negative emotions like these have the potential to create dissonance between consumers and brands. Based on this finding, the research recommended revising this statement. Without the emotions coding, no changes would have been suggested.

Emotions research applied to an attitude-and-usage study

In the second example, a study among Millennials was conducted to assess emotional reactions to their current financial situation and spending habits. Overall, the study revealed that while Millennials experience an underlying sense of anxiety relating to their finances, they are positive when it comes to spending money to enjoy life and pursue their dreams. This represents a state called emotional ambivalence where one simultaneously experiences two different emotions from two dimensions (positive and negative). This results in unique decision-making outcomes.

More specifically, when questioned about what they would do with extra spending money, Millennials experience anxiety/conflict/ambivalence that becomes apparent only through monitoring facial expressions and body

language. Facial expressions reveal both positive and negative emotions – surprise, happiness and contempt (Figure 3). The positive emotions reflect the pleasure Millennials gain from spending their money on indulgent or lifestyle-oriented purchases. But the negative emotions revealed, particularly in their body language (Figure 4), reflect Millennials also knowing in the back of their minds that they should be practical and more disciplined with spending on non-necessities such as eating out or travel.

There are important implications resulting from this learning. The array of positive and negative emotions Millennials experience represents a unique set of challenges for marketers. This is because these mixed or ambivalent emotions lead to a high degree of uncertainty which, in turn, influences their unpredictable and often inconsistent usage of products and services vs. prior generations. Ambivalence also leads to more creativity, suggesting that Millennials will seek or be more receptive to non-traditional ideas and offerings (e.g., apps offering financial advice).

Thus, marketing communications need to reflect the tone and texture that will resonate with Millennials' emotions by appealing to their aspirational side while at the same time addressing their concerns and apprehensions. Anxiety-reduction will be critical to success. Communication materials should attempt to combine the product message or brand promise with solutions and reassurances to help Millennials feel more secure and reduce uncertainty in their lives.

Insights that go beyond

Emotions research is a powerful tool. Understanding the emotional state of your target audience can help unlock their decision-making process. Applied to qualitative research, it can provide deep, richer insights that go beyond what might be learned in a typical qualitative research study. ①

Meagan Peters is research manager at Chicago-based Solution Partners Consulting. She can be reached at meagan.peters@ solutionpartners.com. Curt Fedder is managing director at Life Stage Research Insights, Chicago. He can be reached at curt@lifestageresearchinsights.com.

••• brand research

Marketing to the nurturance motive

Have your customers felt loved today?

| By David Forbes



snapshot

In this excerpt from
his book The Science
of Why, David Forbes
offers case studies of
products that used
motivational research
to understand how to
tap into consumers'
innate drive to
nurture.

Like a great number of animal species, it is our nature to nurture. As a part of our drive to propagate our species, we experience an instinct to make sure our offspring make it to the age where they too can propagate. And nurturing by nature goes further than the local gene pool. Animals famously "adopt" the orphaned young of other species. This phenomenon might be simply an overexpression of the instinct to nurture our own. I think that the forces of evolution may have created the instinct to take care of the small and helpless.

The drive to nurture seems at times as if it trumps other elemental drives for self-interest. Taking in orphaned infants and children and protecting and nourishing them could clearly be a disadvantage for the tribe in many ways. Helpless children and infants consume copious amounts of resources – food, shelter, transportation, energy – that all would have been precious commodities in the hand-to-mouth world of hunting and gathering. But the early human instinct toward altruism, almost certainly an emotional cousin of biological nurturance, pays off in a broader sense, strengthening the gene pool and expanding the genetic variability in the tribe. This adoptive "crossbreeding" allowed us to enhance our abilities to adapt and evolve in response to our surroundings even more quickly. Put another way: Kindness is a formidable evolutionary advantage.

As powerfully social animals we are also drawn to nurture our society, to take care of all the collective cultural accomplishments of the group, including our social relationships and connections, our material culture, our intellectual creations – the ideas, stories and legends that ground and connect the group. We are uniquely tied, emotionally if not biologically, to the artifacts and ideas with which we have filled our environment, caring for and cherishing them almost as if they were our children.

In this larger view, nurturing behavior is good for our groups or communities and, ultimately, really good for our species and our collective culture. And it's also good for us – literally, physically and in real time.





Hungry for more yet?

Concept Testing ◆ Product Testing ◆ Iterative Development Process ◆ Packaging Performance Testing

Market & Customer Segmentation ◆ Competitive Brand Image Strategy ◆ Menu Optimization

Ingredient Modification/ Degradation/Improvement ◆ Unit Remodel Evaluation

Menu Labeling Compliance Auditing ◆ Price Elasticity & Optimization

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Scientists have found solid evidence of the hardwiring that's behind our gestures of caring and cooperation. Studies show that the level of oxytocin, the soothing feel-good hormone produced in our brains, rises when we feel compassion and care for others. And recent studies show that those who volunteer have lower mortality rates, greater functional ability, reduced heart rate, lowered blood pressure, increased endorphin production, enhanced immune system, lowered feelings of stress and lowered rates of depression.

Marketing to consumers with a strong need for nurturance involves promising that your product will help satisfy their desire to care. This message can be conveyed head-on, as has traditionally been the case with food products ("Just like mom's"). Or the message can be more subtle, such as messages of protection, consideration or thoughtfulness. Hallmark (which literally built a business on our desire to nurture) ran a 2009 campaign with the tagline: "A card. It's the biggest little thing you can do."

Nurturance messages can be found in marketing related to practically any product or service connected to caring or caretaking, including self-care. In the health and beauty industry, we don't have to look far to find messages that focus on pampering, renewing or strengthening us. Olay skincare products do a good job of playing on our motivation to nurture our bodies when

they encourage women to "Love the skin you're in." Hair care marketing is rife with nurturance messages: fortify your hair with vitamins and nutrients and give it tender loving care to produce a lustrous, healthy "cared-for" look.

Although many marketing messages

from financial service companies lead with security ("You can be confident that we know how to make the most of your money") or empowerment ("You can have the knowledge and insight to invest well"), it turns out that a strong nurturance need motivates consumers' choices in this service category. Consumers often feel a need to be cared for and to trust in the professionals and institutions that help them manage their money. And the potential symbolism of savings as a "gift to your heirs" is also a significant force in this category - linked to nurturance motivation through the idea that saving or preparing for your child's future demonstrates how much you love him or her today.

Show their love

Consumers with nurturance motives seek to show their love to friends and family, to themselves and even to beloved possessions. Examples of nurturance-oriented marketing messages include the following:

- We agree that the important things in life aren't things at all.
- Show (them, yourself, it) a little love.
- We can help you show how much you

care.

- Help us help others.
- Part of our proceeds will go to children in need/breast cancer research (or similar causes).
- The makers of this product know that you are a generous and thoughtful person.
- Let us take care of the details so you can focus on what really matters.
- We'll help you spend more time with those you love.
- Feel closer to those you love.
- We understand and appreciate the beauty in life that you see.
- · We're/they're so lucky to have you.
- Thanks for always seeing the best in others.

Case studies for the nurturance motive

Frozen food

The drive to nurture manifests itself most strikingly in the context of mothering and, not surprisingly given the roots of our word for this motive (nutritus is Latin for "to suckle"), specifically in the realm of food preparation for the family.

Convenience foods pose interesting benefits for consumers seeking to care for families while leading demanding modern lifestyles but they also pose challenges. On the one hand, these products free up time and help consumers get a hot meal on the table. On the other hand, the level of convenience and lack of hands-on effort can feel almost like a cop-out to nurturant consumers whose self-image is to be good mothers or fathers, husbands, etc.

Our client wanted to understand the best ways to talk to consumers about frozen entrées. The client offered a range of frozen products and wanted to give each product its own identity. We discovered that the different products in the line emerged with different associations for the company's primary consumers; some products were geared to mastery ("Here's gourmet eating at its best"), some to identity ("Set your imagination free with an exotic new cuisine") and some to security ("You can count on this product every time").

One product emerged as an optimal candidate for enhanced nurturance positioning. It had two important qualifications: it came in a single

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family-sized portion and was designed to be baked in the oven rather than the microwave. Images for the product focused on steaming, casserole-sized meals emerging from the oven – which carried the nurturant emotional associations to grandma's dinnertime meals – updated for our modern lives.

Breakfast

A breakfast-food manufacturer was developing a new line of breakfast products for adults. We explored the atmosphere of breakfast time and the feelings that typically accompany eating breakfast and we conducted a motivational analysis to uncover consumers' unmet emotional needs and wants right at the moment when they are deciding what to have for breakfast.

Data from this analysis indicated that consumers often felt as if their awakening each morning was almost like being reborn. They experienced an urge to "care for their inner infant" at breakfast time and to send themselves off to work with a warm, loving, fortifying meal. An appetite for self-nurturance was clearly on the table at breakfast time.

Based on this insight, our client developed and tested a range of new hot cereal concepts that focused on self-nurturing ideas such as providing "a little hug for your tummy" first thing in the morning. Responses to these ideas were extremely strong and these ideas remain in the brand promise of that client's products today.

Insect repellent

The motivation to nurture can also manifest in other less-intimate forms of social behavior. A client in the insect repellent business came up against an unusual challenge. A bath oil marketed by a leading cosmetic company was rapidly encroaching on the market on the coattails of a grassroots movement for consumers to use the oil as an insect repellent for themselves and their kids.

Our client's scientists tested this bath oil extensively and found its effectiveness as a repellent to be marginal at best. Our client's products, on the other hand, contained the proven ingredient DEET and were shown in the same tests to be highly effective.

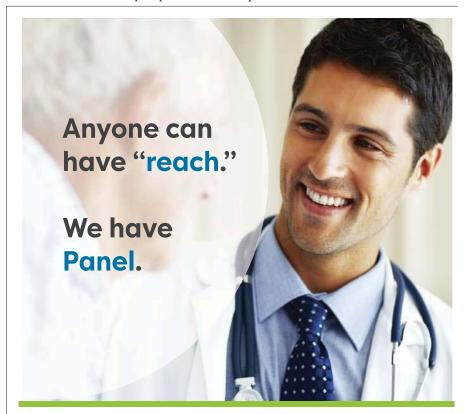
The client had always used a "problem/solution" model to illustrate

how its repellent would solve users' insect troubles. Implied emotional benefits focused on needs for security "keep my kids and me safe from these bugs"; "let us enjoy the outdoors with confidence that we won't be covered in bites."

But the results of our motivational research established that the true consumer motivation in this product category was about nurturance not security: parents used repellents on their children because they wanted to take good care of them and to be good parents. Hosts at barbecues and pool parties

provided insect repellents to their guests because they wanted those guests to be relaxed and happy and because they wanted to be good hosts.

And the fact was that offering an oily, petroleum-scented DEET-based repellent simply didn't feel like an act of nurturance. The bath oil, by contrast, went on like a lotion and smelled fabulous and it came in a package that looked as if it were intended for skin care; it featured a lot of white and soft, flowing cursive lettering. Our client's products, on the other hand, came in



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packaging that looked like it belonged in an auto repair shop, complete with harsh colors and large, black block lettering altogether not something you'd reach for to express your love.

Once our client recognized the need to speak to the nurturance motivation, the company developed new products with a lotion-like feel, attractive fragrances and packaging that resembled that of skin care products. The public response was resoundingly positive and the bath oil craze gradually disappeared.

Furniture care

One of our more intriguing projects demonstrated that even when surrounded by a world of loved ones, friends, children and pets, we still have a reserve of nurturant energy that can be directed at the inanimate objects in our lives.

A client in the furniture polish business wanted to explore motivation in the furniture care category. This client had been experiencing some challenges to its business when a competitor's "dusting aid" claimed that its products left nothing behind on the furniture and

so avoided any "unsightly buildup."

Our motivational research revealed that wood furniture, because it came from trees, continued to possess a certain "life" in the minds of consumers that needed to be nurtured. In this way, care for the wood furniture took on many of the emotional qualities of caring for living things. Deep in their subconscious, consumers felt as if their wooden furniture needed "feeding" or it would be starved and become dry and "dead."

Repositioning the product promise away from dust abatement to "giving your furniture the care it deserves" activated the nurturance motivations in the target group of homemakers.

Takeaways

- 1. The drive to nurture and be nurtured is clearly hardwired. We share the instinct with most other animals but have evolved its expression far beyond its biological roots.
- 2. Altruism and compassion strengthen the bonds within social groups and thus reinforce the powerful evolutionary advantage of "strength in numbers."

- 3. We can direct our nurturing behavior to children, family, social groups, strangers, ourselves and even inanimate objects.
- 4. Nurturing, including preserving traditions and artifacts, is one basis for the structure of our family and our
- 5. Emphasizing nurturing benefits is an appealing way to market a wide range of products from food products to child care, skin care and even furniture care.
- 6. Cause marketing has a natural target in consumers who are motivated to
- 7. Our ideals of nurturing behavior are often linked to childhood memories, to sentimental and nostalgic images of when and how we felt particularly nurtured ourselves. The images of "the way mom/grandma did it" are the pinnacle of nurturing imagery.

This article is an edited excerpt from "The Nuturance Motive," a chapter in The Science of Why, by David Forbes. Used by permission. Forbes is president of Forbes Consulting, a Lexington, Mass., research firm. He can be reached at david.forbes@ forbesconsulting.com.



