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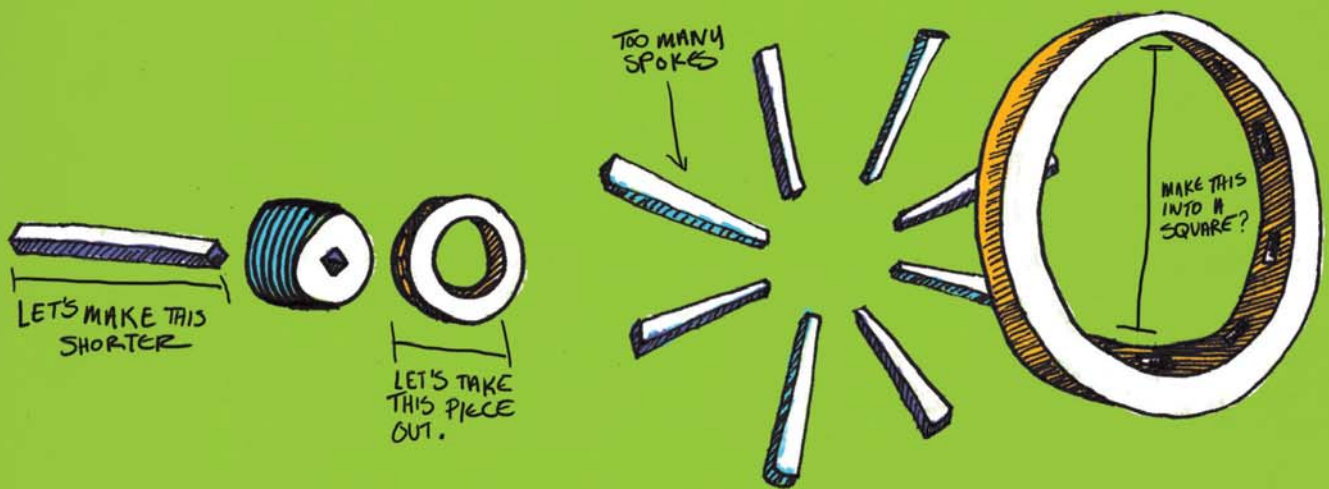
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Quirk's Marketing Research Review
July 2017
Volume XXXI Number 7
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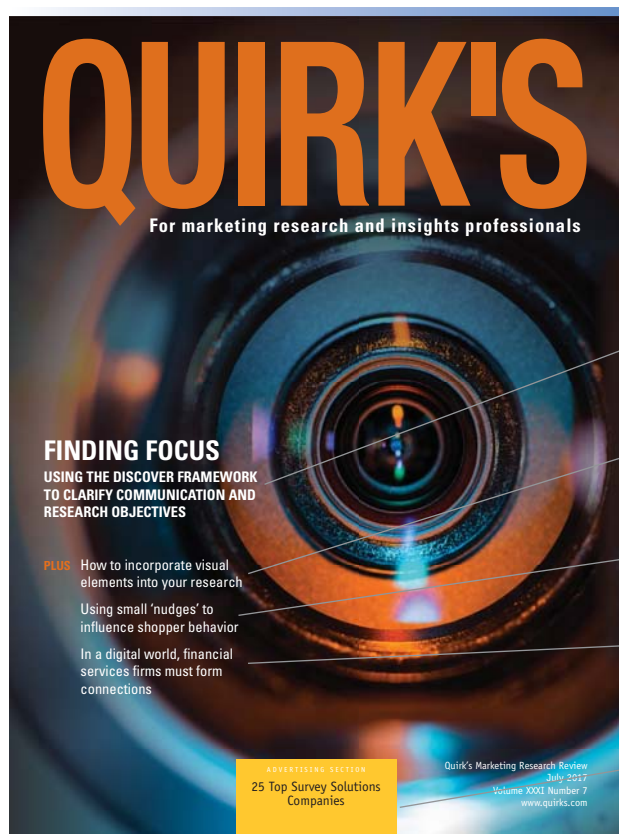
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Interested in finding out how your salary stacks up? This September we will once again publish our Corporate Researcher Report – an independent study, written for and developed with the help of client-side marketing research and insight professionals. This report includes responses from the annual Quirk's corporate researcher salary survey. You can check out our 2016 salary survey findings at www.quirks.com/tools/salary-survey.

Q // E-newsworthy

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In Case You Missed It

news and notes on marketing and research

●●● leisure research

Gardening is, uh, growing

Baseball may be the nation's unofficial pastime but gardening continues to make gains. The \$36.9-billion-dollar DIY yard and garden industry is growing at a slow and steady rate, led by Millennials and by growth in food gardening, according to this year's National Gardening Survey from the National Garden Marketing Research Company.

"While headlines may not be as dramatic as in 2015, when spending finally leapt out of the recession, the 2016 National Gardening Survey shows steady consumer consolidation," says industry analyst Ian Baldwin, who contributed to the report.

Seventy-four percent of all U.S. households participated in lawn and garden activities in 2016, up from 70 percent of households in both 2013 and 2014, but just slightly below 2016. The average amount spent per household was \$407.

"Though overall gains were small, the 2016 data indicates that consumers are feeling more confident in their discretionary spending of both time and dollars with regard to gardening," says Baldwin.

Flower gardening made a moderate comeback while water gardening showed remarkable growth to an all-time high participation rate of 19 percent.

While the survey finds DIY gardening is now a \$36.9B industry, "do it for me"

shows strong growth as more affluent consumers pay others to do the work. The number of households purchasing landscape design, installation and maintenance services has doubled in the past six years.



●●● pharmaceutical research

Docs offer poor diagnosis for pharma Web sites

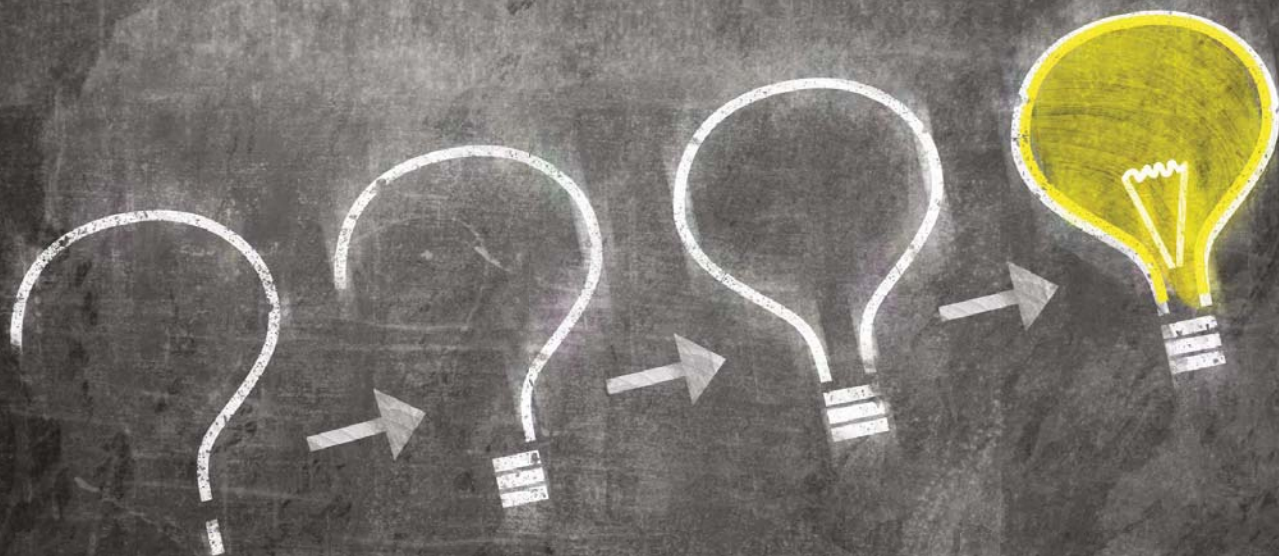
Physicians value useful content from pharma companies that helps them do their jobs and manage care better but physicians feel few are doing a good job of providing quality digital content and say most of what they get from drug companies online is advertising, according to a study by Manhattan Research, Burlington, Mass.

The findings, based on a survey of U.S. physicians across 25+ specialties, show that 27 percent of physicians say they find pharma Web sites to be a credible source of professional information. Seventy percent of physicians agree "it is crucial that pharma companies provide education resources rooted in science to gain my trust."

However, 62 percent of physicians agree the info pharma companies provide on third-party Web sites for health care professionals is "always ads" for their products and 34 percent say they trust the information provided on these Web sites. Nearly half (49 percent) of physicians who watch professional online video agree it influences their clinical decisions but 52 percent say they don't think any pharma company is doing a good job at providing quality physician video content.



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As shoppers, Gen Z consumers have their own agendas

Isometimes pity marketers. Just when it seems like they might have a handle on Millennials and their habits, along comes Generation Z, who, if the results of a recent Accenture study are any indication, seem likely to further flummox and test the patience of marketers aiming to reach them.

Accenture surveyed 9,750 respondents from 13 countries across six continents who have shopped both online and in stores within the three months prior to the survey, which was conducted in October and November 2016. Survey respondents were selected and vetted by ESOMAR. Respondents belonged to one of three age groups: Gen Z (18 to 20 years), young Millennials (21 to 27 years) and older Millennials (28 to 37 years). Each of these three age groups accounted for approximately one-third of all respondents.

The upshot? Gen Z shoppers lurve their social media and their digital tools, they crave and get validation on their purchases from their (online and real-world) friends and family, they are still forming their brand preferences and they are open to new shopping methods such as curated subscription-type offerings for fashion and automatic-replenishment programs.

Here are some highlights, as taken from the study's press materials:

They are all about visuals – videos and pictures. YouTube is the most-regularly used social media platform, cited by 84 percent of Gen Z respondents, while Facebook is still the most popular social platform for both younger (21-27 years old) and older (28-37 years old) Millennials. Two-thirds (66 percent) of Gen Z shoppers regularly use Instagram, compared with only 40 percent of Millennials, and Gen Z shoppers are more than twice as likely as Millennials to use Snapchat (54 percent versus 38 percent for younger and 22 percent for older Millennials).

They regularly turn to their influencer circles. Gen Z consumers are more likely than both younger and older Millennials to purchase an item due to: what their family thinks; recommendations from watching YouTube videos; what their friends think; and comments on social media. In addition, when shopping online, Gen Zs are usually more likely than both younger and older Millennials to: chat with an online sales assistant; check in-store for more information; ask friends' opinions via social media, text or phone; and ask family members' opinions via social media, text or phone.

They haven't formed strong brand loyalty. Only 16 percent of Gen Zs shop at a single store for clothing/fashion (compared with 26 percent of older Millennials); only 19 percent shop at a single store for health and beauty items (compared with 34 percent of older Millennials); and fewer than 38 percent shop at a single place for groceries (compared with 55 percent of older Millennials). In U.S., brand loyalty among Gen Z is even weaker, with only 5 percent of U.S. Gen Zs shopping at a single place for clothing.

They are impulsive buyers and willing to




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pay for speedy delivery. Gen Z shoppers are more likely than Millennials to make a purchase because: they just wanted to buy something; they randomly saw something they liked; or it was recommended by a friend or family member. In addition, Gen Zs crave speedy delivery more than Millennials do and are willing to pay for it. In fact, more than half (58 percent) of Gen Z respondents said they would pay more than \$5 for one-hour deliveries.

Come to the rescue?

With reports each day of large retailers shuttering stores and facing declining sales, the future of retailing is uncertain. Might Gen Z shoppers come to the rescue? Sixty percent of Gen Z shoppers surveyed still prefer to purchase in-store and nearly half (46 percent) will still check in-store to get more information before making an online purchase. In the U.S., over three-quarters (77 percent) of Gen Z respondents said that the brick-and-mortar store is their preferred shopping channel.

While it's one thing for Gen Z shoppers to shop in-store and another thing completely for them to buy in-store, perhaps at this point retailers should be happy that the store-based method of shopping is still so popular with these nascent consumers. 



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●●● advice for researchers

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We hear a lot of buzz about survey-taking on mobile devices. But how many panelists are really using their mobiles to take surveys?

Laptops are still the most popular device for survey-taking. At Branded, we find many surveys are not optimized for mobile, driving survey-takers to their laptops. But mobile has arrived and should be fully embraced by the industry. About one in five Branded panelists use their mobiles most often to take surveys. Among younger generations, the rate of mobile survey-taking is even higher. About one in three Millennials use their mobiles most often to take surveys.



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Is there a simple way to figure out sample size for a conjoint study?

Conjoint analysis is great for understanding consumer decision-making using trade-offs, especially in the product/price space. Research using our database of conjoint studies has shown that there is a simple and robust solution to the sample size question. Since preference shares are the most widely-used output, the solution is to calculate error tolerances around them. It turns out that conventional sample size calculations hold up very well here – simply apply those to determine the needed sample size for conjoint studies.



Cindy Dumlao
Sensory Manager, Wrigley



What is your preferred method when conducting interviews with consumers?