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••• hybrid research

Seeking some clarity

What is hybrid quant/qual anyway?

| By Jim Bryson



snapshot

Jim Bryson uses case studies from corporate researchers to shed light on the rise in popularity of hybrid quant/qual methods.

Every couple of years, a new buzzword emerges. The industry scrambles to understand whether the newest craze is a can't-miss trend or a hyped-up fad. In the last 10 years, we have lived through the ebb and flow of online research, social media research, big data and mobile trends, among others. With each iteration, the industry buzzes with energy, new companies emerge, conference speakers hone their presentations and market researchers scamper to find ways to integrate the newest method into their proposals.

Currently, hybrid quant/qual research is all the rage. A recent survey indicated that 58 percent of corporate researchers planned to invest in new quant/qual techniques in the next 24 months. This coincides with a growing industry buzz around hybrid quant/qual research, the leading edge of a new era in research. As business-decision lead times continue to shorten and technology further improves researchers' ability to integrate different types of data, the distance between methodologies will shrink and begin to blur, creating faster, more agile research capabilities than we have ever imagined.

We hear researchers discussing hybrid quant/qual at conferences. We talk to clients who say they are using the method – or at least they want to. What is all the hype about?

Because research suppliers all seem to have their own definition of hybrid quant/qual, we decided to take that question directly to the ultimate user – the corporate researcher. We interviewed several corporate researchers by phone and in person and asked them what they considered to be hybrid quant/qual and how they see it differing from traditional research.

Why so excited?

For decades, accepted research methodology has consisted of an exploratory qualitative research phase followed by a validating quantitative phase. Isn't this a hybrid quant/qual method? If so, why are so many researchers excited about so-called "hybrid" quant/qual methods?

Our research revealed that there is no consistent definition of the term. Even so, there were





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some consistencies in the inconsistency.

First, to corporate researchers, hybrid quant/qual does not include the traditional phased approach, defined as focus groups followed by a survey. Hybrid quant/qual means something different. But the definition of "different" is consistently inconsistent.

Second, the term is used as a generic descriptor rather than a descriptor of a particular methodology or technology. The specific methodology any one researcher attaches to the term appears to depend entirely on their experience with any type of non-traditional mix of quantitative and qualitative techniques.

Third, hybrid quant/qual is a term that often serves as a placeholder for any mix of quantitative and qualitative research. These researchers did not make a distinction between hybrid quant/qual and hybrid qual/quant. The terms were generally interchangeable.

As just mentioned, hybrid quant/qual is a generic descriptor for research using a quantitative survey combined with any number of qualitative methods, except focus groups. Any hybrid method that included a survey with focus groups was simply traditional research design and not fitting for a 21st century buzzword.

Surprisingly, several of the corporate researchers we talked with associated hybrid quant/qual with fairly new – but successful – methods they have used to combine ethnographic and quantitative research. They use ethnographies as a qualitative technique to get deeper and more contextual information than focus groups and follow that with a quantitative survey.

We expected to find hybrid quant/ qual associated with online qualitative since hybrid is often a term used in online method discussions. Among our respondents, that was not the case. Even so, many researchers attributed speed of completion as a primary characteristic of hybrid quant/qual research compared to traditional phased research since it merges the disciplines to eliminate delay and speed the delivery of insights to drive decisions.

So today, hybrid quant/qual appears to be a generic term that is presumed to promise faster research turnaround but its definition and execution is murky at best. We expect this murkiness to clear in the months and years ahead as technology and methods mature, become more integrated and more mainstream.

To better clarify the term, here are three case studies of different hybrid quant/qual approaches that effectively address common marketing problems.

Concept testing. A global cleaning company wanted to introduce a new cleaning product. It used a hybrid quant/qual methodology to marry its existing quantitative concept testing design with the opportunity to go deeper with follow-on qualitative. In this instance, the qualitative methodology selected consisted of 25 Webcam interviews with participants who responded positively to the concept during the survey phase.

Results: The hybrid quant/qual design yielded critical new insights in this case because the original concept was slightly misunderstood. The concept performed well in the quantitative test. However, during the follow-up IDIs, respondents asked questions about the concept that revealed a significant flaw in the design from the respondents' perspective. Based on this information, the design team tweaked the product and the concept to overcome the problem. Because this

was a hybrid approach, costs were low as there were no additional recruiting costs and negligible additional incentives. Plus, the follow-on interviews were conducted concurrently with the survey so no additional research time was required for the revealing qualitative portion.

Customer satisfaction problem resolution. A major credit card company discovered a problem with cardholder services that needed to be understood and addressed. A typical research project to address this issue would require sixto-10 weeks including an RFP, proposal, selection, design, fielding and analysis.

Since time was of the essence, sixto-10 weeks just to complete the research was simply not feasible. The research team decided to adopt a hybrid quant/qual approach using their ongoing customer satisfaction survey. From the customer satisfaction survey, a sample of customers who were dissatisfied with the service were given the opportunity to opt into an online bulletin board discussion. An additional random sample opted in to a different bulletin board discussion starting two days later than the dissatisfied group.

During the bulletin board discussion, both groups talked about the credit card service including the low-performing service in question. After a discussion of the problems, the groups identified potential solutions. Suggested solutions from each group were shared with the other group to identify the solution that resolved the problem most effectively for both groups.

Results: Within one week of launching the customer satisfaction survey, the research team had in-depth information about the service problems,



had generated multiple solutions and had vetted those solutions among both a random sample of customers and a sample of dissatisfied customers. Not only was this research methodology much more budget-friendly than the traditional solution, the speed of discovery kept a significant number of cardholders from discontinuing their card.

Social media campaign

effectiveness. A global auto company planned a heavy social media campaign during a major sporting event. The company wanted real-time feedback on the social media messaging but was dissatisfied by panel options that were often long-after-the-fact retrospectives.

The company selected a quant/qual hybrid methodology to obtain the needed respondents with deeper insights into the message and reveal how the company might improve its efforts for the next event.

Immediately after the event, the brand recruited respondents directly from the Facebook page created especially for the event. Respondents clicked into a short quantitative survey and were then given the opportunity to opt into a short bulletin board discussion about the event and the brand's participation in it.

Results: The entire research project was completed within three hours of the event's conclusion. The next morning, the marketing team reviewed results and integrated the findings into their next campaign. Because of the quant/qual integration, the cost was a very small piece of the overall campaign budget and yet the ROI was significant.

Continue to grow

So what makes a hybrid study special? Hybrid studies are generally thought to be faster and less expensive than traditional phased studies. Traditional methodology consists of separate phases with separate samples and a time period between the phases when analysis is performed that informs the next phase. This method has worked well for decades. However, it is too slow and expensive for many business applications. Hybrid methods eliminate key cost-drivers and timeeaters to deliver a mix of quantitative and qualitative information faster and less expensively than traditional

methods. Because of their speed and cost advantages, we expect hybrid methods to continue to grow as a common methodology in the marketer's research toolbox.

Hybrid studies as we've outlined them in this article are simply intermediaries. As Blockbuster was the intermediary between VHS and Netflix, so hybrid is the intermediary between traditional, phased research and fully integrated research.

In the future, the terms qualitative and quantitative will very likely

disappear from the research lexicon. Even the term hybrid quant/qual will disappear. Researchers of the future will look back in confusion that we considered the two as separate disciplines. With hybrid quant/qual integration and the text analysis techniques on the horizon, that future of truly integrated quant/qual is not so far away. 0

Jim Bryson is founder and president of 20/20 Research, Nashville, Tenn. He can be reached at 615-777-2020 or at jimb@2020research.com.



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Names of Note

In Memoriam...

- Movie market researcher Richard Del Belso died on March 5 at the age of 76. He joined Warner Bros. as VP market research in 1980. Del Belso also worked as research director for Universal Pictures and was a member of the Academy of Motion Picture Arts and Sciences.
- Nielsen, New York, has promoted Megan Clarken to president of product leadership.
- Los Angeles online research firm SoapBoxSample has named Alon Hartuv as vice president, product development and innovation.
- Canada-based mobile advertising platform Go2mobi has appointed Jake **Dolce** as vice president of national brand sales. He will be based in the firm's New York office.
- In New York, Ipsos has appointed **Janet Oak** as senior vice president of the Millennials, Kids & Family Center of Excellence.
- Natalie Robuck has been named senior director, U.S. business development for Tokyo-based GMO Research Inc.
- New York-based digital marketing agency iCrossing has appointed Paula



quirks.com/articles/2016/20160511.aspx

Jago as its head of U.K. operations. She will be based in London.

■ Gina Jaeger has joined Iselin, N.J., researcher Schlesinger Associates as account director, Schlesinger Qualitative. She will be based in the firm's Chicago office. Additionally, Pam Lintner, vice president, Schlesinger



Jaeger

Qualitative, is relocating from the Chicago office to Cincinnati.

- Chris Havemann, founder and former CEO of Plano, Texas, firm Research Now, has joined the board of U.K. research technology firm RealityMine. He will serve on the board as a nonexecutive director.
- U.K. research agency Join the Dots has appointed the following as the company expands its operations in Manchester, U.K., and Singapore: Paul Das as a research director; Lindsay Hart as an associate director: Bri McIntosh as senior research manager and Hollie Clark as senior research executive.
- Chuck Maniscalco has joined Chicago-based strategy and research company Shapiro+Raj as chairman.
- U.K. research agency 2CV has promoted Adam Short to managing director of 2CV London, Sabine Cronick to head of quant and Nicola Godfrey to head of qual.
- U.K. nonprofit organization NatCen Social Research has appointed Guy **Goodwin** as its chief executive. He will join NatCen on May 3, 2016 from the Office for National Statistics, where he is the director of social and analysis.
- John Houghton has been pro-

moted to executive vice president for Stamford, Conn.. firm RTi Research.





Bennett



- In Fresno, Calif., research technology firm FocusVision has
- Fladland named Jamin Brazil as the company's new CEO. Eric Grosqoqeat, who served as CEO of FocusVision for eight years, has stepped down to pursue other opportunities.
- Blue Ash, Ohio, firm MarketVision Research has appointed Nicole **Schoenberger** as a research assistant for the firm's market research online communities team.
- The Interactive Advertising Bureau, New York, has promoted Chris Glushko to vice president, marketing.
- Time Inc. UK, London, has appointed Michel Koch as CMO, a newly created role.
- Verto Analytics has appointed **Alison** Murdock as senior vice president of marketing based out of the firm's San Francisco office. Michael Read has been appointed as managing director, U.K. for the firm's new London office.
- Clemson, S.C., firm Sparks Research has named John-David McKee as chief strategy officer.
- Michael Fisk has been named execu-

tive vice president of international marketing for Santa Monica, Calif., entertainment company Lionsgate.

- In Culver City, Calif., **Christine Birch** will rejoin Sony Pictures as executive vice president, domestic creative marketing strategy.
- Phyllis Macfarlane, global training director at *GfK*, and **Jake Steadman**, director of international research at Twitter, have been elected to the main board of the *Market Research Society*.
- New York-based marketing and communications network MDC Partners Inc. has named **Stephanie Nerlich** as CMO and managing director Canada.
- New York customer experience consulting and mystery shopping firm Coyle Hospitality Group has named **Karen** Murray as its new vice president of sales and marketing.
- Jim Tobolski has joined New York-based marketing technology and data analytics company RevTrax as EVP, sales and customer success.
- Gary Laben has been chosen as the new CEO of Plano, Texas, firm Research Now, effective March 29. He will also become a member of the board. He succeeds former President and CEO Kurt Knapton, who tendered his resignation in October 2015 but remains on the board. Additionally, John Rothwell, the company's COO, has been appointed as president and COO.
- Marketing agency VML Singapore has appointed RP Singh as head of regional media, Alex Guimares as projects director and Camila Martins as director consumer insights and analytics Singapore.
- In Toronto, digital agency Razorfish has hired Marco Bailetti as vice

president of data science.

■ Alan Mavretish has joined research company Schlesinger Interactive, Iselin, N.J., as vice president, client development. He is based in Pittsburgh.



Mavretish

- In New York,
 predictive analytics software
 developer Dataiku has appointed
 Carole Offredo as the new VP
 of marketing. The firm has also
 appointed Mehdi Bouarek as VP of
 sales for the Americas, based in San
 Francisco.
- Wellesley, Mass., targeted marketing solutions company inStream has appointed **Dekkers L. Davidson** to its board of directors.
- Michelle Gordon has joined New York public relations agency MWWPR as senior vice president, research and insights.
- Toronto-based financial services group Manulife Financial Corporation has appointed **Cindy Forbes** as chief analytics officer.
- Irvine, Calif., firm MFour Mobile Research has hired **Sean Bahrami** as a software engineer for the firm.
- Michael Zimbalist has joined New York-based marketing technology company Simulmedia as CMO.
- Michael Monroe will join The Atlantic, Washington, D.C., as vice president of marketing/head of Re:think, The Atlantic's creative marketing group based in New York.
- Snapchat, Venice, Calif., has

named **Ali Rana** as head of audience and brand solutions and **Gunnard Johnson** as head of quantitative ads research.