When we are developing a new product, I am a huge advocate for taking prototypes to consumers early on, outside the confines of the team and the walls of our offices. Listening to and seeing consumers' reactions for the things we missed allows us to make improvements before we get deeper in product development – before it's too late. Teams are typically uneasy about this process. I always say it's not about consumers nit-picking your product but to learn how we can make it better. Better is good! Then the light bulb turns on!

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IN FOCUS

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



// Survey Monitor



... television research

Watch TV on TV? How quaint!

Big jump in viewing on small(er) screens

Signaling an accelerating shift in digital video consumer behavior, the percentage of consumers who prefer watching TV shows on television sets plummeted by 55 percent over the past year, from 52 percent to 23 percent, according to findings from the Accenture 2017 Digital Consumer Survey.

The global online survey of 26,000 consumers in 26 countries reveals that consumers increasingly prefer to watch TV shows on devices such as

laptop and desktop personal computers and smartphones. More than four in 10 consumers (42 percent) said they would rather view TV shows on a laptop or desktop, up from 32 percent in last year's survey. Thirteen percent said they prefer watching TV shows on their smartphones, compared with 10 percent last year.

The decline in TV viewing over the past year tracks with a four-year trend. As recently as 2014, the survey revealed that nearly two-thirds (65 percent) of consumers preferred the TV set for viewing TV shows.

The most recent findings, summarized in a new Accenture report titled *Winning Experiences in the New Video World*, show that only one

in five consumers (19 percent) now prefer to watch sports games on their TVs, down from 38 percent in the prior-year survey.

"The dominance of the TV set as the undisputed go-to entertainment device is ending," says Gavin Mann, global managing director for Accenture's broadcast business. "While a great number of people still watch plenty of TV shows on TV sets, our research uncovers a rapid acceleration in their preference for viewing on other digital devices – especially laptops, desktops and smartphones."

The report reveals a particularly steep decline over the past year in the percentage of India's consumers who prefer to view TV shows on TV sets. That percentage dropped 78 percent, from 47 percent to 10 percent. In the U.S., the number fell 57 percent (from 59 percent to 25 percent) and in the U.K. it dropped 55 percent (from 56 percent to 25 percent).

"Driving this rapid shift in consumer preferences is the growing convenience, availability and quality of more personalized and compelling content on laptop and desktop personal computers and smartphones," says Mann. "The massive and accelerating push by communications and media companies to provide ubiquitous content – TV everywhere including over-the-top – has empowered consumers to access high-quality content across multiple devices."

While consumers increasingly prefer to watch TV shows on laptops and desktops, the smartphone is becoming the preferred device for watching short video clips. More than one-third (41 percent) of consumers said they would rather view these clips on their mobile handsets, a substantial increase from 28 percent last year. In contrast, the number of consumers



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who said they would rather watch video clips on their laptops and desktops dropped slightly, from 47 percent to 44 percent over the last year, while the number who said they prefer to view these clips on their TV sets dropped even more, from 16 percent to only 5 percent.

The report makes several recommendations for how media companies should respond to the shift in consumers' video consumption habits from TV sets to other devices. These include: identify new ways to engage consumers with more-personalized video content across more types of screens; use more granular consumer data, segments and predictive analytics to help anticipate consumer preferences and find content they desire; and focus more on their target audiences to identify exactly what content their viewers want to receive and when, for how long and on what type of screen.

Between October and November 2016, Accenture conducted an online survey with approximately 26,000 consumers in 26 countries: Australia, Brazil, Canada, China, Czech Republic, France, Germany, Hungary, India, Ireland, Italy, Japan, Mexico, Netherlands, Poland, Romania, Saudi Arabia, Singapore, Slovakia, South Africa, Spain, Sweden, Turkey, United Arab Emirates, the U.K. and the U.S. The sample in each country was representative of the online population. Ages of respondents ranged from 14 to 55 and over.

These findings are derived from a multiple-choice question answered by survey participants: "Which types of device (s) do you prefer to use when accessing different types of content?" The options included laptop and desktop personal computers; smartphones; tablets; TV screens; game consoles; "other" and "none."



●●● pet food research Millennials driving market for healthier pet foods

Seeking natural, organic products

Between their growing numbers and affinity for natural pet products, the Millennial cohort wields significant buying power for the industry, according to research firm Packaged Facts in the report Millennials as Pet Market Consumers.

Millennial consumers – adults between ages 18 and 34 – are ready to coddle their pets using the most sustainable ways possible. The market for naturally-made organic pet products generates billions of dollars in the pet industry each year and chief among the drivers of this sustainably-minded trend are younger current and prospective pet owners.

The trend toward natural, organic products is nothing new in the U.S. pet product market, especially as product lines both big and small respond to a growing demand for more naturally-made, healthier-for-pets products. Traditionally Baby Boomers have dominated the pet market consumer landscape and set market trends. Specifically, those pet

owners aged 40 to 54 spend the most on pets and related products but they spend less after reaching the age of 60. Because more and more Boomers have reached or are closing in on their 60th birthday, younger pet owners could set the pet market landscape on a new course.

More Millennial pet owners brought up in an increasingly health-conscious U.S. – and fewer Baby Boomers – means an upward trajectory for the natural, sustainably-made pet food trend. Packaged Facts' National Online Consumer Survey data identify one in three of U.S. pet owners as Millennials, responsible for 43 percent of pet owner growth between 2007 and 2015. As Millennials get older and their budgets increase, spending on natural, organic pet food products will only continue to grow.

The report indicates the strength of Millennials' impact on the pet product market and their inclination toward natural, organic products. Here are four of the report's notable results:

More than half (55 percent) of Millennial pet owners are willing to try holistic and natural-branded nutritional supplements before resorting to conventional pet medication, as opposed to only 30 percent of owners 35 and over. But when the only option left is to buy conventional pet medication, more than half (52 percent) of Millennials buy meds, compared to only 28 percent of any other demographic.

Nearly three-quarters (69 percent) of Millennial pet owners are more likely to consider foods whose recipes use naturally-made ingredients over standard, mass-produced foods, versus fewer than half (44 percent) of owners over 35.

Three-quarters (75 percent) of Millennial dog owners agree that fear of pet food contamination or product safety is a key consideration in the foods they buy, compared to only 66 percent of their older counterparts.

Almost two-thirds (64 percent) of Millennial cat owners compared to just 49 percent of other owners are likely to feel the same way.

Millennials are on the lookout for products whose labeling is transparent and green and are most likely to use pet foods with formulations geared toward enhancing the health of their pets, including pet foods characterized as organic, holistic, non-GMO and grain-free.



●●● leisure research Global study: Women more avid book readers than men

China leads in daily reading

A 17-country report released by researcher GfK shows that 30 percent of the international online population surveyed read books “every day or most days.” This is led by China at 36 percent, closely followed by Spain and the U.K. at 32 percent each. However, if the segment is widened to include both daily readers and those who read “at least once a week,” the international total rises to 59 percent, with China firmly in the lead (70 percent of its population), followed by Russia (59 percent) and Spain (57 percent).

High-income households read

books more regularly than low-income households. Over a third (35 percent) of people in high-income households say they read books “every or most days,” compared to a quarter (24 percent) of those in low-income households. Added to this, one in 10 people in low-income households claim that they “never” read books – triple the percentage reported in high-income households (3 percent).

Overall, 32 percent of women report reading books every or most days, compared to 27 percent of men. This gender gap amongst the daily book readers is widest in the Netherlands (30 percent of women versus 14 percent of men) and Spain (40 percent of women versus 25 percent of men), followed by Canada (36 percent of women versus 23 percent of men) and Germany (31 percent of women versus 19 percent of men).

The Netherlands and South Korea have the highest percentage of their online population who report never reading books, standing at 16 percent each. In South Korea, this is fairly evenly divided between men and women, but in the Netherlands it is heavily led by men, with 23 percent never reading books, compared to just 9 percent of women. The countries with the next-highest proportion of those who never read books are Belgium (14 percent) and Canada, France and Japan (all 11 percent).

GfK conducted the online survey with over 22,000 consumers aged 15 or older across 17 countries in summer 2016.



●●● ad research I watch, therefore I trust

News, ‘how-to’ networks
inspire strongest viewer
trust

What is the value of a touchpoint if the source is not trusted? This question remains a key element – sometimes a missing piece – in any discussion about media-planning effectiveness and ROI. A Network Affinity study from researcher GfK MRI looked at viewer trust in and feelings of connection to over 150 TV networks and the ads they air. The research reveals that while trust in networks does not always translate into trust in advertising on those channels in some cases ad trust may actually eclipse network affinity.

Looking at six network categories (each consisting of multiple networks in that genre), the study shows that roughly half of viewers of news (49 percent) and “how-to” (48 percent) networks say they strongly trust those networks. In addition, 46 percent of news network viewers also say that those networks “reflect their personal values.”

When it comes to trust in advertising, viewers of Spanish-language networks express the strongest feelings, with nearly half (48 percent) saying they trust the ads on those networks. Kids and family (31 percent), news (31 percent) and “how-to” (30 percent) networks posted roughly the same

scores for advertising trust, with sports following at 23 percent and broadcast networks at 18 percent.

Spanish-language networks also earned top scores from their viewers in both community (54 percent) and engagement (46 percent) with “how-to” and news networks following closely behind.

“Ad buyers are frustrated that they can’t get a true read on which networks earn the strongest viewer trust and the extent to which this trust impacts their ad messages,” says Lisa Tyler, VP of media and entertainment sales of GfK MRI. “Similarly, networks are concerned that buyers are not considering the relationship they have built with their viewers and buyers are making investment decisions based purely on behavioral data. This study reveals the relationships viewers have with each network and how levels of trust, community and relevancy change when you look past age and gender and into product users, buying styles and lifestyles.”

Across most of the categories, viewers who watch TV on digital devices and streaming services have higher levels of trust in advertising. Those who own Internet-connected devices over-index for trusting ads in five of the six network categories, especially sports and broadcast.

In addition, the study points to opportunities for targeting high-trust viewers who are spenders and/or influencers in key areas. Viewers with high levels of trust in kids and family networks and the ads on them also have higher average levels of spending on computers. And those who trust Spanish-language networks and the ads they show also have higher spending levels for computers than Broadcast network viewers.

The findings come from GfK MRI’s annual Network Affinity research and are based on an online study of roughly 10,000 nationally representative respondents. Data has been fused to GfK MRI’s Survey of the American Consumer for full profiling.



... leisure research Young campers seek more active time outdoors

Hiking instead of fishing

An estimated 13 million U.S. households plan to camp more in 2017 than they did in 2016 and more than 1 million new households have started camping each year since 2014, according to the results of the 2017 North American Camping Report, an annual independent study supported by Kampgrounds of America Inc. (KOA).

Millennials are driving this growth as they take to the outdoors in greater numbers and they have no intention of letting up. Millennials now account for 38 percent of the 75 million active camper households in the U.S., up from 34 percent in 2016, and 51 percent say they plan to increase their camping this year.

Results of the survey indicate that these younger campers are using camping to add more balance to their lives. Their key reasons for camping include spending more time with friends and family, being physically active and improving their overall emotional well-being and health.

Their attitudes about camping are reinforced by their behaviors and, with the influx of younger campers, this is changing the camping landscape overall. Camping is becoming a more social activity and outdoor recreation while camping is shifting to more physically active activities. In this year’s results,

hiking outranked fishing as the most popular type of camping recreation for the first time since the first iteration of the North American Camping Report. Kayaking and mountain biking also saw significant increases.

In an even more promising outlook for the future of camping and outdoor recreation in America, Generation Z teens (ages 13-17) are highly enthusiastic about camping and place a great deal of importance on people their age spending time outdoors. The findings for this group, which are new to the report this year, indicate that teens share their adult counterparts’ feelings about the benefits and emotional connections to camping. This suggests that as more families experience the outdoors, the more likely they are to continue those activities and consequently, this will result in continued increased overall incidence of camping nationally, particularly among families.

The influx of younger campers is changing the camping landscape overall, from who is camping to how people are experiencing the outdoors. In line with their strong enthusiasm for camping with family and friends, Millennials tend to camp in the largest groups. The average group size for Millennials is 10.7, compared to 8.5 for Gen Xers and 7.9 for Baby Boomers.

Camping is becoming more of a family event, with 51 percent of campers reporting they have children in the household, up from 41 percent in 2014. Younger parents are the most likely to say children are enthusiastic about camping (53 percent of Millennial parents).

Not only are these younger campers highly social but they also are more physically active and more likely to gravitate towards recreation such as mountain biking, hiking, running and adventure sports. As a result, more physically active types of recreation are increasing in popularity overall, with mountain biking (+6 percentage points), hiking/backpacking (+4 percentage points), canoeing/kayaking (+5 percentage points) and biking (+5 percentage points) and all gaining

popularity since 2014.

Younger campers are much more diverse, which is contributing to an increasingly multicultural camping landscape overall. Of the 1 million U.S. households that started camping in 2016, four in 10 were either Hispanic (13 percent of new campers, 16 percent of the population), African-American (12 percent of new campers, 12 percent of the population) or Asian-American (14 percent of new campers, 5 percent of the population).

This is a continuing trend driven by younger campers, as a full 30 percent of non-white Millennial campers report that they've started camping in just the past few years, compared to 15 percent of white Millennials.