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News notes

■ Nuremberg, Germany, firm **GfK** confirmed in March that, represented by the Supervisory Board, it has initiated civil proceedings against the former CEO of the group, Klaus Wübbenhorst, and the former CFO. Christian Weller von Ahlefeld, in the District Court Nürnberg-Fürth. The firm is seeking to recover damages in relation to tax irregularities in Turkey that the company already announced in January 2013. A first oral hearing took place in the District Court Nürnberg-Fürth. Out-of-court negotiations are being conducted in parallel to the ongoing legal proceedings. The ongoing investigation, which is being conducted with external, independent experts in Turkey and Germany, was initiated by the current management board at the end of 2012. In the opinion of GfK, the defendants breached their supervisory duties due to insufficient oversight. During the time period in which the violations occurred and GfK subsequently incurred the damages, Wübbenhorst was the board member responsible for Turkey and the chairman of the management board of GfK Turkey. Weller von Ahlefeld was the management board member responsible for financial and control systems during that same time period. These developments have no impact on GfK's Turkish operations and have not



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affected clients.

- Palo Alto, Calif., online polling firm **SurveyMonkey** is laying off 100 employees or about 13 percent of its workforce, with layoffs primarily coming from its enterprise sales team.
- Reston, Va., firm **comScore** has been certified as a Validated Digital Advertising Assurance Provider through the Trustworthy Accountability Group Anti-Piracy program, which helps keep brands safe from appearing on sites with questionable activity such as pirated content.

Acquisitions/transactions

- New York-based research firm Millward Brown has agreed to acquire the business operations of Analytics Quotient, a marketing analytics company based in India. The Analytics Quotient leadership team and its approximately 400 employees will become part of Millward Brown Analytics and continue to be led by Pritha Choudhuri, Analytics Quotient CEO and a company founder.
- New York social media marketing firm **Clickable** has acquired San Francisco-based analytics platform **Talkwheel**.
- Van Nuys, Calif., data collection firm **ISA**, a sister company of Los Angeles-based research and data analytics firm Lieberman Research Worldwide (LRW), has acquired Austin, Texas, communities platform icanmakeitbetter and its parent company Sentient Services. Both LRW and ISA will offer online communities to their clients. This is the first in a planned series of acquisitions that the LRW group of companies will make related to its decision in 2015 to partner with and take on growth capital from Tailwind Capital Partners. Paul Janowitz, founder and CEO of icanmakeitbetter, and the current

- management team will continue on in their current roles at Sentient.
- Columbia, Md., performance marketing agency Merkle has acquired Comet Global Consulting, a U.K.-based customer solutions firm. This is the third and largest European acquisition in less than a year for Merkle.
- Nielsen, New York, has completed its acquisition of Pointlogic, a Netherlands-based software firm. The acquisition further extends Nielsen's data and planning assets across its Watch and Buy divisions and advances the adoption of Nielsen Total Audience data, including Digital/Total Ad Ratings and Digital/Total Content Ratings around the world. The acquisition provides the opportunity for Pointlogic to strengthen and better leverage the company's product portfolio.
- San Jose, Calif., user experience research platform **UserZoom** has acquired Mountain View, Calif., research technology company **YouEye**.
- San Antonio-based marketing services firm Harte Hanks has acquired marketing consulting firm Aleutian Consulting Inc., which will operate as Harte Hanks Consulting. Purchase details were not disclosed but Harte Hanks expects this transaction to be accretive to 2016 performance. In conjunction with the acquisition, Harte Hanks has opened a new office in downtown Denver to accommodate Aleutian's Denver-based consulting staff and Denver-based Harte Hanks employees.
- Nielsen, New York, has completed its acquisition of India-based mobile usage measurement firm Informate Mobile Intelligence. The acquisition will help Nielsen enhance its measurement portfolio in the mobile space in markets across Europe, Asia-Pacific, Latin America and Africa. The acquisi-

tion's primary objective is to enable Nielsen's Total Audience measurement strategy in developing and international markets.

- Rhinebeck, N.Y., marketing services firm Phoenix Marketing
 International has acquired Sterling
 Research Group to expand its existing customer experience offerings. The division has been branded Phoenix
 Sterling and will be run by Leslie
 Martin, managing director. Sterling's offices will remain in St. Petersburg,
- Media organization The New York Times Company has acquired HelloSociety, a Santa Monica, Calif., digital marketing agency and portfolio company of start-up incubator Science Inc. The acquisition will integrate HelloSociety's tools, talent and approach into the service suite of T Brand Studio, the Times Company's content agency. The acquisition was an all-cash transaction that closed on March II.
- Media and digital communications company **Dentsu Aegis Network**, London, has acquired digital data analytics firm **Cardinal Path**, which is co-headquartered in Chicago and Vancouver.
- San Francisco-based app intelligence platform **App Annie** has acquired San Francisco app marketing data company **AppScotch**. This is App Annie's third acquisition in two years.
- Quincy, Mass., digital solutions firm **Propel Marketing** has acquired Cambridge, Mass., marketing platform **ThriveHive**.

Alliances/strategic partnership

■ New York-based media brand Viacom and Reston, Va., firm comScore have formed a multi-year partnership for cross-platform measurement, marking the first cross-platform deal for the newly-merged comScore and Rentrak. Viacom will have access to comScore's set of cross-platform measurement tools and demographic capabilities, which span the linear TV, video-on-demand, digital and over-the-top environments. In turn, the data will be translated by

Viacom's proprietary suite of Vantage advertising products and available for use as a currency for transacting, providing value to marketing partners by delivering a complete view of the consumer in the industry.

- San Jose, Calif., firm **Adobe** and Reston, Va., firm comScore have formed a global strategic partnership to provide new insights into the media consumption behaviors of digital audiences. The partnership will deliver cross-device audience measurement of video and ad content, providing insight into consumer viewing behaviors for better media planning and buying. Through the partnership, comScore is incorporating new Adobe Certified Metrics, standardized digital census data built on the Adobe Platform and powered by Adobe Analytics, into its Cross Media, Audience and Advertising Product Suites. In addition, Adobe will integrate comScore audience data, including demographics, for Adobe Marketing Cloud customers.
- **GfK**, Nuremberg, Germany, and Singapore-based audience data firm **Eyeota** have formed a partnership, making GfK's regional purchasing power data available to advertisers in the United Kingdom and Europe, allowing them to tailor their online advertising to specific income target groups by region. Eyeota will protect consumers' privacy by providing only anonymous user profile data linked with separate, region-based statistical target group data. With Eyeota's data digitalization capability, media buyers can access digital audience information the same way they do for offline media. The partnership consolidates several GfK data sets in one single source, enabling advertisers to tailor their pan-European campaigns on a regional basis for their online target audiences.
- Shelton, Conn., research firm SSI and AccorHotels, a France-based hotel operator, have launched Club Opinions, a new loyalty rewards program. The initial phase of the program targets Le Club AccorHotels loyalty members in Australia, Brazil, China, Germany and the United States. Le Club AccorHotels will provide SSI and its clients access to international business travelers and Le

Club AccorHotels members who enroll in the Club Opinions program will earn points by participating in surveys and sharing their opinions.

Association/organization news

- In a note to members updating them on the proposed merger of the two organizations, CASRO and MRA indicated that their respective boards of directors have agreed to a letter of intent to accelerate planning to combine their resources. Detailed information will be provided to members over the next few months so that all members in good standing can be well-informed to vote regarding the establishment of this new association. While CASRO and MRA are committed to continuing their own services, events and initiatives throughout 2016, the boards and staffs also will be working to develop the framework and member benefits for the new associa-
- CASRO representatives met in March with leaders from Canada, the U.K., the Netherlands, Australia, Japan, Austria and other nations in London at the TC225 Meeting on Market Opinion and Social Research to discuss updating the ISO 26362 access panel standard. Also on the agenda was the new draft ISO standard for digital analytics and Web analyses.

Awards/rankings

■ The American Marketing Association Foundation has named Cait Lamberton, associate professor of business administration and Ben L. Fryrear Faculty Fellow at the University of Pittsburgh's Joseph M. Katz Graduate School of Business, as the recipient of the 2016 Erin Anderson Award. Lamberton received the award at the AMA Winter Marketing Educators' Conference in Las Vegas. Recipients are chosen based on the impact of their research publications and on the degree to which they exceed expectations in mentoring doctoral students and junior faculty members.

■ The American Marketing
Association, N.Y. Chapter has selected
the following as 2016 inductees to its
Marketing Hall of Fame: Bob Greenberg,

founder, chairman/CEO of New York digital agency R/GA; John Hayes, former CMO of American Express and marketing strategist/author Al Ries.

- The Advertising Research Foundation, New York, announced the winners of the 2016 David Ogilvy Awards, which celebrate the role of findings that inspire great advertising. The Grand Ogilvy Award was given to Nestlé Lean Cuisine for its #WeighThis campaign. The following campaigns were all Gold winners: In the Big Data category: Big Data Decisions Drive Lifecycle Marketing by Warner Bros. Pan. In the Creative Effectiveness category: #WhoWillYouHelp by Ontario Women's Directorate. In the Cross-Platform category: United We Grill by Kingsford Charcoal. In the Innovation category: "Flying Ragweed" and "Green Fields" by Ragwitek and Grastek. In the Media category: Boeing Innovation Series by Boeing. In the Mobile category: The Impact of Native Mobile Video Ads on Key Brand Metrics by Opera Mediaworks and comScore. In the New Audiences category: Finish It by truth. In the Social Media category: #WeighThis by Nestlé Lean Cuisine.
- Belgium-based researcher InSites
 Consulting has received the GOR
 Best Practice Award for its Insight
 Activation Studio SaaS solution
 by the German Online Research
 Association. The award recognizes the
 best of innovation in research.
- Magid Abraham, chairman and cofounder of Reston, Va., firm comScore, received the Lifetime Achievement Award as part of the Advertising Research Foundation's Great Mind Awards series. The award recognizes individuals who have made significant and fundamental contributions to the research industry.
- Jupiter, Fla., research firm **Quick**Test/Heakin announced that it
 was a contributing agency to two
 Shopper Marketing Effie (SME)
 Awards, which were presented at
 the Path to Purchase Institute's
 Shopper Marketing Summit Awards
 Celebration in March. In the MultiBrand Shopper Solution category,

Walmart and Starcom MediaVest
Group won a Silver SME for "Chosen
by Kids," along with contributing
agencies Shopper Events, The Martin
Agency, OneKreate and Quick Test.
And in the Seasonal/Event category,
Walmart and Starcom MediaVest Group
won a Gold SME for "Chosen by Kids,"
with contributing agencies Shopper
Events, The Martin Agency, OneKreate
and Quick Test. Quick Test provided
respondent recruiting, event staffing
and management for the event,
interviewing 1,000+ children for the
kid-curated Top Toys list.

New accounts/projects

- Nielsen, New York, and Studio City, Calif., media production company Crown Media Family Networks
 have expanded their relationship to provide advertisers new services. The additional service licenses include N-Score, Nielsen Buyer Insights and Nielsen Catalina Solutions' AdVantics Rx, powered by Crossix. These new capabilities enable Crown Media to provide agency and advertising clients with greater insights into their audience and deliver a value proposition that turns viewing data into revenue metrics.
- India-based research and analytics firm Cross-Tab Group has signed a multi-year mandate worth up to \$25 million with London-based researcher **Kantar Group**. In accordance with the agreement, Cross-Tab would operate as the strategic outsourcing partner for Kantar in India for a period of four years. Cross-Tab Group will also launch a dedicated services, innovation and incubation facility in India exclusively for Kantar, which will provide a range of services including testing new technologies and methodologies and developing technology-based solutions for automation and value addition. The firm has started hiring more staff for the new facility.
- Nielsen, New York, and Capitol Broadcasting Co., Raleigh, N.C., have signed a renewal agreement for Nielsen's local television measurement service. The agreement provides Capitol Broadcasting with continued access to Nielsen local TV ratings

- and renews its licenses to Nielsen Scarborough and Nielsen Local TV View (NLTV). Scarborough provides stations with local market qualitative insights into consumers' consumption, lifestyle, shopping and media habits. With NLTV, local stations can analyze viewing within and across their coverage area. Additionally, NLTV enables Capitol Broadcasting to create custom trade areas to better understand its target audience as well as customized audience samples by key characteristics.
- Boise, Idaho, grocery chain **Albertsons Companies** has selected Chicago-based researcher IRI as its preferred partner for point-of-sale data, consumer panel insights and strategic growth initiatives to support joint business collaboration. Under the agreement, IRI will become Albertsons Companies' preferred insights provider of category hierarchy and geographies data, which will help the grocer create a single source of truth for shopper and market information. IRI will also facilitate collaboration between Albertsons Companies and its manufacturer partners. For Albertsons' manufacturer partners, the partnership provides access to data sets from the 18 banners that make up Albertsons Companies for increased ability to drive growth.

New companies/new divisions/relocations/expansions

■ Nuremberg, Germany, researcher **GfK** is further developing the setup of the North America business. The business currently consists of two separate sectors, which are being more closely combined under the One GfK strategy. The result will enable GfK to offer its range of services in North America in a more integrated manner. Gary Cofer has been appointed as the new lead for the joint North America business. Following similar integration in other countries, GfK is bringing both the Consumer Choices and Consumer Experiences sectors in North America closer together. Previously, GfK's North America business was led by David Krajicek (for the Consumer Experiences sector) and Tom Dailey (for the Consumer Choices sector). Krajicek

has been member of the management board of GfK since the beginning of the year and Dailey is taking over a global leadership role in GfK's Operations.

- Norwalk, Conn., analytics and data management firm Marketing Management Analytics has opened a new office in London. The office will be led by Managing Director of EMEA Nigel Foote.
- Branford, Conn., firm **Touchstone Research Inc.** is expanding its Youth & Family qualitative in-person and online services to cover key geographic regions across the United States.
- Piscataway, N.J., research solutions and data collection firm Azure Knowledge Corporation has opened a new office in London. The firm also has plans to set up offices in Moscow, Sao Paulo and Shanghai in the future.
- Chapel Hill, N.C., firm **FGI Research** & Analytics (FGI) and Greensboro, N.C., marketing services firm Web **Decisions Group** (WDG) have merged to form Data Decisions Group, which will offer services such as consumer data and lists, customer panels and insight communities, research and analytics (segmentation, descriptive, predictive) and more. Mike Hail, CEO of WDG, will assume the same role at Data Decisions Group. David Wilson, CEO of FGI, will serve as president and COO, David Schneider will serve as EVP, business development and Dino Fire will serve as chief science officer.
- London-based communications group **WPP**'s Data Alliance is expanding into Indonesia to meet demand from local agencies and clients to leverage data, with a focus on social, e-commerce and mobile. Indonesia is the fourth major market to launch Data Alliance, following India, Sub-Saharan Africa and North America. The Data Alliance Indonesia chapter is being championed by GroupM's Mindshare, MediaCom, Maxus and MEC, Kantar Worldpanel, Millward Brown and TNS, as well as OgilvyOne, Grey, JWT and Kinetic. Data Alliance Indonesia will be led by Country Head Wijaya Santoso and will be aligned with WPP's Data Alliance headquarters in New York.

■ Englewood, Colo., data and analytics firm IHS and London-based financial information services firm Markit have agreed to combine in an allshare merger valued at \$13 billion to form IHS Markit, an information, analytics and solutions firm. The transaction has been unanimously approved by the board of directors of each company. The new firm will be headquartered in London and have certain key operations based in Englewood, Colo. IHS shareholders will own approximately 57 percent and Markit shareholders will own approximately 43 percent of the combined company on a fully diluted basis. Jerre Stead, IHS chairman and CEO, will assume the role of chairman of the board of directors and CEO of IHS Markit. Lance Uggla, chairman and CEO of Markit, will be president and a member of the board of directors. The board of directors of the combined company will be comprised of 11 members, with IHS designating six members (including the chairman) and Markit designating five members (including the lead director) from their current boards.

Research company earnings/financial news

■ Crimson Hexagon, a Bostonbased social media analysis software

- provider, has raised \$20 million in growth equity financing in a round led by Sageview Capital. The funding enables the firm to add capabilities to its solution while also expanding its global sales and marketing team and infrastructure.
- Columbia, Md., marketing agency **Merkle** has reported net revenue of \$435 million, a 14 percent increase over 2014 revenue of \$382 million.
- Englewood Cliffs, N.J., mobile video insights and technology company **NAILBITER Inc.** has reported revenue growth of 178 percent in Q4 2015, its first quarter-on-quarter performance.
- U.K.-based pharmaceutical and consumer strategic marketing group Cello Group plc has reported £157.3 million in revenue for 2015, a decrease from £169.9 million in 2014. Gross profits were up 7 percent to £86.7 million compared to £81 million in 2014.
- U.K. research agency **BrainJuicer** released its financial results for the year ending December 31, 2015. Revenue grew 2 percent (3 percent in constant currency) to £25.18 million compared to £24.65 million in 2014. The firm also saw 4 percent gross profit growth to £20.25 million compared to £19.41 million in the previous year.

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CALENDAR OF EVENTS

••• can't-miss activities

The Mobile Marketing
Association will hold the
MMA Mobile Marketing
Leadership Forum on May
10-11 in New York City. Visit
www.mmaqlobal.com.

AAPOR will hold its 71st Annual Conference on May 12-15 at the Hilton Austin in Austin, Texas. Visit www.aapor.org.

L&E Research will hold a one-hour Webinar, titled 'How to Write Better Screeners to Get the Right Respondents,' on May 13 at 12:15 p.m. CST. Visit http://info.leresearch.com/screener-webinar-quirks.

ESOMAR will hold its Asia-Pacific conference on May 17-19 in Tokyo. Visit www. esomar.org.

Unicom will hold its Testing Showcase Dublin conference on **May 19** in **Dublin**. Visit www.unicom.co.uk.

20|20 Research will host a one-hour Webinar, titled 'Strange Bedfellows: How to Leverage Both Traditional and Online Qualitative Research,' on May 24 at 11:00 a.m. CST. Visit http://bit.ly/1VNjSnl.

LIMRA will hold its 2016
Marketing and Research
Conference on June 1-3 at
Disney's Grand Floridian Resort
and Spa in Lake Buena Vista,
Fla. Visit www.limra.com.

The Strategy Institute will hold the 6th Annual Digital Marketing for Financial

Services Summit on June 2-3 at the Sheraton Centre in Toronto. Visit www. financialdigitalmarketing.com.

ESOMAR will hold its Summer Academy 2016 on June 5-9 in Amsterdam. Visit www.esomar.org.

CASRO will hold its annual Technology and Innovation Event on June 6-7 in New York City. Visit www.casro.org.

IIR will hold its Marketing Analytics and Data Science conference on June 8-10 at the Hilton Financial District in San Francisco. Visit www. iirusa.com/analytics/home.xml.

The Conference Board will hold its Annual Brand Conference on June 9-10 at the Westin New York at Times Square in New York. Visit www.conference-board.org.

EphMRA will hold its Healthcare Business Intelligence/Analysis Conference on **June 21-23** in **Frankfurt, Germany**. Visit www. ephmraconference.org/home.

AMA will hold its 2016
Marketing and Public Policy
Conference on June 23-25 at
California Polytechnic State
University in San Luis Obispo,
Calif. Visit www.ama.org/
publicpolicy.

NMSBA will hold its Shopper Brain Conference on June 23-24 in Chicago. Visit www.shopperbrainconference. com/chicago. The Strategy Institute will hold its Digital Customer Experience Strategies Summit Europe event on June 30-July 1 in Central London. Visit www.digitalcustomerexp.co.uk.

The Merlien Institute will hold its MRMW North America conference on July 18-19 in Fort Worth, Texas. Visit na.mrmw.net.

The Australian Market and Social Research Society will hold its National Conference on September 8-9 at the Grand Hyatt in Melbourne, Australia. Visit www.amsrs.

The Merlien Institute
will hold its MRMW Europe
conference on September
14-15 at the Millennium
Hotel Mayfair in London. Visit
eu.mrmw.net.

Richmond Events will host The Market Insight Forum USA on September 15 at the Harvard Club in New York. Visit us.marketinsightforum.com.

ESOMAR will hold its annual Congress on September 18-21 in New Orleans. Visit www. esomar.org.

The Strategy Institute will hold its 3rd Annual Digital Customer Experience Strategies Summit on September 21-22 in Chicago. Visit www. digitalcustomerexp.com.

Sawtooth Software will hold its Sawtooth

Software Conference 2016 on September 26-30 in Park City, Utah. Visit sawtoothsoftware.com/training/conferences.

NMSBA will hold its Shopper Brain Conference - Europe on October 20-21 at Hotel Casa400 in Amsterdam. Visit www.shopperbrainconference. com/amsterdam.

The Strategy Institute will hold its 2nd Annual People Analytics Summit Canada event on October 25-26 in Toronto. Visit www. peopleanalyticscanada.com.

The American Statistical
Association will hold its
International Conference
on Questionnaire Design,
Development, Evaluation and
Testing (QDET2) event on
November 9-13 at the Hyatt
Regency Miami in Miami. Visit
www.amstat.org.

ESOMAR will hold its Big Data World conference on **November 15-17** in **Berlin**. Visit www.esomar.org.

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

2016 Focus Group Moderator Directory

Following is a list of over 240 moderators at 138 firms. These firms have paid to be included in the magazine version of the directory. The directory has three sections. The first section lists all the firms alphabetically and includes their contact information along with the names of the moderators they have on staff. The second section cross-references firms by the industries and markets they specialize in and the third section is a personnel cross-reference of the moderators. For your convenience, this directory is also available at www.quirks.com. (The online version lists 1,000 moderators at nearly 900 firms.)

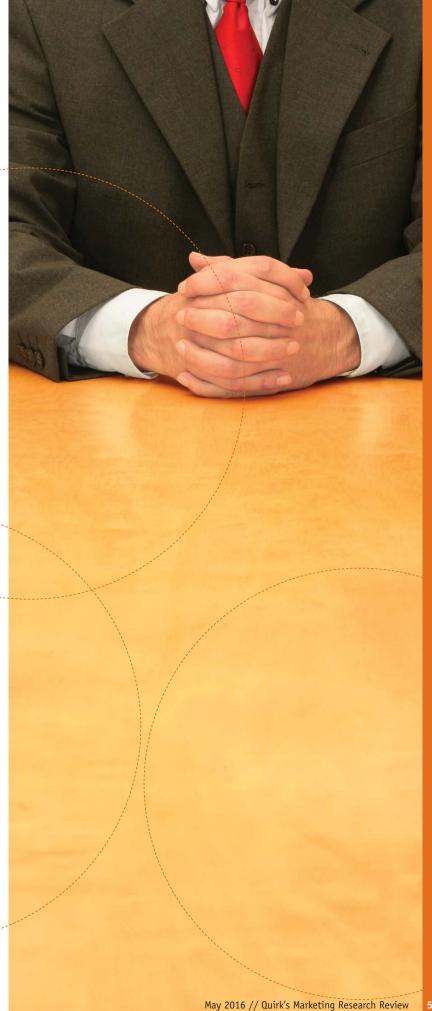
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A searchable version of this directory is available at www.quirks.com



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ARG, a SurveyService company, specializes in understanding behavior, attitudes and decision-making, utilizing custom-designed research solutions to drive growth, innovation and change. We believe that the success of any qualitative study is dependent upon the skills of the moderator, a well-thought-out study design and respondent screener and working in collaboration with our clients to accomplish their research goals and objectives. Through the design and implementation of innovative research solutions, coupled with exceptional creative problem solving abilities, we are the link to the voice of the customer and the market. We specialize in health care and wellness, customer satisfaction

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With a background as a sociologist, Kalinda Fisher founded Advocate Market Research Bureau in 1998 and set out to help businesses gain a truer picture of their target market by becoming the voice of their consumer and their 'advo-cate.' Advocate works with some of the most respected companies in the country in a variety of industries: health care, technology, banking, insurance and entrepreneurial.

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At C+R Research, a full-service marketing insights agency, we've been helping brands grow for over 50 years by delivering great research, deep perspective and committed client service. We're known for best-in-class methodologies, high-quality analytical insights and delivering senior-level attention throughout every phase of our clients' projects. We offer an array of customizable techniques for both qualitative and quantitative research and have focused areas of knowledge and expertise in youth and family, Latinos and shopper insights. Our goal is to equip our clients with the insights they need to confidently develop successful brand strategies and grow their business.



Campbell-Communications, Inc.

New York, NY USA Ph. 718-671-6989 Ron@Campbell-Communications.com www.campbell-communications.com

Ron Campbell 2000+ sessions since 1989

Our mission is to professionally deliver research insights and strategies to guide decisions and choices. Our services include moderating, ethnography, storytelling, on-premise/ environmental interviews, plus IDIs and executive inter-views. Our services also include strategy development and evaluating: new products, concepts and messaging. We identify new opportunities and provide actionable recommendations that distinguish Campbell-Communications.

Camille Carlin Qualitative Research, LLC

Sleepy Hollow, NY USA Ph. 914-332-8647 c.carlin@att.net www.carlinresearch.com

Camille Carlin 5000+ sessions since 1987

Highly-experienced moderator who has conducted thousands of focus groups and in-depth interviews. Extremely skilled at uncovering insights that will impact your business. Extensive qualitative experience with physicians, dentists, children, teens and consumers for projects in the pharmaceutical, health care, personal care products, medical devices, food and beverage industries.



CBA Research Corp.

Scarsdale, NY USA Ph. 914-478-9355 carol_bernstein@cba-link.com www.cba-link.com

Judy Bernstein 500+ sessions since 1997 Carol Bernstein 1000+ sessions since 1980 Jennifer Destin 500+ sessions since 1998

CBA taps the tools of deliberate creativity systems (like design thinking, CPS, LEGO serious play and applied improv) to expand insights and create value. Whether harnessed in qualitative contexts such as focus groups, IDIs and ethnographies or creative problem-solving sessions with consumers or stakeholders, these systems reveal and develop new perspectives and solutions and fuel innovation.



Clarion Research Inc.

New York, NY USA Ph. 212-664-1100 info@clarionresearch.com www.clarionresearch.com

Steve Crane 1000+ sessions since 1990 Jamie Stenziano 1000+ sessions since 2006

Clarion offers a complete portfolio of innovative and trusted qualitative solutions. Our qual team is a group of highly skilled strategic thinkers equipped with the analytical and communication skills essential to understanding and interpreting key insights. Clarion's qual toolbox includes in-person, phone and virtual focus groups, triads/dyads, in-depth interviews, online communities, online bulletin boards, ethnographies and Street Sessions intercepts. When complex research designs call for both qualitative and quantitative, Clarion is uniquely qualified to apply its experience in both methodologies. For more on Clarion, visit our website and follow us on Twitter.