There has been a large influx of Asian-American campers over the past couple of years and it doesn't appear to be slowing. According to this year's survey results, the proportion of new Asian-American campers is nearly triple what would be expected from overall population figures. This increase is most prevalent among younger Asian-American campers with 43 percent only having started camping in the past couple of years.

One-third of U.S. campers say that they now feel more welcome at national parks than they did several years ago. Large blocs of Hispanic (45 percent) and African-American (42 percent) campers say they feel more welcome when compared to the past.

While most teens bring smartphones with them while camping, not surprisingly and like their adult counterparts, an overwhelming majority say they would still want to go camping if they could not stay in touch with others using their phones or computers. Nearly all U.S. campers bring some type of technology with them while camping but they are evenly split in their opinions regarding whether technology enhances or detracts from their camping experiences. This holds true even among Millennials, with 38 percent saying technology detracts from their camping experience and 36 percent saying it enhances it.

Among campers who say that

access to technology allows them to camp more often, 57 percent state that technology also enhances their trips, suggesting that the ability to access technology improves the quality of the experience simply by allowing them to camp more often.

The desire to visit state and national parks has increased over 2015 and three in 10 U.S. campers say the National Park Service's 100th anniversary in 2016 got them to visit a park they would not have otherwise visited. Millennials were the most likely to claim this (40 percent). This suggests that a growing camper constituency will continue to place high demand on these lands.

Methodology for the U.S. and Canadian household results: This survey was conducted in January 2017 by Cairn Consulting Group, an independent research firm. The sampling methodology targeted a randomly selected sample of U.S. and Canadian households. Sampling was designed to obtain n=2,426 completed survey

among representative U.S. households and n=508 completed surveys among representative Canadian households. A sample of n=2,426 U.S. households is associated with a margin of error of +/- 1.99 percent. Among Canadian households, a sample of n=508 is associated with a margin of error of +/- 4.37 percent.

Methodology for the teen survey results: The results are based on a total of 401 surveys completed among a random sample of U.S. households with children between the ages of 13 and 17. Each survey was completed with a teen respondent whose parents gave prior permission. A sample of n=401 teen campers is associated with a margin of error of +/- 4.9 percent.

All surveys were completed online via an outbound solicitation sent by Survey Sampling International to a randomly selected cross-section of U.S. and Canadian households. The sample of households from which the surveys were completed was statistically balanced to ensure that the results are in line with overall population figures for age, gender and ethnicity.

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Product and Service Update

●●● sensory research Sensory service for CPG firms

Screen up to 6 products

The Institute for Sensory Research (ISR), Harrison, N.Y., has launched Flash Discrimination Testing, a sensory research service designed for consumer packaged goods. The service is based on standard discrimination testing methods used for determining if two products are different from one another through the evaluation of specific sensory aspects of the product. It leverages ISR's existing discrimination panel and allows manufacturers to screen up to six products within a session.

www.sensoryguidance.com

●●● health care research Learn fast with RapidResultsRx

Practitioners and ailment sufferers

In Wilton, Conn., researcher Toluna has launched RapidResultsRx, an approach to obtaining quick-turn insight from medical professionals. Toluna's

health care practice provides health care and pharmaceutical research practitioners with access to physicians, pharmacists, nurses and medical professionals, as well as ailment sufferers. RapidResultsRx allows companies to work with Toluna to build a customized template library, shortening launch time from days to hours.

www.toluna-group.com

●●● the business of research Program aims to enhance MR collaboration

Manage research flow

Survey research platform AYTM (Ask Your Target Market), San Francisco, has introduced a new membership program aimed to make team research collaboration more efficient. Highlights of the new program include: AYTM PRIME and CORP membership options, which provide the ability to manage research flow, surveys, privileges and budgets. These plans provide access to price-sensitivity testing, max-diff and perceptual mapping; the AYTM PRO plan, which includes crosstabs, statistical significance tests and Personality Radar for customer personas; and AYTM ECO, which includes access to extended character limits, piping, conditional logic and more for a small fee per survey as needed.

aytm.com

●●● ad research

New tool tests social media ads

From MFour, Kantar Added Value

MFour Mobile Research, Irvine, Calif., and creative marketing consultancy Kantar Added Value, London, have introduced Emotional Brand Connections, a social media ad testing tool. An intended audience is chosen for a test ad, which is injected into panelists' mobile news feeds. Consumers' natural behavior on the social site is tracked, capturing data on how long they view the test ad, if they turn on audio and if they engage with the ad by liking, clicking or enlarging it. Researchers then survey the test ad's recipients to measure things like brand recall, reaction to the content and caption, emotional connection to the brand and the ad's influence on their intent to purchase.

mfour.com

added-value.com

●●● data presentation Build customer stories with Showreel Generator

Add images, color schemes

U.K. video research firm Voxpopme has launched Showreel Generator 2.0, a solution for building customer stories with new and existing video research. The upgraded solution integrates video editing features into Voxpopme's research platform, with new additions that include the ability to add image slides and color schemes, customizable text slides, subtitles that are fully editable for multilingual projects and captions that allow respondent data to be overlaid on top of the final output.

site.voxpopme.com



quirks.com/articles/2017/20170704.aspx

●●● restaurant research

Prescriptive marketing platform for restaurants

Forecast impact of limited-time offers

Downers Grove, Ill., supply chain management company HAVI has launched a prescriptive marketing platform for the restaurant industry that uses real-time analytics to help marketers more effectively plan their campaigns. The platform gives insight into restaurants' promotional process with machine learning analytics to prescribe and optimize marketing activities. For example, limited-time offers (LTOs) are popular among restaurants because they typically drive sales, re-engage customers and allow brands to test new menu items. The challenge for restaurant CMOs and marketing teams is effectively predicting success or measuring ROI of their LTOs, events and promotions. HAVI's new prescriptive marketing platform lets marketers: forecast sales, profit and guest count impacts of their planned LTOs and promotions; simulate performance of a new promotion up to 18 months in advance; track ongoing promotions and know in real time when to make adjustments; get recommendations for new LTOs and promotions that will deliver optimal results; and have visibility into the supply chain at a granular level – by menu item and restaurant.

www.havi.com

●●● Briefly

■ Stamford, Conn., researcher FocusVision has released three new features for FV Decipher, its online survey and reporting solution. The new features make FV Decipher fully compatible with ConfirmIt XML for delivering data transfers and imports. The files can be uploaded directly into FV Decipher and all elements and logic will be converted into FV Decipher's

structure. Other recent updates include automatic quota reassignments, which take live edits to surveys and automatically applies them to the quota report, and reusable answer lists, which allow users to establish a single answer list, which links to all questions using that same list.

www.focusvision.com

■ Nielsen, New York, has launched Quick Screen, an innovation tool that allows FMCG manufacturers to test new product ideas and measure their potential.

www.nielsen.com

■ Mobile solutions firm Field Agent, Fayetteville, Ark., has introduced Jicco, a search engine designed to give companies real-time answers to retail questions, including answers about store-level promotions, pricing, on-shelf availability, competitive activity and shopper sentiment.

www.fieldagent.net

■ Louisville, Colo., customer experience management firm Market Force Information has rolled out mobile auditing features for its Eyes:On app, enabling Market Force clients and their auditors to report on brand compliance from a tablet or smartphone. Eyes:On uses geofencing technology to identify and verify sites targeted for audits.

www.marketforce.com

■ Cedar Knolls, N.J., marketing analytics firm i.Predictus has launched Jules, a predictive analytics tool that allows marketers to see how their marketing plans will perform so they can better plan and budget their media spend.

ipredictus.com

■ Digital market intelligence company SimilarWeb, New York, has released SimilarWeb Digital Insights, a solution that provides a granular view into key market signals, including purchase intent, brand share, channel conversion and product category performance.

www.similarweb.com

■ Simmons Research, New York, has partnered with U.K.-based cross-media measurement firm RealityMine to pro-

vide the TouchPoints/Simmons Fusion, a joint solution designed to help brands and media companies create and execute more effective multimedia campaigns across platforms. The solution combines RealityMine's TouchPoints service, which provides insights into how, where and when all media is consumed, with Simmons National Consumer Study, which contains over 60,000 variables related to consumer psychographics, behaviors, attitudes, intent and brand affinity.

www.simmonsresearch.com
www.realitymine.com

■ Omnichannel solutions firm NCR Corporation, based in Duluth, Ga., has integrated its point-of-sale platform with analytics and customer engagement firm Showtime Analytics' data platform. The combined technology allows cinemas to better understand customer needs and improve customer experience.

www.ncr.com

■ Customer experience consulting firm Walker Information, Indianapolis, has released Walker TrackIt, a collaboration platform designed to manage systemic issues that affect a wide customer base. Once a cross-functional team determines which issues to act on, Walker TrackIt helps the team establish ownership, document activity, track progress, communicate updates and validate success.

www.walkerinfo.com

■ Nielsen, New York, has launched Everyday Analytics, a new suite that will make analytics more accessible for everyday decisions across all FMCG growth drivers, including price and promotion, advertising and innovation. New tools within the Nielsen Everyday Analytics suite will be added through 2017 in the U.S., Canada and multiple European markets.

www.nielsen.com

■ Research software company ican-makeitbetter has announced the latest version of its platform, featuring piping and based-on – two new survey features engineered to work within the fully-integrated platform.

Users can “pipe” in open-ended text or selected responses from any previous question(s) in the survey. The based-on function can show answer options based on any previous lists shown in a survey. It works across matrix, single choice, multiple choice and rating. [icanmakeitbetter.com](#)

■ Researcher Kantar TNS, London, has launched screening solution eValueNow on ZappiStore. The solution enables CPG/FMCG brands to identify ideas with strong potential by measuring each concept’s ability to drive topline business growth and avoid cannibalizing existing business. [www.tnsglobal.com](#)
[zappistore.com](#)

■ Eye-tracking and emotion measurement platform Sticky, San Francisco, has launched Sticky AdVantage, its latest content optimization solution that introduces a new currency for ad valuation and performance measurement based on eye-tracking technology. AdVantage uses two new metrics – time engaged and percent seen – to help campaigns achieve higher engagement and greater ROI. [www.sticky.ai](#)

■ Adobe, San Jose, Calif., and Microsoft, Redmond, Wash., have made available their first set of joint solutions designed to help enterprises with their customer experiences. The solutions will use Adobe Experience Cloud and Microsoft Azure, Dynamics 365 and Power BI. The two companies are also collaborating on a semantic data model for understanding and driving real-time customer engagement, standardizing how data is structured and expediting the process of gaining insights from large amounts of data. Lastly, they are collaborating on an industry standard to define and unify the language for marketing, sales and services data needed to deliver digital experiences consistently at-scale. [www.adobe.com](#)
[www.microsoft.com](#)

■ Oslo, Norway-based researcher Confrimit has launched Confrimit Compass, a five-stage voice of the customer maturity model. Created in conjunction with a research team from Rockbridge Associates Inc. and professors from the University of Miami and St. John’s University, Confrimit

Compass provides an assessment to help organizations work on the right elements to drive customer experience success. The assessment considers programs from five perspectives: vision, design, engagement, action and value. [www.confrimit.com](#)

■ Great Neck, N.Y., research agency FRC has launched a new redesigned Web site which includes an updated company news section and blog information. [www.frcresearch.com](#)

■ Chicago-based researcher IRI has launched IRI EquityScore, its brand equity measurement and activation solution. IRI EquityScore connects brand equity to actual purchase behavior and can measure results on a longitudinal basis over time, providing marketing activation opportunities for manufacturers and retailers. [www.iriworldwide.com](#)

■ Customer experience management solutions firm Clarabridge Inc., Reston, Va., has introduced CX Contact Center, a full-service solution for analyzing voice of the customer data in contact centers. The solution allows companies to transcribe, aggregate and analyze customer recordings and interaction data in the contact center and integrates voice data with chat logs, agent notes, e-mails, social interactions and CRM data. [www.clarabridge.com](#)

■ Bethesda, Md., researcher Abt Associates has launched new data science and technology capabilities for its clients. The offerings include data capture, data wrangling, data analytics and data visualization and dissemination. In addition, the new Data Science, Surveys and Enabling Technologies division within Abt will combine the capabilities of its survey and research unit, formerly known as Abt SRBI, with the company’s Client Technology Center. [www.abtassociates.com](#)

■ Deloitte, New York, has introduced its Consumer Products Insights Hub, a platform of analytics solutions. The platform combines Deloitte’s supply chain, pricing, sales, marketing, R&D, finance and enterprise performance management assets into one suite customized across all functional areas of a consumer

products company. The solutions can be used individually or as bundles based on the specific needs of the organization. [www2.deloitte.com](#)

■ Reston, Va., firm comScore will make available campaign delivery metrics for Twitter ads – including demographics, reach, frequency and GRPs – in validated Campaign Essentials, its campaign measurement offering. Reporting for U.S. campaigns will soon include measurement of Twitter ads that run on mobile devices. Reporting will also be available for Spain, Canada and the U.K. later this year. [www.comscore.com](#)

■ London-based digital marketing agency Isobar has launched MindSight Direct, a version of its proprietary applied neuroscience product MindSight. The Direct version includes a faster turnaround time; customizable elements like audience, demographics and questions; validation in applied-neuroscience approach and metrics; and more. [www.isobar.com](#)

■ Research firm Alter Agents, Los Angeles, has published a new e-book, *Cherish Complexity: The Power of Acknowledging Human Intricacies*, available on the firm’s Web site. [www.alteragents.com](#)

■ Social media management platform Sprinklr, New York, has launched five extensions of its Experience Cloud with new solutions for each major customer-facing department – marketing, advertising, research, care and commerce – on a unified platform for customer experience management. [www.sprinklr.com](#)

■ San Francisco-based data collection firm Survox Inc. has reported that it is leveraging the knowledge and resources offered through the IBM Global Entrepreneur community to speed deployment of its voice-based data collection and analysis products. Participating in the program allows Survox to take advantage of IBM Watson’s natural language processing technology while focusing its resources on developing the technology to capture and extract actionable data. [www.survoxinc.com](#)

■ Sacramento, Calif., marketing automa-

tion software firm Retainly has released Customer Engagement Score, a metric used to measure customer engagement. The score was built with proprietary algorithms developed by the firm's engineers and includes statistical calculations with inputs from engagement factors like e-mail open counts, e-mail click counts, customer Web session counts and more. The firm has also introduced Customer Rank, which ranks customers based on the Customer Engagement Score and helps identify and position the most valuable customers or leads.
www.retainly.com

■ Reston, Va., firm comScore has introduced Facebook demographic metrics to its validated Campaign Essentials (vCE) campaign measurement suite. VCE now includes measurement of display and video ads that run on desktop and mobile platforms on Facebook, Instagram and the Facebook Audience Network.
www.comscore.com

■ Boca Raton, Fla., mobile marketing services firm 3Cinteractive has released its 2017 Mobile Loyalty Progress Report, available on the firm's Web site. The report provides an update on how brands are bridging the technology gap in offering mobile-enabled loyalty programs to consumers.
www.3cinteractive.com

■ Seattle-based company Usermind has integrated its Customer Engagement Hub with Zendesk Inc.'s cloud-based customer service software. The integration provides organizations with more context on customer relationships and delivers automated customer journeys to improve customer engagement, retention and revenue.
usermind.com

■ Warren, N.J., researcher Lightspeed Health has added QuestionArts, a suite of intelligent survey design tools, to its health care product portfolio. It is now available in all Lightspeed Health key markets.
www.lightspeed-health.com

■ Marketing solutions firm Success Drivers, Santa Barbara, Calif., has introduced Creative.AI, a solution based on artificial intelligence that extracts concrete guidelines of successful adver-

tising from ad testing data. Creative.AI uses ad testing survey data to identify which creative vehicle and emotional archetypes used in ads are most effective in boosting brand strength and willingness to buy.
www.success-drivers.com

■ Reston, Va., firm comScore has reported that it will offer free viewability measurement to clients across global markets. ComScore Viewability is a baseline offering that allows digital media buyers and sellers to measure viewability rates across display, video and mobile inventory. It will become available globally this summer as a free self-service offering with baseline reporting metrics, delivered through a redesigned user interface.
www.comscore.com

■ Portland, Ore., technology company Dialsmith has released two new versions of its audience response tool Perception Analyzer (PA) – PA 9.0 and PA 9.0 Media, which are compatible with the latest operating systems and high-resolution displays. The Media version also adds new features, allowing the production of moment-to-moment overlays to be made directly in the software and minimizing the need for additional external equipment.
www.dialsmith.com

■ Nielsen, New York, has launched enhanced capabilities within Social Content Ratings to support the analysis of owned and organic activity within the total social TV conversation. The new analytical capability within the current Social Content Ratings platform will include Twitter data at launch with plans to incorporate Facebook and Instagram measurement at a later date. The enhancement is available in Australia, Italy, Mexico and the U.S.
www.nielsen.com

■ U.K.-based mobile survey solutions firm OnePoint Global has launched its In-App mobile survey solution, a voice of the customer insights tool that collects feedback from inside an existing customer app – iOS or Android.
www.onepointglobal.com

■ The Dieringer Research Group Inc., Milwaukee, has released an e-book,

Are You Delivering on Your Brand Promise?, available for free on the firm's Web site.
www.thedrg.com

■ Plano, Texas, firm Research Now has launched a new automated research solution, SmartAR. The solution is available in standard, modular and custom versions: SmartAR Standard uses pre-configured templates; SmartAR Modular provides access to a suite of modules that allows clients to design a research template with a set of configured question types; and SmartAR Custom allows clients to create a proprietary survey template. SmartAR is immediately available in the U.S. and Canada and will be rolled out in EMEA and APAC in early June.
www.researchnow.com

■ 20|20 Research, Nashville, Tenn., has launched Ethno360, which provides a 360-degree spherical view for digital ethnographies. The 360-degree video technology can be used for in-home ethnographies, shop-along experiences, meal preparation studies and more. Participants are also able to relive the recorded experience with researchers via the firm's QualMeeting interview platform.
www.2020research.com

■ U.K. software company Digital Taxonomy has launched Codeit, a machine-learning tool that helps researchers and analysts code answers to open-ended questions. The cloud-based software-as-a-service tool continually learns from users and becomes more helpful over time, facilitating collaboration on coding projects.
www.digitaltaxonomy.co.uk

■ Reston, Va., firm comScore has introduced OTT Intelligence, a syndicated service that measures U.S. household viewing of over-the-top content on television screens. The service is based on the company's Total Home Panel, a research platform that measures consumer behavior across home network-connected devices.
comscore.com

■ Deena Hollander, former vice president of Edison Research, has launched Scorecard, an online music test for the radio industry and the first product by Hollander's new company, Bridgewater, N.J.-based Advantage Music Research.
www.advantagemusicresearch.com



Experiments in predicting survey completion rates

| By Lori Dockery

snapshot

The author used a February 2016 Quirk's article as the impetus to explore the impact of various variables on survey completion rates.

My inspiration for writing this article came from a story by Dan Coates, MaryLeigh Bliss and Xavier Vivar in the February 2016 issue of *Quirk's* ("Ain't nobody got time for that" The impact of survey duration on completion rates among Millennial respondents") in which the authors compared median completion time with completion rate in order to find a rule for maximum survey length. At first, I only wanted to replicate their study with our respondents and see if my results would be similar. Once I began the task of reviewing our project data, however, I decided to expand the task to look at several additional variables. I wanted to be able to predict completion rate given my knowledge of other variables, too.

The task was bigger than I anticipated, largely due to differences in survey software. For example, some products did not capture survey completion time at all, while others captured elapsed time but did not take into account starting and stopping or leaving the survey open while doing something else for an extended time.

Also, I made the decision to only use studies which had been completed while I'd been working at Vernon Research Group in order to make certain I was accurately assigning some of the variables. This still gave me 104 unique data points over a four-year period. Many studies had unique situations for different partici-

pant segments, including different incentives and whether the client was masked or not, so each situation was treated as a different data point.

Relationship between completion time and completion rate

First, let's take a look at the comparison of median completion time with completion rate so you can see how that compares to the findings of Coates, Bliss and Vivar. I used the time to complete each page of the survey instead of the total elapsed time to reduce the amount of error caused by respondents taking breaks from the survey. When calculating completion rate – the ratio of those who fully completed compared to those who started – I only considered respondents who had passed all screening questions, so the rates may be slightly higher than reality.

Completion time alone accounted for over 17 percent of the variance in the completion rate (Figure 1). The best fit for my data was a straight line, not a curve like Coates, Bliss and Vivar found. Just based on this evidence, there was no clear survey completion time indicated for keeping a high completion rate.

Vernon Research Group owns and maintains the Iowa Opinion Panel (IOP). The IOP is in an opt-in panel that contains thousands of Iowans as well as some residents in Western Illinois.

I decided to simplify my results and only focus on the surveys completed using the IOP, which parallels the focus used by Coates, Bliss and Vivar. Figure 2 displays these results.

When reviewing the data with only the

quirks.com/articles/2017/20170705.aspx





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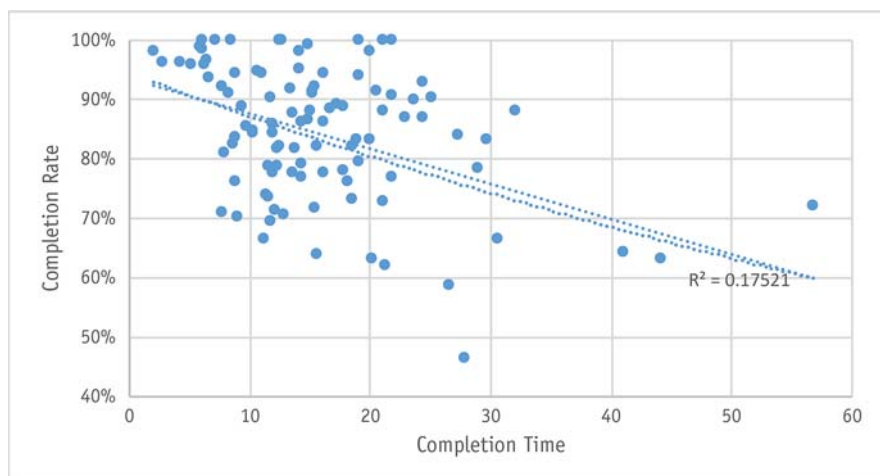


Figure 1: Completion rate by completion time – overall

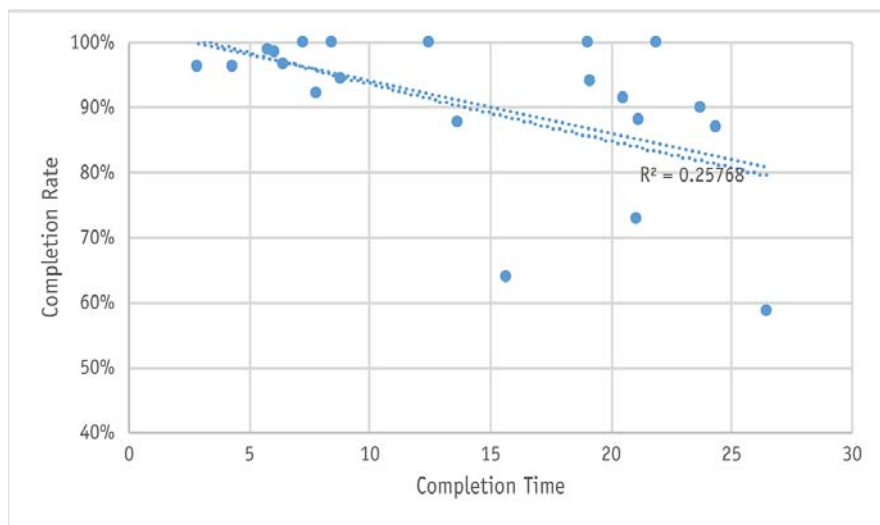


Figure 2: Completion rate by completion time – Iowa Opinion Panel

surveys completed by IOP panelists, completion time accounted for nearly 26 percent of the variance in completion rate. The best fit line was still linear, however, and it showed no clear drop-off point. At 14 minutes, however, we can see the first instance of a completion rate less than 90 percent. It is clear that longer surveys will have lower completion rates even with opt-in panels or lists.

Variables used in models

Now I'll show you how I complicated matters. Below is a list of the variables I captured. Some are self-explanatory, while others I have defined. These models are based on all of the data I

included, not just IOP-based studies.

Professionals vs. Consumers –

Professionals was indicated if we were surveying a very specific type of profession, such as an architect or engineer. Otherwise, Consumers was indicated.

Local vs. National vs.

International – Local included Iowa only. Anything including other states, even nearby states, was coded as National.

Incentive Was IOP Points

Incentive Was Drawing – The value of the gift to be given out was multiplied by the final likelihood of winning.

Incentive Was Gift Card

Incentive Was Report – Some surveys offered an overall report of the final results.

Incentive Value – This was the cash value of whatever incentive was used.

Survey Included Kano

Survey Included Conjoint

Number of Ads – Number of ads (videos, audio or images) each individual would see if they completed the survey.

Number of Numeric Boxes –

Number of numeric fields each individual would see if they completed the survey. This included questions involving percentages and exact numbers that they might have to think about but not questions such as ZIP code or age.

Number of Open-Ended Boxes –

Number of open-ended boxes each individual would see if they completed the survey. Each box available was counted and Others and contact forms were not counted.

Client Masking – If respondents knew throughout the entire survey who the client was, a value of 0 was used. If respondents never knew who the client was, a value of 1 was used. If the client was unveiled at some point in the survey, the proportion of respondents (complete + incomplete) who dropped out before they reached the unveiling was used. Questions that were only about the client but phrased to be deceptive were considered as masked (e.g., “We have randomly selected one of the car dealers to ask you about for the rest of the survey.”).

Familiarity With Client/On a Panel – If masking was complete for all respondents and respondents were not on a panel, a value of 0 was used.

Median Time to Complete –

Completion times were calculated by summing all of the page times in order to remove the error caused by people coming back to the survey to complete after time had passed.

Completes Needed – To create the models, the actual number of completed surveys was used. In practice, the model will be used to predict the completion rate, so the number of respondents needed will be used.