Clear Seas Research

Troy, MI USA Ph. 248-786-1683 connect@clearseasresearch.com www.clearseasresearch.com/

Beth Surowiec 170 sessions since 1999

(See advertisement pp. 11, 61)

Complete Research Connection Columbus, OH USA

Ph. 614-220-4120 info@crcmr.com www.crcmr.com

Chelle Precht 1000+ sessions since 1985

With over 30 years of marketing research experience, CRC brings fun and energy to each and every project! We specialize in getting respondents to share their thoughts (especially on difficult topics). Whether business or consumer, no topic is too difficult. We offer detail-oriented moderating, consulting, auditing, project management and more.



ConneXion Research

Houston, TX USA Ph. 281-815-4940 info@connexionresearch.com www.connexionresearch.com

Maricel Dominguez-Watson 1000+ sessions since 2007 Anthony Dominguez 500+ sessions since 2010 Dwayne Watson 500+ sessions since 2010

Meet our moderators: Maricel, a Hispanic bilingual moderator who has moderated consumer research projects in packaged goods, nonprofit, health care, financial services, energy, etc. Anthony, a young Hispanic bilingual moderator with experience in market research, retail and customer service, is perfect for moderating Millennials and teens. Dwayne, an African-American moderator with knowledge and experience ranging from retail to transportation, health institutions. He has over 25 years of experience in tech-nology and translates these skills to apply new research methods through use of technology.

Consumer Focus LLC

Dallas, TX USA Ph. 214-542-8787 sstewart@consumerfocusco.com www.consumerfocusco.com

Sue Stewart 500+ sessions since 2001

Custom qualitative and quantitative research. Over 15 years of experience. Focus groups, in-depth interviews, brainstorming, ideation sessions. Specialties: customer relationships, direct marketing, financial services and insurance.

Consumer Opinion Services, Inc.

Seattle, WA USA Ph. 206-241-6050 in fo @Consumer Opinion Services.com

www.consumeropinionservices.com

Greg Carter 4000+ sessions since 1995 (See advertisement p. 46)



Consumer Truth® Ltd

Hinsdale, IL USA Ph. 630-325-4660 or 630-325-6902 isabelle@consumertruth.com www.consumertruth.com

Isabelle Albanese 5000+ sessions since 1997 Ken Quaas 2000+ sessions since 2002

Consumer Truth is a marketing consulting company focusing on consumer insight. Our unique brand of Truth Discovery®, honed over 17 years, has built successful marketing and communication platforms for "star" brands in diverse categories spanning three continents. We're sought for our

ability to elicit, recognize and recommend brand strategy based on a brand's pivotal asset - its consumer's truth. We're retained repeatedly for our smart solutions and honest, cutto-the-chase style. Our Video Truth! Revue, a video summary of consumer insight, is a unique, dynamic way to tell the brand's story of insight.



Creative Consumer Research

Stafford, TX USA Ph. 281-240-9646 or 281-804-8171 ppratt@ccrsurveys.com www.ccrsurveys.co

Joyce Walter 700+ sessions since 1980

The main office located in Houston offers complete field services and conducts studies nationwide. Large conferencestyle focus group rooms with one-way mirrors and large client viewing rooms. Conducting market research for 40 years, we offer taste tests, telephone interviewing, executive surveys, mall intercepts, door-to-door interviewing, mystery shops, store audits and bilingual interviewing. Computer capabilities, moderators and translators are available. CCR also offers project management for multiple-city projects. Hispanic and Asian moderators available upon request.



Dan Jones & Associates

Salt Lake City, UT USA Ph. 801-456-6700 info@cicerogroup.com www.diasurvev.com/

Patricia Jones 2600 sessions since 1980 Randy Shumway 1200 sessions since 1996

Dan Jones & Associates, a Cicero Group company, is a full-service market research and public opinion firm located in the heart of Salt Lake City. Our 30-plus-year leadership has made us the premier brand for market research in Utah. Our focus group facilities offer state-of-the-art technology. Our professional staff includes moderators that are PRC-, ORI-, RIVA- and QRCA-certified. We also offer unrivaled recruiting and call center services.

Daniel Research Group



Daniel Research Group

Belmont, MA USA Ph. 617-484-6225 Steve@DanielRG.com www.danielresearchgroup.com

Steve Daniel 1000 sessions since 1984

Helping clients understand the future. We are a full-service market research firm designing and executing studies among users and buyers of information technology products and services worldwide. Focus group studies employ our focus/IT methodology based on 25 years of experience in designing and conducting technology focus groups in technical, commercial and consumer segments. Our modelenabled consulting services apply sophisticated quantitative forecasting methodologies to aid in making strategic and tactical business and marketing decisions.



Decision Analyst, Inc.

Arlington, TX USA Ph. 817-640-6166 or 800-262-5974 jthomas@decisionanalyst.com www.decisionanalyst.com

Jerry W. Thomas 5000 sessions since 1969 Clay Delthoff 2500 sessions since 1990 Bruce Crandall 500 sessions since 2005

From in-person focus groups and depth interviews to ethnography and laddering techniques, Decision Analyst delivers highly analytical and decision-oriented insights. Decision Analyst offers both in-person and online qualitative research services. In-person services include: focus groups, sensitized groups, dyadic and triadic interviews and depth motivational studies. Decision Analyst is a world leader in online qualitative research: time-extended online focus groups, time-extended depth interviews, online ethnography and online pseudo-depth interviews.



DLG Research & Marketing Solutions

Houston, TX USA

Ph. 713-795-5503 or 281-589-8360 info@dlgresearch.com www.dlgresearch.com

Edgardo de la Garza 1000+ sessions since 1997 Elvia de la Garza-Morales 1000+ sessions since 2000

Bilingual and bicultural moderators whose professional backgrounds encompass experience from all sides of the business: agency, client and supplier. This grants a richer understanding of the client's position - strengthening the approach to each project, identifying and tending opportunities and intuiting and delivering against clients' stated and unstated needs.



Doyle Research Associates, Inc.

Chicago, IL USA Ph. 312-863-7600 info@doyleresearch.com www.doyleresearch.com

Christine Efken 500+ sessions since 1995 Carole Schmidt 750+ sessions since 1990 Alice Morgan 500+ sessions since 1996

Qualitative research specialists: innovative, strategic and experienced. We work throughout the product lifecycle, with particular expertise in concept development, communications/messaging, segment deep dives and the consumer journey. We have a toolbox of proven methods that allow for custom and mixed-method approaches, including in-person, online, mobile, ethnographic and social media. Specialty products include Geo-Stories^{5M} (real-time geo-validated phone interviews). IHUTnographies^{5M} (qualitative IHUTs), QuickQual^{5M} (48-72 hours) and MineSights^{5M} (qualitative meta analysis).



Engel Research Partners

San Bruno, CA USA Ph. 415-867-3014 marc@engelrp.com www.engelrp.com

Marc Engel 1500+ sessions since 2002

Marc Engel has led over 1,500 focus groups, interviews and ideations over the past 14 years, drawing on his diverse background that includes not only marketing research, but also law (member of the California Bar), marketing, writing and product naming. Perhaps most valuable and unique to his work as a moderator is his comedy experience: stand-up, improv, sketch and emceeing. Adept at making people of all ages and backgrounds comfortable sharing their feelings and opinions, Marc makes the sessions he runs more engaging for participants and more enlightening for his clients.



EurekaFacts, LLC

Rockville, MD USA Ph. 240-403-4800 or 301-610-0590 info@eurekafacts.com www.eurekafacts.com

Maritza Matheus 1000+ sessions since 1999 Jorge Restrepo 200+ sessions since 1994 Alison Wurzel 75+ sessions since 2006

EurekaFacts is a full service research firm. We have experienced, professionally trained, English and Spanish bilingual moderators and on-site recruitment and focus group facilities easily accessible by subway and bus. Expertise includes focus group moderation, cognitive and in-depth interviewing, usability testing. Audiences served: physicians and health professionals; Latinos, Hispanics; consumers; B2B; government; employees; hard to reach populations; educators and school administrators; multicultural audiences; children, teens, parents and seniors. Areas and fields served: concept and ad testing, consumer, social marketing, nonprofit, customer satisfaction, transportation, impact assessments, telecommunications, healthcare and pharmaceuticals, Health IT. For a tour of our facility, click the YouTube icon above.



First Insights

New York, NY USA Ph. 212-926-3700 info@firstinsights.com www.firstinsights.com

Domenica deFazio 500+ sessions since 1999 Julie Rabin 500+ sessions since 1999 Cole McBride 500+ sessions since 1999

First Insights specializes in usability testing, focus groups, ethnographic studies and contextual interviews. We've conducted research projects on Web sites, mobile apps and dozens of new product concepts via in-person and remote interview methods. Our team has deep experience across a variety of industries and can offer complete project management solutions. From facility selection, screener development, creation of a moderator's guide, expert moderation and report development, we deliver actionable recommendations. Visit our Web site for moderator bios and details on our services.



First Insights Chicago, IL USA Ph. 312-455-0088 info@firstinsights.com www.firstinsights.com

Lon Taylor 500+ sessions since 1999 Julie Rabin 500+ sessions since 1999 Cole McBride 500+ sessions since 1999

First Insights specializes in usability testing, focus groups, ethnographic studies and contextual interviews. We've conducted research projects on Web sites, mobile apps and dozens of new product concepts via in-person and remote interview methods. Our team has deep experience across a variety of industries and can offer complete project management solutions. From facility selection, screener

development, creation of a moderator's guide, expert moderation and report development, we deliver actionable recommendations. Visit our Web site for moderator bios and details on our services.

FOCUS LATINO

QUALITATIVE CONSUMER RESEARCH

Focus Latino

Austin, TX USA Ph. 512-306-7393

gcafocuslatino@austin.rr.com

www.focuslatino.com

Guy C. Antonioli 3400 sessions since 1996 Beatriz Noriega 4200 sessions since 1983

Established in 1996. Specializing in Hispanic qualitative and quantitative consumer research and ethnography. Bilingual and bicultural, we moderate in Spanish or English. Beatriz is a psychologist. Guy is a seasoned marketing, advertising and research professional. Both have extensive experience working in the U.S., Caribbean, Mexico, Central and South America as well as Spain. Our combined areas of expertise and option of female or male moderator enable us to better uncover consumer insights and provide value-added recommendations. We also offer clients the benefit of consistency in analysis as well as both cost and time efficiencies when conducting projects among multicultural target audiences.

John Fox Marketing Consulting

Cincinnati, OH USA Ph. 513-658-3699 John@JohnFoxMktg.com www.johnfoxmktg.com

John Fox 300 sessions since 1984

Former Procter & Gamble brand manager, ad agency and research firm principal. Now doing research-based consulting, study design and analysis, focus group moderating, brainstorming facilitation, one-on-one executive interviewing, report writing and coordination of full-service projects. Specializing in consultative analysis, including marketing insights, implications and indicated actions.



Frieden Qualitative Services

Sherman Oaks, CA USA Ph. 818-789-6894 garytheg@aol.com www.garyfrieden.com

Gary Frieden, Ph.D. 15000+ sessions since 1984

Experience insightful focus groups (in-person as well as online Webcam) from a style I've developed over 20 years! With a Ph.D. in psychology, I uncover underlying motivational reactions and "get the 'real' stuff." Respondents and clients enjoy my high-energy sessions, creating involvement. Specialties: packaged goods, advertising, new concept development, positioning. Seniors are a strong specialty! Medical, general consumers, Web sites, banking, wireless, automotive, beverages, fast food, customer service and more. I've been the invited speaker at many qualitative conferences. QRCA and MRA member and certified PRC, presenting my unique approach to focus group moderating. Benefit from our collaboration! Contact Gary Frieden.



Fueled Insights, LLC

Havertown, PA USA Ph. 610-731-1456 or 908-507-1315 victoria@fueledinsights.com

www.fueledinsights.com Victoria Waldman 500+ sessions since 2000 Theresa Lewis 500+ sessions since 2001

A full-service market research firm, Fueled Insights provides qualitative, quantitative and storytelling services to provide actionable insights that attract new customers, deepen existing customer loyalty and identify new revenue streams. Senior-level executives with diverse industry experience work on every aspect of your customized plan. Fueled Insights can prove your research ROI and reinforce your SME status by synthesizing existing transactional data, syndicated reports and proprietary research findings into a holistic story that you can socialize within your organization

CKSConsulting

utions through insight

GKS Consulting LLC Evanston, IL USA Ph. 847-571-3445 gail@gksconsulting.net www.gksconsulting.com

Gail Straus 2100 sessions since 1995

GKS Consulting offers specialized market research serving nonprofit institutions and other service-providing organizations. With more than 30 years of institution- and agency-based experience, we work closely with clients to understand objectives, challenges and opportunities and then listen carefully to find the insight and perspective that takes strategy to the next level. As one client says: "Gail brings a keen, rational research process paired with extensive marketing experience. Her moderation skills are exceptional whether group or one-on-one."

GOGO Insights and Results

Chicago, IL USA Ph. 347-948-7104 elan.gogoinsights@gmail.com

Elan Ticar 100+ sessions since 2001

Moderating is as much an art as a science. It takes experience and careful planning. Using a professional saves time and money and gets you the insights and results you need



Great Questions, LLC

St. Louis, MO USA Ph. 636-399-7746 Krista@GreatQuestionsCompany.com www.GreatQuestionsCompany.com

Krista Knuffman 750 sessions since 1995

Great research begins with Great Questions! We help you discover the answers you need to move forward with confidence. Everything we do involves discovery through people - what they think, how they feel, what they want, what they do and their ideas. We manage your entire project, from exploring your research needs to reporting the results and helping you use those results to grow your business.

GTR Consulting

Mill Valley, CA USA Ph. 415 713-7852 gary@gtrconsulting.com www.gtrconsulting.com

Gary Rudman 1000+ sessions since 1991

For over 20 years, Gary Rudman of GTR Consulting has specialized in custom qualitative market research among kids, teens, gatekeeper parents and young adults (ages 21-35). We also offer our gTrend macro-trend syndicated studies on teens and young adults.

Hardwick Research

Mercer Island, WA USA Ph. 206-232-9400 nancy@hardwickresearch.com www.hardwickresearch.com

Nancy Hardwick 1000+ sessions since 1990

Nancy is an experienced moderator, skilled listener and effective communicator. She incorporates both qualitative and quantitative techniques to uncover growing consumer trends, define target markets and provide insight into marketing challenges.



The Henne Group

San Francisco, CA USA Ph. 415-348-1700 jhenne@thehennegroup.com www.thehennegroup.com

Jeff Henne 1000+ sessions since 1985

The Henne Group (THG) is a consulting group specializing in a full range of marketing research, strategic planning, and communications services. THG offers exceptional competencies in quantitative and qualitative research, as well as strategy development, social marketing, and management of issues, relationships, and reputations. THG excels in study and survey instrument design, data collection and analysis, and has completed hundreds of

quantitative and qualitative research projects in areas including finance, public health, healthcare, transportation, and environmental. In 2005, THG established Waller Hall Research (WHR) in Greybull, WY to augment its data collection capacity. THG's data collection centers are run from the same server so that all activities can be centrally

Hispanic Focus Unlimited

Pharr, TX USA Ph. 956-501-4211 or 956-783-9907 hispanicfocus@aol.com www.hispanicfocusunlimited.com

Ruben Cuéllar 2500+ sessions since 1995

As the owner of a focus group facility I have conducted thousands of focus groups and IDIs over my 28 years of experience in market research. I am a bilingual/ bicultural moderator with experience in a wide range of categories and markets, specializing in Hispanic consumers of all ages in the U.S.

Hispanic Marketing Insights, LLC Liberty Township, OH USA Ph. 513-777-0289 rhernandez@hispanicminsights.com www.hispanicminsights.com

Rafael Hernandez 2000+ sessions since 1996

Rafael brings 20+ years of corporate and marketing experience to his practice. Trained at the Burke Institute, experience includes: IDIs, triads, in-home studies, focus groups, shop-a-longs, B2B. Rafael's knowledge of the Hispanic consumer, fully bilingual status, and his being in tune with the culture allow him to understand clients' needs and maximize the effectiveness and value of research



Hispanic Research Inc.

Melbourne, FL USA Ph. 888-722-6773 or 732-613-0060 info@hispanicresearch.com www.hispanicresearch.com

Ricardo A. Lopez 2000+ sessions since 1986 Otto J. Rodriguez 1500+ sessions since 1999

Hispanic Research Inc. is a marketing consulting firm that specializes in the U.S. Hispanic market. It provides consulting services to businesses that intend to market their products and/or services to the U.S. Latino community. The company specializes in providing actionable research information and marketing guidance. We have offices in New York, Florida and California and serve all U.S. Hispanio markets (including Puerto Rico).



Horowitz Research New Rochelle, NY USA Ph. 914-834-5999

info@horowitzresearch.com www.horowitzresearch.com

Howard Horowitz 1500 sessions since 1983 Adriana Waterston 1000 sessions since 2001 Nuria Riera 100 sessions since 1999 Mariela Cufre 400 sessions since 2009 Matt Zuckerman 100 sessions since 2010 Nicole Ogando 100 sessions since 2013 Mariana Diaz-Wionczek 500 sessions since 2004

For 30 years Horowitz has delivered full-service and a la carte research domestically and internationally. Our approach to research design/analysis ensures you get not only answers to questions but findings contextualized to inform strategic business decisions. Our moderators develop great rapport with subjects on a range of topics: TV programming, sports, advertising, new technology, travel and social/political issues. Qualitative B2B and B2C services include focus groups/online focus groups, one-on-one/dyads/triads, ethnography, videography and online community research. We're known for our expertise among Latino, multicultural and international consumers. Our bilingual (English/Spanish) moderators include Adriana Waterston, Mariana Diaz-Wionczek, Mariela Cufre, Nuria Riera and Nicole Ogando.

IKM GmbH

Insight Innovation Consulting Kirchheim/Munich, Germany Ph. 49-89-9046-8300 or 49-17-0868-8240 ilka.kuhagen@ikmarketing.de www.ikmarketing.de

Ilka Kuhagen 1000+ sessions since 1993

Independent researcher and consultant based in Munich. Multilingual. Experienced with B2B, medical, pharma, consumers, specialized in international research. Broad toolbox: ethnography, projectives, laddering, usability, online, mobile, small and large groups, communities, combining methodologies to best address different target groups. Ideation facilitation based on CPSI process.



Issues and Answers Network, Inc.

Global Marketing Research Virginia Beach, VA USA Ph. 757-456-1100 or 800-23-ISSUE clindemann@issans.com www.issans.com

Shelly Clark Carla Lindemann Peter McGuinness Michael Griffin

Issues and Answers Network Inc. is a global marketing research firm providing cutting-edge quantitative, qualitative and hybrid methodologies - everything from survey and sampling design, in-house data collection and project management to data analysis, if needed. Four professionally-certified moderators will manage all aspects of qualitative projects - a sampling of experience includes focus groups, one-on-one interviews, dyads, triads and mini-groups - all conducted in multiple industries including alcoholic beverages, apparel, consumer durables, food, pharmaceuticals and telecommunications, just to name a few. (See advertisement p. 35)



James Industry Research Group

Portland, OR USA Ph. 866-220-2644 Info@JIRGroup.com www.jirgroup.com

Jim James 1000+ sessions since 1997 Jocelyn W. Thomas 1000+ sessions since 2013 Bethel Brown since 2016

James Industry Research Group started with one goal: to do the best, most integrity-driven research for our clients. Our principles and moderators come from a variety of backgrounds and together our research Group can fulfill any marketing research need. Our Burke and RIVA-trained moderators are experienced in research design, moderating, analysis and reporting, serving marketing & product development in industries including: Conventions/Tradeshows, Hotel/Resort, Casino and Gaming, Usability, Human Factors, Public Utilities and more. We're looking forward to being your research partner.

Just Qual+

Bradenton, FL USA Ph. 941-882-0204 eric@justqual.com www.justqual.com

Eric Swatek 19000 sessions since 1998

Just Qual+ LLC is a boutique qualitative and quantitative health care marketing research firm with extensive live, global and online capabilities. Eric Swatek is a PRC-certified Expert Consultant who has been serving both pharmaceutical and medical device clients since 1998. We have conversations with professionals, patients, consumers and caregivers in the U.S. and around the world.



Just The Facts, Inc. Arlington Heights, IL USA Ph. 847-506-0033 info@jtfacts.com www.itfacts.com

Bruce Tincknell since 1984

Just The Facts Research Inc., strategic marketing qualitative experts, over 30 years, highly experienced in a range of industries, topics and subject matters: B2C, B2B, services and more. Choose traditional, in-person qual or cutting-edge online/Web groups and interviews. JTF handles all setup, recruiting, moderating, even Webcams! Our unique Qual-Quant™ methods yield insights through specialized unaided techniques. Innovative Web methods access our Virtual Pod Room for groups/IDIs using cloud technologies. Clients no longer need to travel but can watch and listen from anywhere with their own PC. JTF also recruits respondents across the U.S. or globally. Clients value our ability to bring out the best in group dynamics, uncovering business insights and opportunities with significant growth/ROI.



Karchner Marketing Research, LLC KMR Research Studio Collegeville, PA USA Ph. 610-489-0559 or 610-564-9624 helen@kmrinsights.com www.kmrinsights.com

Mike Karchner 2500+ sessions since 1989 Helene Karchner 2500+ sessions since 1988

As a strategic business partner, Karchner Marketing Research, LLC satisfies unmet business needs through qualitative and quantitative opinion, consumer and market research via in-person, telephone, virtual or hybrid to meet objectives. We offer primary market research conducted across 78 industries and specialize in pharmaceutical, medical devices and insurance, across over 110 therapeutic areas. We uniquely provide small boutique personal service while offering large global style strategic support through effective, honed, engaged listening. Helen Karchner is a RIV-trained moderator who personally collaborates with clients to custom design research. Michael Karchner is a Master RIVA moderator, only 1 of 30 in the US, who provides implementation of specific techniques and methodologies.

CKOIMEPMALNEY

The Kiemle Company Greer, SC USA Ph. 864-640-1701 fkiemle@charter.net

Fred W. Kiemle 200+ sessions since 1980

Broad marketing research experience helps us choose the best approach for all qualitative and quantitative assignments. Our clients tell us we are skilled at asking the right questions and guiding them in what to do with the information. Ask us for a proposal. Clients choose us 85 percent of the time after reviewing our proposals.

Landmark Performance Group Minneapolis, MN USA

Ph. 612-724-8687 jan@landmarkperformancegroup.com www.landmarkperformancegroup.com

Jan Johnson 600 sessions since 1994

Create exciting new products that fly out of showrooms and display lots. Make sure that your products and services target the killer attributes that customers pay more for. We converse, we question, we probe, we understand, we harvest insights to grow your business. When your market is smart people who work outside, we are the qualitative experts. Agriculture, construction, forestry, golf, turf.



LGBT and Life Stage Research Insights

Chicago, IL USA Ph. 703-401-7743 Curt@lgbtresearchinsights.com www.lgbtresearchinsights.com

Curtis Fedder 200+ sessions since 1985

Curt Fedder leads LGBT and Life Stage Research Insights. He specializes in qualitative research and market research consulting with LGBT consumers, Millennials, Baby Boomers and seniors. With over 25 years of expertise on CPG, retail and B2B brands, Curt brings a strategic focus to studies, believing that effective qualitative research is based on both skilled interviewing and expert analysis. Working in collaboration with a licensed clinical social worker, Curt combines leading-edge research techniques with psychosocial principles to provide compelling insights that build brand value.

(See advertisement p. 53)



Listen Research, Inc. Trabuco Canyon, CA USA Ph. 949-216-9161 kim@listenresearch.com www.listenresearch.com

Kimberlie Harmon 1000+ sessions since 1997 Brandee Hawkins 600+

Listen Research is an experienced team of professionals that grew up in corporations and large research firms. We provide qual and quant research services to a diverse portfolio of clients of all sizes. Our moderators have experience leading discussions with people from all walks of life, from business-to-business interviews with doctors and executives to friendship-pair groups with kids, teens/tweens and young adults. We provide outstanding analysis with results-oriented implications, enabling clients to hear what people think and make smarter marketing, advertising and product development decisions.

Lohs Research Group

Inverness, IL USA Ph. 847-359-0606 jan@lohsresearch.com www.lohsresearch.com

Jan Lohs since 1987

Jan Lohs is known for qualitative research that brings depth of insight and understanding of consumers, B2B and employees. She is skilled at drawing out the personal stories that bring to light the unconscious drivers of attitudes and behavior. Insatiably curious and committed to excellence on every project, whether domestic or international, Jan is passionate about qualitative research!

M G Z Research

Rolling Meadows, IL USA Ph. 847-397-1513 mgzipper@gmail.com

Martha Garma Zipper 2300+ sessions since 1983

Premier bilingual Latina moderator with over 20 years of experience: moderating. IDIs and ethnography. Works in U.S., Puerto Rico and Mexico. Knows Latino population and degrees of acculturation. Expertise: ad testing, health care, retail, food products, consumer goods.



Market Probe International, Inc.

New York, NY USA Ph. 212-725-7676 alan@marketprobeint.com www.marketprobeint.com

Alan Appelbaum 100+ sessions since 1990

Market Probe International has a dedicated team of moderators and qual managers. We offer traditional qual research as well as hybrid and virtual/online focus groups, IDIs and bulletin boards in the U.S. and worldwide. Excellent quality, timely performance and expertise derived from over 40 years of business operation. 20-plus-country international network with English-speaking moderators.



Market Research Answers, Inc.

Irving, TX USA

Ph. 972-756-1858 or 855-619-7300 (Toll Free) harold.gross@marketresearchanswers.com www.marketresearchanswers.com

Harold Gross 1000+ sessions since 1997 William Mitchell 1000+ sessions since 1992

Market Research Answers is a full-service market research consultancy providing qualitative, survey and statistical analysis services to B2B and B2C clients across many industries and product categories. MRA moderators are seasoned professionals who have conducted hundreds of focus groups and in-depth interviews with a wide range of business and consumer respondent profiles for small, medium and Fortune 500 companies. We have deep experience interviewing health care professionals/specialists and C-suite senior executives in the aerospace, food service, health care and hospitality industries. Our clients value our in-depth reporting and ability to mine insights which can be transformed into action items to improve the bottom line.



The Martec Group - Chicago

Chicago, IL USA Ph. 888-811-5755 chuck.bean@martecgroup.com

www.martecgroup.com
Jim Durkin 1251 sessions since 1984

The Martec Group, with offices in Chicago, Detroit, Green Bay, Wis., Frankfurt, Germany, Beijing and Shanghai, is a partnership of business-to-business and consumer market research professionals offering a full toolbox of qualitative and quantitative methodologies that have been developed to best meet our clients' needs. With a commitment to client relationships, Martec serves market segments that include, but are not limited to: automotive, chemical, children, medical/health care, building industries, utilities/energy, sensory/foods, financial/investment/banks and executives/management.