	Unstandardized Beta	Standard Error
(Constant)	1.017	0.070
Professionals vs Consumers	-0.024	0.033
Local vs National vs International	-0.009	0.025
Incentive Was IOP Points	0.090	0.035
Incentive Was Drawing	-0.077	0.033
Incentive Was Gift Card	0.040	0.032
Incentive Was Report	-0.171	0.088
Incentive Value	-0.001	0.001
Survey Included Kano	-0.035	0.025
Survey Included Conjoint	-0.069	0.032
Number of Ads	0.005	0.010
Number of Numeric Boxes	-0.002	0.001
Number of Open-Ended Boxes	-0.002	0.001
Client Masking	-0.029	0.025
Familiarity with Client	-0.002	0.002
Median Time to Complete	-4.675 x 10 ⁻⁰⁵	0.000
Completes Needed	-9.029 x 10 ⁻⁰⁵	0.000

Table 1: Beta Values – Full Model

	Pearson Correlation	p-value
Professionals vs Consumers	0.097	0.332
Local vs National vs International	-0.240	0.015
Incentive Was IOP Points	0.281	0.004
Incentive Was Drawing	-0.137	0.171
Incentive Was Gift Card	-0.029	0.773
Incentive Was Report	-0.365	0.000
Incentive Value	-0.354	0.000
Survey Included Kano	-0.149	0.134
Survey Included Conjoint	-0.134	0.180
Number of Ads	0.127	0.203
Number of Numeric Boxes	-0.378	0.000
Number of Open-Ended Boxes	-0.167	0.094
Client Masking	0.089	0.373
Familiarity with Client	-0.099	0.325
Median Time to Complete	-0.419	0.000
Completes Needed	-0.080	0.029

Table 2: Correlations Between Variables and Completion Rate

Full model

Because my primary reason for this study is to predict completion rates, I was most interested in the regression model containing every variable (Table 1). This model accounted for 53 percent of the variance in completion rates.

As an example, imagine a study where you will be asking an international sample of 100 mechanical engineers to view an ad that was published in a trade journal. Based on internal testing, the survey will take 10 minutes to complete. We are offering a \$100 Visa gift card in a random drawing. The invitations will mask who the client is but it will be obvious to respondents once they get to the ad.

Using the formula to predict the percentage we can expect to complete the survey once they've gotten through the screening questions, we have:

Completion rate =

- 1.017 (this is the constant)
- 0.024 x 1 (professionals receive a value of 1 vs. the 2 that consumers would receive)
- 0.009 x 3 (international studies receive a value of 3 vs. the 1 or 2 that local or national studies, respectively, would receive)
- + 0.090 x 0 (not offering IOP points)
- 0.077 x 1 (incentivizing via a drawing)
- + 0.040 x 0 (not giving out gift cards to everyone)
- 0.171 x 0 (not offering a copy of the results)
- 0.001 x 100/100 (giving out \$100 total, each respondent has a one in 100 chance of being selected)
- 0.035 x 0 (no Kano)
- 0.069 x 0 (no conjoint)
- + 0.005 x 1 (only showing the one ad that was published)
- 0.002 x 1 (we will ask respondents to estimate the percentage of the trade journal they actually read)
- 0.002 x 6 (one open-ended question about impressions of the ad and five asking respondents to list brands they think of the product)
- 0.029 x 0 (the identity of the client will become apparent by the end of the survey)
- 0.002 x 1 (we will ask a question that gauges how familiar they are with the client but it is a brand that we believe everyone will know)
- 4.675 x 10⁻⁰⁵ x 10 x 60 (it will take approximately 10 minutes to complete a survey and this variable is

	Unstandardized Beta	Standard Error
(Constant)	0.984	0.025
Incentive Was IOP Points	0.053	0.024
Incentive Was Drawing	-0.092	0.029
Incentive Was Report	-0.185	0.077
Incentive Value	-0.001	0.000
Survey Included Conjoint	-0.068	0.028
Number of Numeric Boxes	-0.003	0.001
Number of Open-ended Boxes	-0.003	0.001
Median Time to Complete	-5.436 × 10 ⁻⁰⁵	0.000
Completes Needed	-1.010 × 10 ⁻⁰⁴	0.000

Table 3: Beta Values – Simplified Model

in seconds)

- 9.029 × 10⁻⁰⁵ × 100 (we need 100 completes)

Doing the calculations, the estimated percentage of respondents who will complete the entire survey after getting through the survey questions is 84 percent.

Correlations

Although I had enough for my own purposes, I went further and picked apart the results, beginning with seeing what each variable contributed by itself. Table 2 contains the correlations between each variable and completion rate.

Most of these correlations made instant sense, but some required a little team discussion. For example, the finding that general consumers fill out surveys more readily than respondents who have specific professions was not new information. What was new was quantifying the effect.

Here are the effects I found:

- The more local respondents are, the more likely they are to either be our panelists or at least have knowledge of us, so they are more likely to complete our surveys.
- The Incentive Was IOP Points really was a stand-in variable for our own panelists, who are much more likely to complete surveys than the general population, even in our im-

mediate region.

- As previous research has already shown, drawings are not the best incentive.
- The negative correlations for Incentive Was Gift Card and Familiarity with Client were not immediately explainable but they also had such large p-values that they may as well have had zero correlations.
- Reports are, apparently, not good incentives. We had not investigated this and had used the incentive in situations where we were unable to offer other incentives for assorted reasons.
- The negative correlation between Incentive Value and Completion Rate initially was baffling but, after discussion, we agreed that it was caused by the fact that we intentionally assign higher incentives when we know that the sample goals will be more difficult to accomplish. If we are looking for professionals or non-American respondents or if we know that the survey is going to be more difficult or take longer to complete, we already expect to offer higher than usual incentives. Thus, this variable may be regarded more as a stand-in for difficulty as judged by our team.
- The negative correlations for Kano studies and conjoint studies were understandable, because both exercises can be time-consuming

or difficult to complete. The negative correlation for Number of Open-Ended Boxes was similarly understandable.

- The positive correlations for Number of Ads and Client Masking were not explainable but they also had such large p-values that they may as well have had zero correlations (the larger the p-value, the less likely there is any relationship at all).
- As expected, the longer it takes to complete a survey, the less likely respondents are to complete.
- The more respondents we need, the more likely we'll see people drop out of the survey. This may be another stand-in for difficulty, or perhaps source, because we typically need to use other sources besides our panel for the larger samples.

Simple model for forecasting

Going further into examining the variables, I used multiple methods to identify the simplest model that was not significantly poorer than the full model in its ability to predict completion rate (Table 3). The methods all agreed that the variables Incentive Was IOP Points, Incentive Was Drawing, Incentive Was Report, Incentive Value, Survey Included Conjoint, Number of Numeric Boxes, Number of Open-Ended Boxes, Median Time to Complete and Completes Needed together were most potent, accounting for 50 percent of the variance in completion rate.

With only four years' worth of results, I have been able to show the value of key variables. Most importantly, I can use my model to try out different scenarios and have data to back me up when I suggest adjustments. I will continue keeping track of these variables for each of our studies and see how accurate the model is over time, hoping to improve the precision. 📊

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Finding focus

Why clarity and effective communication are so important to MR

| By Susan Fader and John Boyd



snapshot

The authors propose the DISCOVER framework to help researchers ask the right questions to get the insights they need.

In a 1999 experiment, psychologists Daniel Simons and Christopher Chabris asked subjects to watch a video of a group of people passing a basketball back and forth and count how many passes occurred among members of the group wearing white. In the middle of the video, a person in a gorilla suit walks among the group, stands there for a moment and then walks off. When questioned later about what the video showed, most people do not remember seeing the gorilla.

How can they not see the gorilla that is directly in front of them? Well, it has to do with what you focus on. The viewers are told to focus on counting passes and, by necessity, their brains ignore other details of the situation, so they don't "see" the gorilla. Their focus impacts their perception of reality. The gorilla is real but the reality for most viewers does not include it.

So what does the gorilla have to do with fielding a research study, developing a marketing plan or even collaborating in a team meeting? In short, we need to start seeing our gorillas – the details we are missing that may be important to our work!

In the research world, we often assume that facts are static. However, if reality is based on perceptions, then reality is not static. It is always in flux and a person's reality is always changing. Even if our baseline assumptions about a particular dynamic are correct in one moment, things could change in an instant. Each momentary reality adjusts as each new piece of information is identified. Instead of facts alone determining reality, like the gorilla in the video, variable perceptions create reality.

In addition, as our environment changes, information degrades and disorder (or entropy) sets in. Entropy causes the environment to become confusing and encrypted. When we operate in an encrypted reality, we make suboptimal decisions. Therefore, our intention should be to continually work to decode the ever-changing environment so that we can make better decisions, design and conduct better research studies and achieve



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our team goals.

To help in that effort, in this article we will lay out an approach we call DISCOVER, which uses dialogue and effective communication with team members to improve the quality and impact of the information available to us and ensure that we are all working in the same shared reality.

Clarifying upfront assumptions

A common mistake that leads to mismatched realities is that historically not much time or effort is spent clarifying upfront assumptions and then challenging them for the best-possible outcome. We make unconfirmed assumptions (as an individual or team) based on our selective filtering of experiences. These assumptions establish a mental model of the world around us which we use to further filter out details we deem important and act accordingly. Unless we challenge our reality, we will act in a way that is potentially mismatched with the reality of the other party.

Take, for example, P&G's experience with Febreze. When P&G developed the product, it knew it had revolutionary technology that could chemically neutralize odors. So logically, the firm positioned it as an odor-eliminator and the marketing targeted consumers who lived in odorous surroundings, such as heavy smokers and pet owners. But sales were weak. Clearly the marketing team was missing something. Their basic assumption about the product (it was the best odor-killer available), which was true, was not resonating with their potential market. Why?

Desperate to save the product and improve sales, they decided to give Febreze to people and observe how they used it in their homes. P&G discovered that people were using Febreze differently from the way P&G thought they would. For these consumers Febreze was playing a very different role in their cleaning process. Users liked to ceremonially spray Febreze after they cleaned a room, made a bed or vacuumed a carpet to give the room that final touch and feel-good smell. The P&G team adjusted their reality,

changed their positioning to connect to that behavior and it eventually became a \$1 billion product.

The Febreze team knew what their reality was – what was true about their product. But that did not help them sell it. Their assumptions were mismatched with the marketplace. Once they clarified, through research, what the perception or reality of the marketplace was toward the product, they were able to succeed.

The Febreze team over-focused on one detail, the assumption that consumers who had heavy odor problems were actively looking to eliminate these odors. Until they challenged that reality and discovered that people with household odors may not find them annoying, they could not “see” the consumers' reasons for buying the product.

Here's another example of mismatched realities. A pharmaceutical client was trying to figure out why its implant contraceptive was not being prescribed by physicians and it made an incorrect baseline assumption that physicians were not prescribing the contraceptive in high numbers because the uniqueness and product benefits of this contraceptive were not being effectively communicated. The firm thought the solution was to develop and explore different messaging that focused on better ways of communicating the benefits of the contraceptive.

Based on this mismatched reality assumption, a multi-country research study with alternative messaging ideas was fielded which pointed to the most effective and motivating positioning. However, this positioning was not the direction that was needed, because the wrong basic assumption had led to pursuing the wrong focus.

During this research, a warm-up question on how the physician would describe this contraceptive to a prospective patient uncovered that it really wasn't a benefit-messaging problem but one where many physicians were not sure how or where to implant.

It turned out that, rather than a new benefit-messaging approach, clarification and training on how to insert was needed. If we hadn't

asked the physicians how they would convince a patient to use the contraceptive we would have just gotten feedback on which messaging was the most powerful, which would not have solved the prescribing problem.

Operates under a mental model

Everyone operates under a mental model of the world, our own reality. The trouble comes when we assume our perspectives are similar to others without any verification of them being true.

How do we get better at identifying these important and often relevant details as marketers and team members? It starts with understanding basic assumptions. All people, all groups make assumptions about the world around them and as researchers and marketers, we are no different.

This explains how people can see and experience the same events yet walk away with a different perception about what happened. We make selective observations and when we focus on certain details we miss other important details.

Doing a better job of matching perceptions with each group's or individual's reality is imperative both during the fielding of the research and in interpreting and using the research findings.

As studies have confirmed, the highest correlation to team effectiveness, measured by the team's ability to achieve its goals, is the free flow of information equally distributed among the members of the team. Said another way, healthy information flow increases team effectiveness for any group, both at work and at home, and the opposite causes dysfunction.

Not necessarily aligned

Dialogue is the key to healthy information flow. David Bohm, a well-known physicist who made several very significant discoveries in the field of quantum mechanics, was fascinated with how easily truth becomes obscured. He believed that most human interaction is incoherent, meaning our perceptions are not necessarily aligned, and his remedy for that is what he called dialogue.

In fact, he believed the subject was so important that he wrote a book about it called *On Dialogue*. He attributes

much of his most important scientific discoveries to his conversational collaboration with his peers in the field. In the book he argues that the best way for groups of people to become aligned amidst their differing perspectives is to have conversations about it so that reality can bubble to the top.

The word dialogue means meaning flowing through. Dia means through and logue comes from logos or meaning. Bohm felt that the more we can have consistent dialogue about how we perceive things, the more coherent and aligned our worlds become, and the more "truth emerges unannounced."

But how do we effectively have dialogue with our team members so that good, clean, truthful information is flowing through the system? The acronym DISCOVER can help us continually discover truth in a constantly changing environment.

- Destroy information barriers
- Invite feedback
- Seek out the data
- Challenge assumptions
- Observe the environment
- Verify understanding
- Emotional regulation
- Revise and redo

Destroy information barriers.

Anything that blocks the free flow of information will contribute to the dysfunction caused by mismatched reality. These barriers can be physical or cultural. In the case of Febreze, the researchers went into the homes to interview the consumers and they consistently had internal dialogue about their findings. With the contraception example, instead of doing a survey or making a phone call, in-person interviews provided visual body language cues that uncovered that the physicians did not know how to implant.

Invite feedback. People are naturally hesitant to offer feedback, especially if that feedback is intended for someone in a position of authority. There needs to be a constant assurance that feedback is not only welcomed but highly encouraged – especially the kind of feedback that is sometimes hard to hear. In the Febreze case, the research leader made it safe for his team members to assert their opinions. They weren't afraid to disagree and

this allowed vital information to flow through the group.

Seek out the data. Precious information is hiding in the corners and recesses of your teams. It's important to proactively seek it out through constant probing. Go right to the source and ask candid, relevant questions. Proactively find opportunities to have dialogue. Be accessible, ask your market and perform direct research to learn about what they really care about.

As an example, we worked on a recent research project in which the client wanted to better understand why heavy drinkers of its full-calorie carbonated beverage who also drank diet beverages were not drinking the diet version of its product. The client assumed it was because of dissatisfaction with taste and was about to launch an exploratory in alternative taste formulations. However, we did not base our research design on the assumption that taste was the turn-off, so we were able to find out that the reason for not drinking the diet version was completely different from what the company had assumed. One of the main appeals of the full-calorie drink was that it had caffeine. The main turn-off regarding the diet version was that many consumers incorrectly thought the caffeine had been taken out. They also let us know they liked the taste of the diet version but wished the caffeine had not been removed.

Challenge assumptions. Don't let your mental models allow you to make unchecked assumptions that could point you down the wrong path. An example of this can be found with market categorization and segmentation. It is very helpful to group consumers, products and line-extensions into different categories. But the way corporate clients might segment the category may be different from the way consumers do.

For another beverage client, one that tended to segment the many different offerings in its category by flavor and diet/non-diet, it was an eye-opener when heavy drinkers of its drink tended to segment the category by time of day and occasion. (For example, do I need a caffeine jolt or do I need some "me" time to relax while drinking the beverage?) It is very helpful to use a grouping exercise where you have

consumers group and name different segments within a category.

Observe the environment. First, we must be self-aware enough to realize that our baseline assumptions may be off due to our mental model or how we perceive the situation. Those who are not self-aware, humble and courageous enough to do the work of dialogue for truth-discovery are doomed to making bad decisions.

When you are self-aware enough to see that your market is shifting or acting in a way that you don't understand, or when your friend or family member's behavior changes in a way that concerns you, engage in the dialogue to realign your realities.

Verify understanding. Include an exercise that helps confirm that you are making the right assumptions. At the beginning of any research study quickly check to make sure the corporate and research assumptions align with how the consumer is seeing the world. Verify everything, even down to words and phrases. One common misstep is when generic terms can mean different things to the corporate client and the consumer.

Good communication is quite difficult and without constant vigilance, words and phrases fly by and both parties involved in the interaction are disconnected from each other's intent. It's good to stop for ambiguous words and clarify meaning.

We do a lot of work in the financial services industry. Even though financial services is a term that most of us hear and use frequently, the majority of consumers in our research studies use an incomplete definition. Most only think that term refers to banking services and forget to include insurance products.

So if you don't make sure everyone is defining the term the same way, you end up with major differences in what you think you are talking about. So how do we clarify? At the beginning of a study ask everyone to write down their definition of the term and then ask what they wrote. If it's different from the definition that needs to be used, then clarify, e.g., "For this conversation we are defining financial services as including both banking and insurance services."

It's also helpful to say things back to make sure you're receiving the message correctly. "When you say _____, what do you mean by that?"

Emotional regulation. Emotions are what make us human; they can be your best friend and your worst enemy. How often during a conversation do we let our emotions lead us to stop listening and to lash out, causing others to shut down and suppress their true thoughts and feelings? When we let anger, envy, frustration and ego dictate our behavior, our information degrades. By the same token, when we become overly optimistic and lose touch with reality, we can get what a colleague used to call "happy ears," where we project an outcome based on what we really want instead of what is actually likely to happen.


This is where the step of observing your environment can help. If we are self-aware and we start to notice that our emotions are clouding our decision-making, we can make a real-time adjustment and regulate the emotion so that we absorb truthful information.

Revise and redo. The previous DISCOVER elements relate to gathering the best-possible information in a constantly changing environment. This last step allows you to use the precious information gleaned from making adjustments and apply the learnings to your environment. In this way you can test the new information

to see if it gives you better results and then the cycle starts over again where you reapply DISCOVER to decode this modified environment.

This produces a learning cycle of sorts, where if you are continually applying the steps in the midst of change, you are more likely to allow truth to emerge, giving you the cleanest possible information with which to make more optimal decisions. This actually increases the collective IQ of teams and enhances the ability to reach team objectives.

A perpetual learning system

In our fast-paced world, uncertainty, disorder and differing mental models can degrade the quality of information and hamper team effectiveness and goal-attainment. But if teams can keep information flowing by using tactics such as those found in the elements of DISCOVER, they will become a perpetual learning system in the midst of change and operate with the best-possible data, increasing their effectiveness and more efficiently achieving goals. 

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snapshot

Can financial services companies build emotional connections in a world of increasingly virtual relationships? They need to if they want to keep and gain customers.

●●● financial services research

A satisfying transaction

Why financial services firms must forge connections in a virtual world

| By Tony Smith

Anyone who's used a dating app will tell you that virtual dating isn't the same thing as meeting someone in person. Sure, you can build an emotional bond of some sort but if that online connection doesn't translate into the real world, the relationship is over before it begins. Anyone who's used a dating app will also tell you that apps have forever altered the experience of dating.

In the same way, the world of banking and financial services has changed dramatically in recent years. There was a time, not long ago, when interactions with a bank were largely face-to-face. The first disruption was call centers that gave us a convenient alternative, allowing us to do many things outside of branch hours. We could verify account balances, transfer money, pay bills or even discuss available home-financing options while still interacting with humans. We didn't even need to venture outside of the house. The next disruptions came in the form of online banking, price-comparison sites, mobile apps to manage our accounts, digital wallets, robo-advice



and live chat – all services that offer convenience for consumers.

And as consumers have adopted technology in their everyday lives for everything they do, non-traditional financial services players (fintechs and insurtechs) have developed and now play a key role in meeting consumer financial needs particularly in payments and in the insurance and investment arena. Legislation will have an impact, too. The PSD2 directive in the EU looks set to be the next Uber moment in the financial landscape. While this impacts EU nations right now, it is being closely watched by banks and other financial providers around the globe. It will expand opportunities for banks and fintechs alike and will spawn ever more new technology-driven business models with great potential customer appeal.

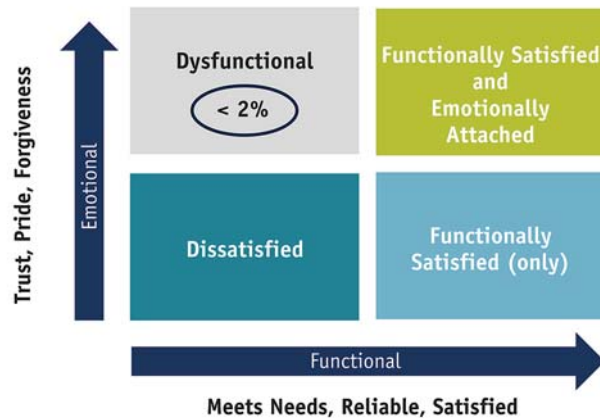
PSD2 will mean that banks must grant third-party providers access to a customer's online account/payment services data with the customer's permission. The bank will no longer "own" the customer's data and companies will be able to use that data to potentially provide better products and services. E-commerce sites such as Amazon could become the payments processor rather than MasterCard, Visa or PayPal.

Set to continue

Digital disruption in financial services looks set to continue and banks should be concerned that increasingly in banking, unlike in dating, the relationship doesn't necessarily have to transfer to in-person!

It is not all doom and gloom for banks though. Research from Bain in 2016 showed that growth in mobile banking is leveling off in many countries and actually declined in 2016 in China. At the same time the decline in the use of call centers and bank branches is slowing. There's still a need for branches, despite the seemingly never-ending march to closure in some parts of the world. Indeed, Bain's findings showed that around 40 percent of people who had experienced a branch closure took their business elsewhere. The implications of this are obvious – not everyone wants digital for everything or, if they do, perhaps it doesn't fulfill their needs and expectations sufficiently yet. Banks still need to develop the omnichannel approach for customers and understand the requirements and perceived limitations of the various channels for different needs.

Figure 1: Creating a functional/emotional framework



Whatever the case, the pace of digital change will continue and relationships will become more and more remote. Human interaction, long seen as the opportunity to create an emotional connection with the customer, will continue to decline. So too will the chance to provide exemplary customer service.

Build an emotional connection

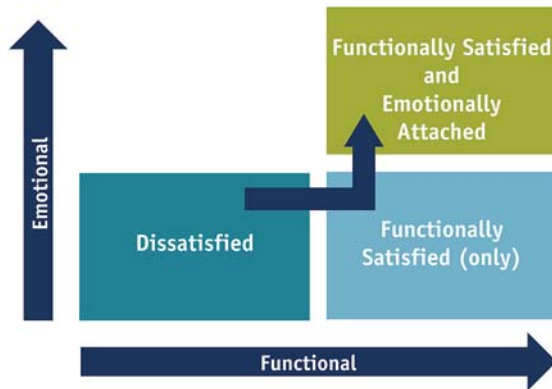
Ipsos research shows that it is important to understand how to build or maintain this emotional connection. Why? Because you only reap the benefits when you do!

Our study among 8,000 consumers in the U.K., U.S. and France looked at banking, auto and mobile network providers. The research helps provide a framework for understanding the importance of building an emotional connection (meeting emotional needs) over and above meeting a customer's functional needs.

It's worth understanding the differences between meeting emotional needs and meeting functional needs and how we distinguish between the two in our research (Figure 1). Functional needs are those aspects of the experience that are included in many customer experience evaluations: ratings on aspects such as speed, accuracy, competence and content. These are tangible aspects of the service or experience. Emotional aspects reflect a connection with the supplier, including rating a company on dimensions such as "how close do you feel toward [brand]," to what extent you'd be "willing to forgive [brand] if it made a mistake," "feeling a sense of pride for being a customer of [brand]," "I would trust [brand] to do the right thing." Each of these implies a sense of emotional connection with the brand.

The first point to make is that very few (less than 2

Figure 2: Creating a functional/emotional framework

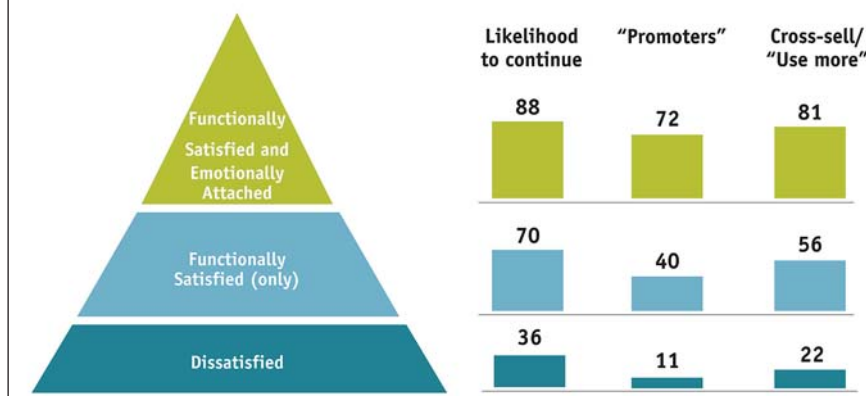


tional connection with the customer that you get the step-change business outcomes that many organizations strive to achieve.

If a customer is both functionally satisfied and emotionally connected to the brand:

- They are over 50 percent more likely to stay with the brand in the future than if they were simply functionally satisfied.
- They are almost three times more likely to recommend your brand.
- Their likelihood to consider your brand for their next product/service when the time comes more than doubles than if they were simply functionally satisfied.

Figure 3: Emotions really do matter...



But how do we build emotional connections in largely functional relationships when these functional relationships are becoming more remote due to the adoption of digital channels?