The Martec Group - Detroit

Southfield, MI USA Ph. 888-811-5755 chuck.bean@martecgroup.com www.martecgroup.com

Chuck Bean 1250 sessions since 1984 Ken Donaven 1000 sessions since 2000

The Martec Group, with offices in Chicago, Detroit, Green Bay, Wis., Frankfurt, Germany, Beijing and Shanghai, is a partnership of business-to-business and consumer market research professionals offering a full toolbox of qualitative and quantitative methodologies that have been developed to best meet our clients' needs. With a commitment to client relationships, Martec serves market segments that include, but are not limited to: automotive, chemical, children, medical/health care, building industries, utilities/energy, sensory/foods, financial/investment/banks and executives/management.



The Martec Group - Green Bay Green Bay, WI USA

Ph. 888-811-5755 or 920-494-1812 linda.segersin@martecgroup.com www.martecgroup.com

Chuck Bean 1250 sessions since 1987 Linda Segersin 250+ sessions since 2003

For over 30 years, The Martec Group has provided business-to-business and business-to-consumer research solutions supported by a range of qualitative and quantitative intelligence offerings to suit your strategic needs. Martec offices are located in Chicago, Detroit, Green Bay, Wis., Frankfurt, Germany, and Shanghai. Martec-Green Bay is a full-service marketing research office featuring a focus group suite, a 25-CATI station phone center and a data processing-analytical department. This office is located just 1.5 miles from the airport and has hosted a multitude of groups including political, health care, energy, food and consumer products.

Maryland Marketing Source, Inc. Owings Mills, MD USA

Ph. 410-922-6600 cspara@mdmarketingsource.com www.mdmarketingsource.com

Michelle Finzel 500+ sessions since 2004

Michelle Finzel is a RIVA-trained focus group moderator. She is experienced with qualitative and quantitative research methods, analysis, reporting and presentation, including focus groups, telephone interviews, intercepts, online and in-depth interviews.

MENESES RESEARCH &



Meneses Research & Associates

San Diego, CA USA Ph. 619-200-7124 info@menesesresearch.com www.menesesresearch.com

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Since 1995, as a bi-cultural marketing research firm, we are dedicated to developing a long-term partnership with each of our clients. We go above and beyond to make sure that we constantly exceed our clients' expectations and provide a true partnership experience. Our wide range of expertise allows us to design every study to fit each client's unique needs and style. We offer a menu of services from full-service to only moderation. Our capabilities go beyond the Hispanic/Latino consumer living in the United States, it goes to every Spanish-speaking country in the world.



Morpace Inc.

Market Research and Consulting Farmington Hills, MI USA Ph. 248-737-5300 or 800-878-7223 information@morpace.com

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People love numbers and so do we! But in market research, a number without context doesn't tell the whole story. That's where the value of qualitative comes in. Qualitative research captures the story behind the numbers by listening to consumers talk about your brand. These conversations take place in-person or online; individually or in a group. We identify the personal experiences that drive the perceptions of your target market and we turn those insights into actionable solutions. Then you confidently know what moves to make next. Please contact us to find the right method and the right moderator for your next project.

Nichols Research - Fremont

Fremont, CA USA Ph. 510-794-2990 info@nicholsresearch.com www.nicholsresearch.com

Amy Shields, PRC 1000+ sessions since 2004

Nichols Research is a full-service marketing research firm specializing in major and emerging industry methodologies, consulting/moderating, national/international field management and data collection, with four research facilities in Northern and Central California. Our in-house moderators conduct research locally, domestically and abroad. To learn more, please visit our San Francisco listing or Web site.

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Nichols Research is a full-service marketing research firm specializing in major and emerging industry methodologies, consulting/moderating, national/international field management and data collection, with four research facilities in Northern and Central California. Internally and externally, we are committed to providing innovative products, ethical services and an environment of creativity in marketing research, ultimately demonstrating the value of the insights and strategies industry. Our in-house moderators are owners of the company and conduct research locally, domestically and abroad.

Nichols Research - San Jose/Silicon Valley

Sunnyvale, CA USA Ph 408-773-8200 info@nicholsresearch.com www.nicholsresearch.com

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O'Donnell Consulting

William J. O'Donnell, Psy.D. Havertown, PA USA Ph. 610-410-8979 wodonnell37@comcast.net

William J. O'Donnell Psy.D. 2000+ sessions since 2000

Bill spent seven years as a cell biologist and team facilitator/trainer at SmithKline Beecham and four years at pharmaceutical market research firms Curtis Analytic Partners and V2 GfK before establishing O'Donnell Consulting in 2004. He has extensive domestic and international medical market research experience with professionals and consumers across a broad variety of therapeutic areas. He has conducted professional seminars/workshops in the U.S., Brazil and the U.K. and is a licensed psychologist.

Outsmart Marketing

Minneapolis, MN USA Ph. 952-924-0053 ptuch@outsmartmarketing.com www.outsmartmarketing.com

Paul Tuchman 2000+ sessions since 1990

We specialize in face-to-face research, establishing a rapport that gets us past the easy answers to real learning. We've worked in a broad range of categories and industries, so you get the experience and perspective that brings a fresh approach to every project while tapping into years of expertise. With every project, you get a career's worth of learning about what makes people tick.



PLANET LATINO

Planet Latino Market Intelligence, Inc.

North Miami, FL USA Ph. 305-724-3826 latinoplanet@aol.com www.marketplanetlatino.com

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At Planet Latino Market Intelligence, all we do is qualitative research - listening and learning from consumers face-toface while surpassing cultural barriers. We have years of experience conducting focus groups, one-on-one interviews and ethnographic studies with consumers of all ages and various ethnic backgrounds. We are bilingual and bicultural moderators with experience in all categories, industries and markets, specializing in the Hispanic experience in the U.S. and Latin America, as well as the general market. At Planet Latino Market Intelligence Inc. we offer strategic consulting, delivering actionable results from multicultural insights.

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QualCore.com Inc.

Minneapolis, MN USA Ph. 612-377-3439 jeff.walkowski@gualcore.com www.qualcore.com

Jeff Walkowski 1500+ sessions since 1989

Seasoned research consultant. Enjoys all qualitative research methods: in-person, phone and online - IDIs and groups. Offers creative yet practical research designs and flexible reporting options. Pioneer and recognized expert in the use of online qualitative methods. Trains traditional moderators to adapt their skills to the online environment (www. onlinemoderator.com). Member QRCA, MRA and AMA. PRC certification from the MRA.



Quanttitudes

Research-Based Consulting Miami, FL USA Ph. 305-908-1618 or 954-651-3125 Jesus.rios@quanttitudes.com

Jesus Rios 1000+ sessions since 1992

My expertise combines strong moderation skills with a solid business acumen. I have a keen eye for uncovering latent consumer needs and testing hypotheses on the fly. My experience spans many industry sectors as well as public affairs/social research. Highly proficient in Spanish and English. Familiar with all Latino accents, idioms, origins, and acculturation levels. Flexible and fun to work with. Can assist in all project components from moderation-only, to moderator's guide design, to analysis/ reporting, to Research-Based Consulting. Flexible to travel all over the U.S. and Latin

REALeResearch

REALeResearch

Oakland, CA USA Ph. 510-832-6484 susan@realeresearch.com www.realeresearch.com

Susan Reale 2000+ sessions since 1985

REALeResearch is a boutique qualitative research consultancy with expertise in gathering, understanding and articulating consumer experiences. Our No. 1 goal is to provide businesses - from start-ups to Fortune 500 - with unbiased, on-target, insightful and valuable voice-ofthe-customer feedback. With over 25 years of research experience, REALeResearch offers cost-effective, yet highquality research services.

Research Explorers™, Inc.

Wilmette, IL USA Ph. 847-853-0237 or 847-275-9502 (mobile) lisa@researchexplorers.com www.researchexplorers.com

Lisa McDonald 1200 sessions since 1994

Research Explorers Inc.™, est. 1994, provides actionable solutions through in-person/online focus groups, in-depth interviews and ethnographies. Expertise: African-Americans, financial services, health care, arts and culture and social



Revelations Research Solutions

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Full-service marketing research facility offering quantitative and qualitative research expertise. Harvest is the Midwest's premier research facility for on-site and Web-based focus groups, interviewing and questionnaire development, fielding and analysis. Harvest offers two state-of-the-art focus group suites, with floor-to-ceiling glass, three cameras per room, client lounges, in-depth interviewing facilities, videostreaming and a state-of-the-art test kitchen. Our facility is minutes from downtown Des Moines and the airport with free parking at our front door.



Rincón & Associates, LLC

Dallas, TX USA Ph 214-750-3800 edward@rinconassoc.com www.rinconassoc.com

Dr. Edward T. Rincón 1700 sessions since 1985

Provide focus group moderating, ethnographic and in-depth interviews that target Latino, Asian and African-American consumers. Experience of 37 years includes numerous industries; support in English, Spanish and Mandarin; global and domestic markets. Services include project management, design of discussion guide, recruitment, moderating, transcriptions and excellent written reports.

RIVA Market Research Rockville, MD USA (See advertisement p. 17)

RMS Communications and Research Inc.

North Hollywood, CA USA Ph. 818-503-7721 or 818-321-2862 rhndascott@att.net

Rhonda Scott since 1992

Rhonda Scott has moderated, coordinated and managed general, multi-ethnic and African-American marketing research projects from inception to final presentation, with topics from advertising, communications, product testing, politics, health care and public policy issues.



Roller Marketing Research

Gloucester, VA USA Ph. 804-693-3208 rmr@rollerresearch.com www.rollerresearch.com

Margaret R. Roller 2600+ sessions since 1976

The core of RMR is built on Ms. Roller's 40 years of professional moderating, her graduate training in research design and focused attention to each study. The emphasis is on collaboration leading to meaningful design, skilled execution, in-depth analysis and actionable results. No junior researchers, no ghostwriters. U.S. and international. Roller's design blog: www.researchdesignreview.com.



Shugoll Research Bethesda, MD USA Ph. 301-656-0310 rseale@shugollresearch.com www.ShugollResearch.com

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Shugoll Research is a full-service market research company specializing in custom-designed quantitative and qualitative studies. We have two facilities in the D.C. metro area - Bethesda, Md., and Alexandria, Va. - for a total of eight luxurious room suites and an IDI room. On-site recruiting Convenient to three airports, several major hotels and adjacent to two metro subway stations. Super room available to seat up to 72 respondents theater-style. Ideal for large dial tests and mock juries. CLT sensory labs available. Respondent database includes D.C., Maryland and Virginia. Videostreaming available.



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Sigma Research Management Group is proud to be celebrating over 30 years as marketing research providers and consultants. Our research has influenced marketing decisions of clients on three continents. Sigma is an online pioneer, having entered the field in 1998. Today we offer online qualitative research tools: focus groups, bulletin boards, social media platforms, Webcam interviews, online insight communities. We provide the capabilities of a large research corporation and the flexibility, personalized care and attention you might expect from an independent consultant. We listen between the lines.



SIS International Research, Inc. Worldwide Headquarters

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SIS employs a team of experienced moderators across the U.S. and around the world. Our key cities for fieldwork include New York, Los Angeles, Chicago, Mexico City, London, Berlin, Shanghai, Manila, Singapore, Hong Kong and Seoul. Our chief moderator Ruth Stanat is one of the industry's most experienced moderators. Many of our moderators are multilingual and are available for multi-city research. With multilingual moderators and global and nationwide coverage, SIS provides numerous advantages for your qualitative research needs.

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Kevin Wang

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Smarty Pants® Jonesborough, TN USA Ph. 203-847-5766 info@asksmartypants.com www.asksmartypants.com

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arty Pants, a youth and family research and strategy firm, is dedicated to helping clients understand/connect with kids, tweens, teens and the influential adults in their lives. We provide primary research and strategic consulting to domestic and international giants in the toy, tech, food/bev, video game, apparel, retail, media, restaurant, travel, CPG categories. Our moderators, quantitative researchers and brand strategists conducts research in schools, stores, restaurants, homes and online and publishes annual syndicated reports on youth and families. U.S. offices: NYC, San Diego, Boston, L.A., Nashville, Myrtle Beach.



SofoS Market Research Consulting

Milwaukee, WI USA Ph. 414-258-7601 lisa@sofosmarketresearch.com www.sofosmarketresearch.com

Lisa Hermanson 3000+ sessions since 1993 Kelly Wahl 1000+ sessions since 2005

SofoS is Greek for wise. Research is often thought of as gaining facts. But without an understanding of how they're applicable to your needs, knowing facts is a dead end. With thousands of hours of research experience both in front of and behind the glass, we creatively design qualitative consumer studies focusing on your business objectives, your categories, your consumers and the different stages of your development processes. Our reports focus on relevant implications for your business needs. We separate what's actionable from what's not so you get clear, useful information. We call it... Wisdom.



Montreal, QC Canada Ph. 514-878-9825 vbouchard@som.ca www.som.ca

Maude Lafleur

SOM offers you two focus group rooms completely equipped with services: a hostess before groups start, an observation room welcoming up to 12 people and a neighboring lounge for closed-circuit viewing. Our rooms have flat screens for presentations, an easel with removable sheets, an erasable board, a cork board as well as two bars of suspension and two cymas. We offer audio and video recordings with warehouse on server, access to high-speed Internet, Wi-Fi, snacks for participants/observers. We can offer simultaneous translation, note-taking, management of incentives and FocusVision.