Undermine or build

What kinds of things have you done that might make a customer dissatisfied? Or delighted? It tends to be these memorably bad or good moments that either undermine functional satisfaction or build emotional connection – Web sites being down, confusing offerings, long wait times for customer service, lack of response, inexplicable payment rejection, etc. Conversely, emotional attachment can be nurtured through responsive and proactive customer service; exceptional handling of issues; going out of your way to help; well-designed user interfaces and user experiences and products that do what they say they will and deliver on promises of speed and convenience. Identifying which “memorably good” moments of service or “memorably bad” moments have the greatest impact on your customers is critical to understanding what action you need to take.

Critical incidents make or break loyalty. In human relationships, maximizing these events is increasingly the difference between a happy experience for one customer that might be shared among family and friends and a viral video or Yelp rant

percent) people rated their brands highly in meeting emotional needs while also rating them low on fulfilling the functional aspects. This makes intuitive sense – if a brand doesn’t do the basics consistently and reliably and if a customer rates them poorly in terms of overall satisfaction, it is unlikely that the customer will have an emotional connection with the brand.

What this then gives us is a continuum. At one end are customers for whom neither functional nor emotional needs are met. Further along are those who are functionally satisfied but not emotionally connected to the brand. Finally, there are those customers who are both functionally satisfied and feel attached to the brand (Figure 2).

Importantly, for a brand to make an emotional connection, it must meet a customer’s basic needs. Customers will only be proud to use your brand and trust you (to do the

right thing for them) if you get the basics right for them consistently. In today’s world of constant and sometimes-viral feedback, it’s also important to know that they will also be more likely to forgive you if something goes wrong.

It could be argued that, if the key aspect of a relationship is getting things consistently right, that should be the business’s focus. Let’s look at the checking account customer of a bank. If you process their payments on time, don’t overcharge, don’t make mistakes and make it easy for them to transact, then that customer will continue to be a customer. There is a strong likelihood that they will remain a customer in the future if they are functionally fulfilled, unless something changes or entices them away. After all, few people actually switch banks in any one year.

But – and this is a big but – as the schematic in Figure 3 shows, it is only when you establish an emo-

that might be spread among thousands of potential customers. Having systems in place to address and respond to customer issues can help staff foster the loyalty-forging moments they'll remember. Technology can be an asset to monitor and manage continuous customer feedback and resolve critical incidents.

In virtual relationships, many of these issues come up as well. But in these relationships the customer is left to sort it out himself. Understanding how to optimize the omnichannel experience for the virtual customer, via the use of chatbots and other digital help for example, is critical. Yet that warm customer voice or handshake may be necessary to make the experience work. That's especially true for the customer who has spent several minutes doing a seemingly simple task only to hit a brick wall!

In short, make it easy. Functional, fast apps with great interfaces will help forge that connection if they allow customers to accomplish what they want with minimal disruptions.

Uber's most-basic "disruption" was nothing more complicated than a straightforward app. Allowing customers to hail a ride when they wanted it rather than standing out in the cold and rain with their arm raised hoping an unoccupied cab drove by was a game changer in an otherwise tech-free industry. The taxi industry could have maintained its established dominance if it had moved at the right time to create a product that would appeal to a new generation of customers. In the absence of leadership from the established brands, a start-up was able to move in and create new space. This is happening and could continue to happen to banking and financial services, too.

Well-positioned

That said, the existing players are well-positioned to head that off if they act. They already have longstanding and loyal relationships with customers as well as trust. They have a trove of customer data which can be used to make suggestions and train AI apps to

help the customer. They are already doing so through simple things such as proactive alerts about balances or rates and by filling in fields with existing data rather than making customers fill them in again and again. As the technical and legal climate changes, as we are seeing with PSD2 in the EU, competition will increase in the digital financial world. Traditional players need to take every opportunity to work with the customer in his technological world to make the virtual vs. human interface as personable as desired so that both parties win. It is more important than ever to think through ways to maintain and manage the functional and emotional connection of the virtual world with the real-world consumer. 

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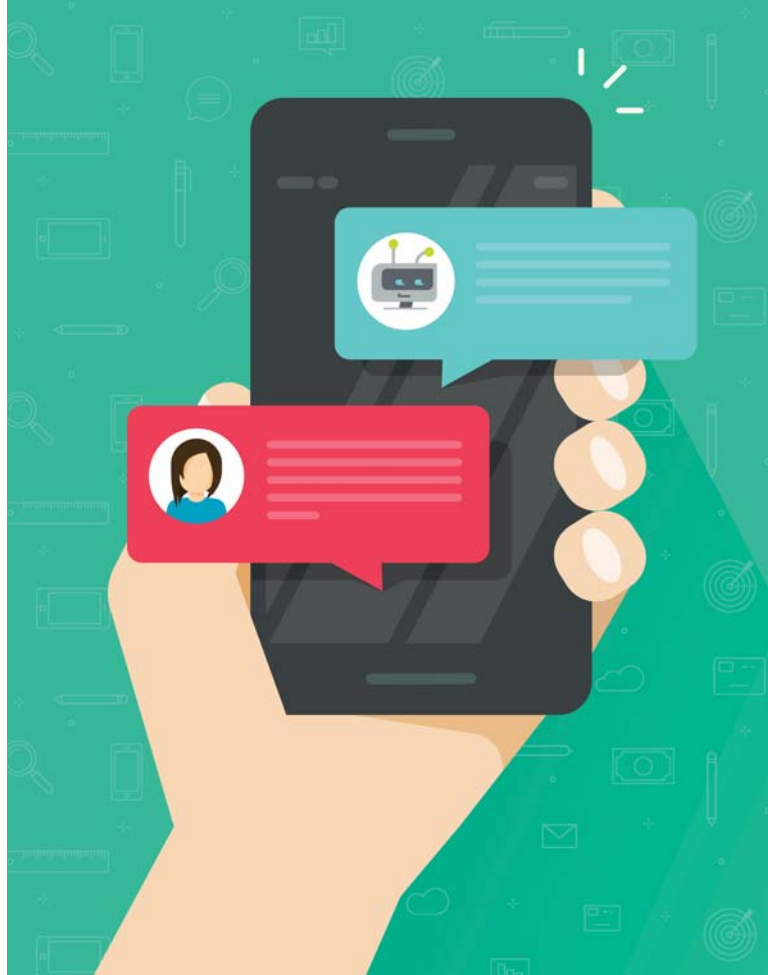
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●●● financial services research

Talking back to the bots

Defining the UX of AI in FS

| By Keith Bossey and Gavin Lew



snapshot

The authors examine an approach for assessing the impact of self-service touchpoints such as chatbots on consumers' interactions with financial services firms.

In industries across the business spectrum, amping up customer service with digital technology is not just an option, it's an imperative. Apps, mobile-friendly Web sites and artificial intelligence (AI) programs promise huge savings for companies of all kinds, as well as increased convenience for customers in need of help.

But this digital win-win can only be realized when consumer-facing businesses implement change carefully and monitor closely.

The financial services industry is facing this dilemma head-on. On the one hand, providing truly personalized customer service to millions of consumers – some of whom may have very little money to save or invest – is simply not feasible. But increasing the industry's use of non-human service reps poses big risks for banks and investment firms, who traffic in the one thing people tend to worry about most: their money.

Let's face it: Banks are not noted for managing customer relationships or public relations well. Unexpected fees and charges, changing terms and conditions, plus a financial meltdown or two – the individual customer has little reason to think highly of Mr. Big Bank.

In this difficult climate, data holds multiple promises for banks and other financial institutions. With access to a host of information on any one consumer, or segment, financial services (FS) companies should be able to increase personalization through adept use of AI and other digital services. Recent GfK research shows that, while roughly 85 percent of consumers want their banks to give them financial tips, only about 30 percent are actually getting that service.

If AI can deliver these kinds of much-needed benefits well, then banks can save money and boost customer satisfaction – a huge win-win. But the drive toward innovation needs to be accompanied by a willingness to measure often and respond nimbly to problems as they arise.



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Simulates human conversation

One very prominent and growing example of digital personalization (and efficiency) in FS is the chatbot, a computer program that simulates human conversation. Using artificial intelligence, the application can answer simple questions and gather information, all the while limiting the need for the intervention of a real person. If you have ever “spoken” to someone while interacting with your bank’s Web site or app, that probably was a chatbot – or involved a chatbot “enhancement” to a human interaction.

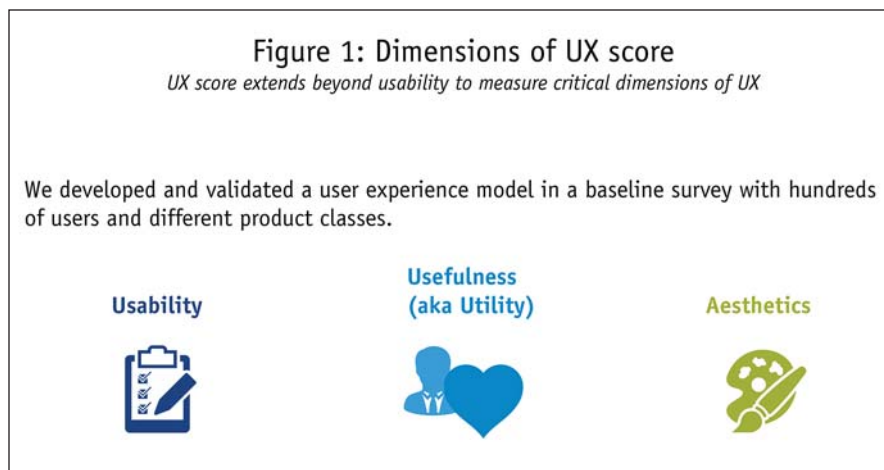
A recent GfK survey found that roughly 18 percent of the U.S. population say they have interacted with a chatbot at least once – and the reports are not always positive. Among the highest-value customers (with incomes of \$200,000 a year or more), incidents of negative chatbot experiences were twice as common as positive ones. Fully 15 percent of this important consumer segment said they had walked away unhappy after using a chatbot, while just 7 percent were satisfied with the exchange.

These high-income consumers tend to be among the most open to – and anxious for – digital enhancements for managing their money and investments. One-third (34 percent) say that it is more important for a bank to have good online services and/or a high-quality mobile app than it is to have helpful staff in the local branch or office; this compares to 29 percent in the general population and 27 percent among those earning under \$100,000 annually.

But the biggest earners and investors are also more likely to say that their financial needs are “too complex” to be met by a mere interface. An inescapable fact for banks is that roughly two-thirds of all consumers, and almost three-quarters of high-asset investors (investable assets over \$500,000), say it is still very or extremely important for banks and other financial firms to have a real person whom customers can speak to when they have problems.

Find the right mix

The challenge for banks and other institutions, then, is to find just the



right mix of human presence and digital efficiency. We know that 24/7 service and paying less for human advisors are appealing benefits for bank customers yet they also want to feel confident they will be able to “speak to someone” when the need arises.

The answer, as you might have guessed, is consistent, finely-attuned feedback. Chatbots represent a core customer experience issue, one that directly affects satisfaction and, potentially, loyalty. While studies show that customers tend to be reluctant to switch banks, it is also true that money has never been more portable.

When we think about ways to measure and improve upon chatbot experiences, traditional surveys may be the first things that spring to mind – because marketing researchers have been relying on them for so long. And it is true that a traditional survey sent out immediately after a chatbot interaction could capture some overall impressions and feelings about the exchange. We might ask: “Was the experience satisfactory?” “Did you get what you needed?”

The true source of satisfaction with chatbots, though, is in the dialogue itself. Did the interface remind you repeatedly that it is not human – or was the difference barely apparent? To design a great chatbot experience is essentially to engineer a conversation – and that is much more difficult than one might guess. In a recent study¹, French train service Voyages-sncf.com sought to create a chatbot that would help travelers buy tickets and get information – essentially providing the same interactions that a human ticketing agent would.

But the train company quickly

learned that basing its bot’s actual word choices and dialogue strategy on the conversations people have with flesh-and-blood ticket sellers was a huge mistake. Without the context of the train station, the waiting line, eye contact, physical gestures and a host of other factors, the digital interactions were completely different. For example, you would never get to the front of a ticketing line and say, “I’m here to buy train tickets” but you might well start a chatbot conversation that way.

This and thousands of other examples of dialogue and interaction show the promise of a user experience (UX) approach to evaluating and improving chatbots. UX is an artful science, capturing and making sense of all the feelings, ideas, preferences, perceptions and responses that accompany the use of anything. Usually achieved through one-on-one observation, UX has been applied countless times to people’s interactions with Web sites, medical devices, automobile systems – pretty much anything you can think of.