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Berkeley, CA USA Ph. 310-454-6842 springboardmr@gmail.com www.springboardmr.com

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Springboard uniquely combines research smarts with client-side marketing experience. Our hands-on experience in Fortune 500 product management, new product development and marketing strategy/communications enables us to design and conduct research that produces game-changing insights and ideas. Our work spans a wide variety of comnercial and not-for-profit endeavors and our clients include Fortune 500 firms, not-for-profits, new ventures and global research/consulting firms. Specialties include kids/teens/ young adults, B2B, Asian-Americans, not-for-profit, educa-



The StarPoint Consulting Group Chicago, IL USA

Ph. 773-342-5660 jcole@StarPointGroup.com www.StarPointGroup.com

Jerry Cole 4000+ sessions since 1986

Qualitative research is central to our program and we make a point of keeping it interesting and making it actionable. We are specialists in consumer perception and decision-making and their impacts on brand and advertising assessment, concept development, product evaluation, the shopping experience and new product design. We keep it interesting with engaging respondent tasks and original interviewing protocols regardless of format: in-person, online, on-site or in-store. We keep it actionable on the back end by focusing on the key insights and how they should guide your next steps.

Stat One Research

Atlanta, GA USA Ph. 404-350-7200 or 678-755-0630 tom@svvs.com

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Over 20 years of experience on the client-, agency- and supplier-sides of the business. Start-up to Fortune 500 clients in health care, technology, telecom, media, energy, financial services, etc. Focus groups, IDIs, usability testing, intercept studies.

Strategic Focus Research and Consultancy Ltd. Hong Kong, SAR, Hong Kong

Ph. 852-2832-7861 davidhui@strategicfocus.com.hk www.strategicfocus.net

David Hui 900+ sessions since 1992

Established in 1996, we are a full-service market research company that conducts both qualitative and quantitative studies in Greater China and other regions within Asia with multinational clients, leading ad agencies and international market research consultants



Survey Center Focus, LLC

Chicago, IL USA Ph. 312-321-8100 susans@scfllc.com www.scfllc.com

Sue Gartzman

SCF features in-house moderators with extensive experience with consumers, pre-teen/teens, physicians and C-level/other professionals on a range of topics: consumer behavior, product development, usability testing, ad communication, litigation, pharmaceuticals, health care and finance. Methodologies include: focus groups/IDIs, triads, dyads, team shops, ethnography, shopping audits, mystery shops, mock trial, online groups and blogs. SCF has over 35 years in qualitative research and over 15 in global project management, refining a proven network of moderators and facilities around the world.



Talking Business, LLC

Newport Beach, CA USA Ph. 949-721-4160 holly@talkingbusiness.net www.talkingbusiness.net

Holly M. O'Neill 1000+ sessions since 1997

Talking Business delivers the truth behind brands and what motivates purchase behavior - vital insights decision makers need to drive marketing solutions. Offering more than focus group moderating, we specialize in innovative research (online communities, online focus groups, ethnography) and strategic brand development. Our category expertise includes consumer, financial, pharmaceuticals, technology and hospitality with clients such as GlaxoSmithKline, Princess Cruises and Experian. Exceeding client expectations for more than 18 years, Talking Business connects with target audiences to better understand brands - loud and clear.



Targoz Strategic Marketing Nashville, TN USA Ph. 615-410-4553

randy.ellison@targoz.com www.tarqoz.com

Randy Ellison 300+ sessions since 2003

Targoz Strategic Marketing is a full-service market research company specializing in qualitative and quantitative research. Professionally-certified industry experts seasoned in online, in-person and telephone research across a range of industries will help you understand why people make the decisions they do and how you can best influence those decisions. Contact us today and turn our insights into your

Thoroughbred Research Group

Louisville, KY USA Ph. 502-276-5503 info@torinc.net

Mary Lea Quick 500 sessions since 1990

Thoroughbred Research Group has over 35 years of qualitative research experience providing discussion guide design, facilitation and insightful reporting. As a full-service research firm, we also excel in quantitative services which include mail, phone and online methodologies. We provide questionnaire design, in-house programming and hosting of CATI and Web surveys and analytics and reporting. (See advertisement p. 51)

Threads Qualitative Research

Atlanta, GA USA Ph. 404-308-7173 markm@threadsqual.com www.threadsqualitative.com

Mark Michelson 1000+ sessions since 1984

Threads Qualitative Research is a global marketing research firm with an approach based in consumer anthropology. Our data collection methods integrate classic anthropological and qualitative research techniques with the latest technologies such as mobile ethnography and online qual.



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San Gabriel, CA USA Ph. 626-309-0532 ly@361degrees.net www.361degrees.net

Lawrence Yeung 350 sessions since 2002

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Trotta Associates / Trotta-Hansen

Marina del Rey, CA USA Ph. 310-306-6866 marina@trotta.net www.trotta.net

Diane Trotta 8000 sessions since 1985

Ms. Trotta has conducted research for major companies in virtually every industry segment, including consumer goods and services, business-to-business and health care. Packaging research, positioning and usability testing are fortes. Trotta Associates owns and operates two focus group facilities in the Los Angeles and Orange County metro areas.

Turtle Bay Institute, Inc.

Princeton, NJ USA Ph. 609-688-9640 tbi@turtlebayinstitute.com

Kathleen Murphy 5000 sessions since 1985

Qualitative and quantitative research. Focus groups, individual interviews, idea generation for developing new products and concepts, repositioning existing brands, advertising and brand imagery. Creative workshops with consumers to generate new product ideas. Perceptual mapping of attribute importance and satisfaction. Affiliations: AMA, MRA, QRCA.

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Our moderators average 25 years of experience across all ethnic, age and racial groups. Besides focus groups, they are experienced in IDIs and ethnographies. They can assist with creative development, strategic planning and R&D, as well as analysis, report-writing and formal presentations. Their training includes an MBA and the Burke Institute.



Vision Strategy and Insights Sherman Oaks, CA USA

Ph. 818-261-8340 or 410-521-2147 brenda@visionstrategyandinsights.com www.visionstrategyandinsights.com

Brenda Lee 2000+ sessions since 2001 Ana Fernandez 200+ sessions since 2012 Macuqui Robau-Garcia 2000+ sessions since 1997 Sue-Mi J. Jones 300+ sessions since 2003

Vision Strategy and Insights is a full-service multicultural research and strategy firm with unique expertise in moderating focus groups among Hispanic, African-American and Asian consumers. We match our diverse group of moderators with the cultural and language requirements of each study, allowing us to conduct effective in-culture, in-language research that connects with multicultural respondents. VSI moderators have conducted focus groups in multiple languages in a wide variety of categories: CPG, health/pharma, auto, financial, telecom, retail, media/ entertainment, social/nonprofit and political.



Voccii, LLC Charlotte, NC USA Ph. 704-451-4706 gayle.ireland@voccii.com

Gayle Ireland 300+ sessions since 1999

Exceptional qualitative research from senior practitioners. Voccii is a market insights, research and brand consultancy combining the best of research and strategic expertise. We bring over 50 years of moderating and qualitative research experience and leverage our depth from many industries, regional to global in scope, B2B and B2C, to provide exceptional and strategic insights from a variety of qualitative research techniques - focus groups, online groups, shop-alongs, in-depth interviews and executive interviews. Voccii brings the voice of the customer through unparalleled research results.



Wyckoff Partners Los Angeles, CA USA Ph. 310-844-7728 phil@wyckoffpartners.com www.wvckoffpartners.com

Phil Wyckoff 1500+ sessions since 2012

Wyckoff Partners is a forward-thinking qualitative research consultancy with a track record of uncovering insights that create impactful marketing strategies for its clients. We design and execute world-class qualitative research that is laser-focused on addressing critical business issues while building deep relationships with our clients' cross-functional teams. We are passionate about innovation and brand communications, with particular interest in semiotics and its commercial applications to drive competitive advantage. In addition to strong moderating, we stand apart in our ability to deliver memorable, story-driven, visually engaging deliverables that are highly strategic and action-oriented. Also, we manage global qualitative studies in addition to U.S. focused-projects.

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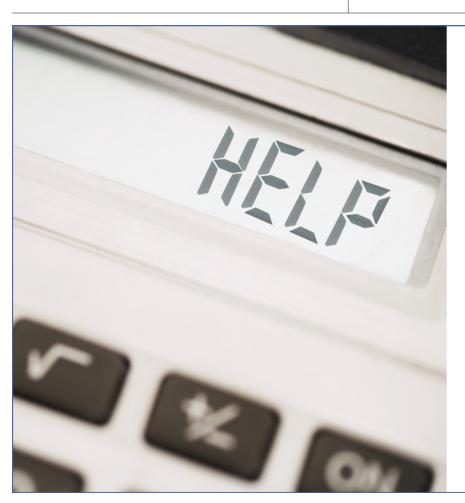
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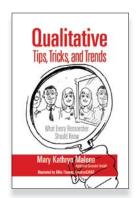
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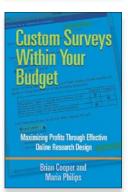
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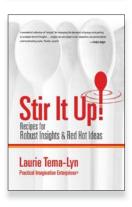
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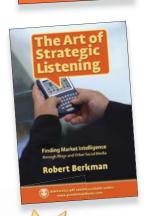
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BEFORE YOU GO ••• Conversations with corporate researchers

10 minutes with...

Michael Rosenberg

Managing Director, J.P. Morgan's Corporate and Investment Bank Strategy

What do you believe is the biggest challenge to B2B MR today?

Our collective talent pipeline. B2B market research is not often considered a natural starting point for an entry-level career in research. However, we can change that perspective. Additionally, there are often gaps in the career progression ladder that need to be filled to enhance retention. Naturally, this needs to be managed as a company- or agency-specific issue. However, we as an industry need to be conscious of the issue and facilitate the right discussions, as there are many B2B organizations that can share and educate on best practices in identifying, nurturing and retaining talent.

Do you feel that qualitative research is unfairly overlooked these days? If so, how would you recommend better incorporating it? If not, could you describe a few ways you see it being leveraged?

In an age of DIY research and free online survey tools, there are some who may be tempted by the opportunity to look toward fast, inexpensive quantitative survey methods ... but as they say, you get what you pay for. In talking through research opportunities, there are times when some may leap to the online survey as a solution but that tends to be driven by familiarity with the method and perceived ease of execution, more than anything else. My experience has shown that once you have a dialogue around business objectives and the breadth of research methodologies available, qualitative research quickly becomes much more attractive and, in many cases, the obvious choice. Thus, my focus is on working closely with our business partners to ensure that we identify the optimal research method based on what we're trying to achieve and the approach that works best with our client base. As a result, the majority of our research tends to be qualitative in nature. We leverage qualitative research to help support our product development efforts, to inform the development of many of our strategies and of course to evaluate the client experience.

What are the greatest roadblocks when conducting client-experience research in the financial services sector?

Roadblocks is certainly not a term that I find myself using. This is primarily driven by the fact that all of our research programs are sponsored by and executed in close partnership with the businesses that we support. Thus, our primary focus is on tailoring our programs to our target audience. With that in mind, we can then thoughtfully design and execute our research studies leveraging best-in-class business processes.

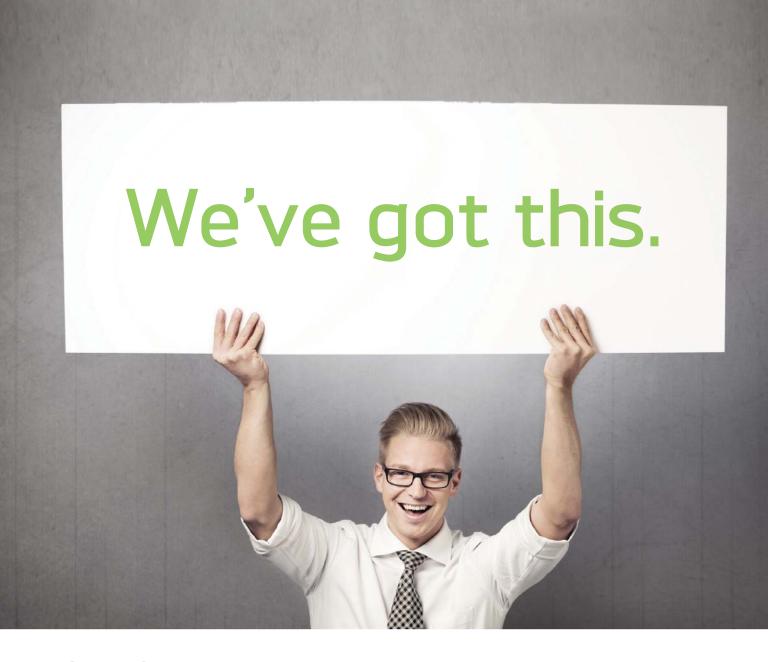
Are there any challenges related to data privacy or other data security issues that you face as a financial services researcher? How do you work with or around them?

Both data privacy and data security should be fundamental components of the research process, regardless of industry. As such, we have strict standards and measures that are integrated into the planning and execution of all our research programs. Additionally, whenever we use a third party, that firm is held to the same standards and is rigorously evaluated before, during and after any engagement.



"My experience has shown that once you have a dialogue around business objectives and the breadth of research methodologies available, qualitative research quickly becomes much more attractive and, in many cases, the obvious choice."

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