But an ongoing challenge for UX is scalability. Focusing on the interactions of 10 or 20 customers with a bank’s app, Web site or bot will be revealing; but it cannot truly diagnose whether problems are widespread or fairly limited. Financial institutions with millions of customers worldwide need solutions that can reliably detect not just individual reactions but also the scope and magnitude of specific issues. They also need a compact way to get at the brand value aspects of user interactions – answering not just “Did the system work?” but also “How did the interaction make you

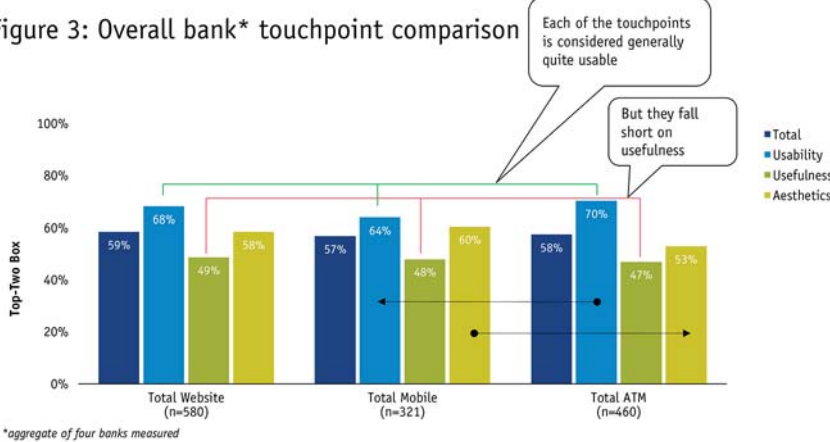
Figure 2: Users rate bank* touchpoints

Paradox: Touchpoints are providing what people need but lack new and interesting features

	Total Website % M	Total Mobile % N	Total ATM % O	
Has exactly the features I need.	68 ^N	59	69 ^N	👍
Has interesting new features.	35	37	33	👎

*aggregate of four banks measured

Figure 3: Overall bank* touchpoint comparison



*aggregate of four banks measured

feel?"

One scalable user experience measurement model, first defined and validated by GfK in 2014², is UX Score. Through a series of 10 questions, UX Score captures three dimensions of user experience – usability (task-oriented qualities), usefulness (self-oriented) and aesthetics (Figure 1).

In tests, UX Score proved to be a solid predictor of Net Promoter Score (NPS), purchase intention and market share. Scores can also be compared to competitors in the same category to understand strengths, weaknesses and opportunities for gaining advantage.

In September 2015, GfK applied the UX Score model to studying customers' interactions on three platforms – ATM, mobile app and PC-based online – with four major banks. By developing a clear picture of successful experiences and less-than-satisfying ones, the research could help banks understand where to spend crucial resources to improve customers' feelings about their brands.

Using a nationally representative sample, the study found that roughly

two-thirds of respondents overall felt the different touchpoints had "exactly the features" they were looking for – with mobile apps scoring slightly lower than ATMs and PC-based Web sites (see Figure 2). But only one-third said that the touchpoints had "interesting new features," with mobile apps scoring slightly higher here.

Across all four banks, the three types of touchpoints scored well on usability but fell short on engagement (see Figure 3).

Four imperatives

Where do we go from here? It is clear that self-service touchpoints, powered by AI, are here to stay – and the proportion of interactions that rely on these digital channels will only continue to grow. Financial firms will therefore have four imperatives where a quantitative UX approach can be valuable:

Innovation: As products and services become digital experiences, traditional approaches used to measure concepts and identify improvements will become increasingly irrelevant. Actual user testing (qualitative) and

UX Score measurement (quantitative) can have more immediate impact.

Customer experience tracking:

While measures such as NPS will continue to be used for many channel interactions, and to understand customer experience at the relationship level, it will be more insightful to have quantitative measures integrated into tracking programs or have distinct tracking mechanisms for digital touchpoints.

Customer experience improvements:

Deep dives into outages at these digital touchpoints can be assisted by the use of approaches such as UX Score as a pre/post measure, in both qualitative settings and larger-scale quantitative initiatives.

Competitive assessment:

In industries such as financial services, where differences in product features and benefits are often small, the experience of delivering services becomes the brand differentiator. UX represents the delivery on the brand promise and assessing its success allows financial firms to look for areas of personal vulnerability or strength as well as opportunities to steal share from competitors.

In line with expectations

As companies rush to digital and AI as sources of personalization and efficiency, it is imperative that customers' experiences are in line with expectations – usable, useful and aesthetically appealing. An innovative UX approach to this need can be both cost-effective and truly actionable if implemented with care and wisdom. 🗣️

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●●● shopper insights

The power of the smoosh

Uncovering insights from what consumers say and what you see

| By Julia Eisenberg



snapshot

A look at how to incorporate more visual elements into your consumer research.

What do we lose when we rely only on what others tell us? Often, we lose nothing. Words can be illuminating. I've made it my life's work to listen to what clients, consumers and colleagues tell me. Sometimes words are pure poetry, like the German word *waldeinsamkeit*, which describes the feeling of being alone in the woods. Or *tartle*, the Scottish word for the panic or hesitation felt just before introducing someone whose name you can't remember. And while I've never had a respondent liken an experience, product or service to solitude among the pines, the power and insight contained in what they tell me never ceases to amaze.

Although we learn so much from the words our consumers share, an entirely new dimension of the consumer experience is unlocked when we go past words shared with us in a focus group, in an online discussion or in a survey and find ways to directly observe the consumer experience with our own eyes and ears. I'm certainly not here to make a case against listening to and acting upon what consumers tell us through text-based and discussion-based research. Perhaps a better question is not what do we lose with words alone but what do we gain when we use technology to both hear and see what people think, feel and experience?

Feel closer to the story

There's a reason kids love show-and-tell day at school and a reason we read our children stories from illustrated books instead of reading lists of facts off a legal pad at bedtime. There is sometimes no substitute for being able to see something as it is described. I recently listened to a podcast that should win awards for its vivid and visceral descriptions, yet as soon as I could, I found myself searching for pictures of the people and places discussed. Why? The images made me feel closer to the story and like I had a better and clearer understanding of that world as I continued listening.



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For researchers, visual cues can eliminate assumptions about what someone might mean. Imagine reading about a makeup routine or hearing someone describe how to execute a favorite recipe. How do we truly know what someone means when they say "...now smoosh the concealer under the eyes – pat, pat, pat..." or "The meat should feel firm but springy when it's done..." How exactly does one "smoosh?" How "springy" is springy enough? These descriptions and definitions are immeasurably enhanced by witnessing the process.

I once fielded a project where participants were asked to try a new personal care product. Almost everyone in the very large study told us how much they liked the product throughout the text-based assignments. Based on what they'd written, this prototype was a slam dunk across the board. But in addition to written journals and assignments, we also asked respondents to capture video of the very first moment they tried using the prototype. This was an edible product and much to our surprise nearly everyone looked like they'd bit into a lemon on that first try. It was a very brief, fleeting moment we only saw in the first product trial but it became a strong anchor point as we observed usage over the course of the study.

As the trial period continued, few ever mentioned or even remembered that initial "zing" in their written journals. Only the first trial elicited the wide-eyed surprise we saw again and again on video. Subsequent use videos were missing that funny face because participants knew what to expect and moved on. Without see-

ing this short but critical first try, we would have lost major insight from that small moment and would not have probed as hard as we did to figure out exactly what caused the grimaces. Ultimately, the strength of the flavoring and the texture were addressed, both in the formula and the marketing.

I often think back to this example as my team and I scope research. I've always known how powerful the combination of reported behavior and direct observation can be but this study made me extra sensitive to it. I am on a constant search for the electricity these moments create because they add sparks both when we design and when they emerge in analysis.

Almost too many choices

These days it is nearly effortless to integrate video, photos, memes, gifs and more into both daily life and consumer research. It's simple and powerful, so why don't we do it more often? The truth? Despite all the technical advances, it can still be daunting to figure out how and when and why to use this technology to the fullest. We have the tools at our disposal but we almost have too many choices and too uncertain a path to success. How do we get maximum research impact and successfully blend the way respondents show us and tell us what they think and do? Instead of starting by laying out all the possible combinations each tool in our toolkit can deliver, we find greater success starting with the core, fundamental insight need and working backwards to land on the critical path to success.

Here are some examples of how to

get maximum impact out of technology for objective-based qualitative research. Many of these solutions can have a place paired with quantitative work too but for simplicity's sake we'll stick to qual in this article. The business need is always what I consider first when scoping a multidimensional approach. From there, I evaluate the merits of all the technology and tools at my disposal. Some are best suited for deep, strategic dives, while others lend themselves to broad but simple glimpses. It's this ability to tailor the approach to the research that provides great freedom in design and yields authenticity in results.

Need: A complete view of the consumer's life, habits, routines.

When we need to understand a day in the life of a customer, or the specific laundry routines of your segments, or exactly how moms and kids snack at home and on the go, we need a way to see and hear what they do. Here, the most impactful approach is a video ethnography (in-home, in-store or both) and a multi-day bulletin board with text and photo assignments. Respondents record daily or recurring activities and answer video- or text-based questions over the course of several days or weeks. Participants may create collages or mood boards to convey certain thoughts and emotions. Once complete, we have an in-depth understanding of our consumer backed by not only their words but also video clips and visual cues, a much richer data set.

Need: Test a new product or prototype. When we have a new product or prototype to test with a specific

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audience, I'd choose a video ethnography paired with live text conversations. In this construct, respondents record video of themselves interacting with the product – first look, first impression and recurring usage in their home or elsewhere. Then, individuals participate in a one-on-one moderated conversation to round out thoughts, feelings and experiences with the product. This provides a robust view of a product's strengths, weaknesses and opportunities for improvements. These insights come to life from the combination of text and video so we can make smart adjustments and go to market with confidence.


Need: Bring customer segments to life. If you're the proud owner of a consumer-segmentation or -typing tool, congratulations! It is hard work to define and describe consumer segments. But what happens when the numbers and typing don't tell us enough about these customers? Or what if the tool has aged a bit and we want to be sure the target profile hasn't moved in the marketplace? I always love putting real faces and voices to segments because it helps teams and executives feel personally connected to what can become large, abstract consumer groups. Here, a bulletin board and live video interview is just the ticket. Respondents answer qualitative questions in a multi-day board to flesh out segmentation learnings from the quantitative instrument. Informed by findings from the board, moderators then conduct live one-on-one video interviews to give a true voice to each segment. The result? A curated source of consumer highlights and personal touchstones to illuminate key segments.

Need: Capture the voice of the consumer to bolster a pitch or executive-level presentation. Sometimes we need answers from many and soundbites from a few. I see this a lot when we're in the early stages of ideation or pitching new concepts to internal or external partners. For this need, a live one-on-one text exchange provides a solid body of answers to key questions and one to two straightforward video answers embedded in the exchange bring it to life. Here, it's possible to gather short clips from all or just the "rock stars"

to help put emphasis on key findings. The outcome is solid, poised findings and some dazzling presentation clips to seal the deal.

Access to something amazing

Heard it all before? I know I have. It sounds great but can we apply compound approaches without complex logistics derailing everything and pushing timelines into purgatory? I'm here to assure you it can be done. It can! Because when we let the business need dictate the multidimensional approach (and not the other way around), we get direct, immediate access to the magic of seeing and hearing from those who matter most to our business. When consumers show us a routine, laugh through a recipe, gesture wildly as they tell us about something they love or hate, we get access to something amazing: authenticity – a rare commodity and something technology is helping us capture in a way that is comfortable for consumers and efficient for researchers. These authentic insights are well-rounded and more complete than a single-phased approach, enabling you to act with greater confidence.

The great news? The technology powering video, photo and interactive research tools gets better every day. Price and time constraints matter less and less. You don't have to trade quality for speed or settle for a low price but mediocre outcome. If you're happy with the way you do research without these tools today, I'm glad. It means you're great at what you do and your business is benefitting from your expertise. But if you haven't explored more multidimensional approaches that offer the power of show-and-tell – why not? What might you lose in the space between what people say they do and what they actually do? If you think about it, you have nothing to lose but that empty, grey space. Trade that empty space for authenticity, depth and richer consumer truths. Let the research show and tell your business how much untapped potential lies ahead. 

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●●● shopper insights

Minor change, dramatic impact

How small 'nudges' can have a big effect on shoppers

| By Scott Young



snapshot

Scott Young explores applying behavioral economics to influence shoppers' behavior.

Behavioral economics questions the underlying premise that people are inherently rational decision-makers. Based on research by Nobel Prize winners Robert Shiller and Daniel Kahneman, it states that our decisions are largely driven by range of factors (such as impulses, habits and social norms) that operate beneath our consciousness. And, to paraphrase author Dan Ariely, these non-rational forces are both consistent and predictable, which suggests that they can be studied, understood and leveraged.

Behavioral economics is now having a major influence on both marketing and insights. Increasingly, marketers and agencies are focused on System 1 communication, while research agencies are integrating non-conscious measurement (via neuro, facial coding, implicit measures, etc.) within their studies. At our firm, we're focused on taking behavioral economics a step further, by applying its principles to actively influence consumer habits and shopper decisions. In this article, we'll introduce the concept of "nudge marketing" and share some of what we've learned so far.

So, what is a nudge? A nudge is defined as an "effective little help" that leads people to adopt a desired behavior either consciously or subconsciously.

This concept was first popularized by Richard Thaler and Cass Sunstein in their book *Nudge: Improving Decisions About Health, Wealth and Happiness*. As the title implies, their primary focus was on public policy – and how behavioral economics principles could be applied to nudge people toward making better choices.

Their fundamental idea was that people can be encouraged ("nudged") to act in a certain manner by leveraging subconscious drivers (such as salience, social norms and framing) or by simply making a desired behavior easier than an alternative path. For example, we've consistently seen that forcing people to opt out (of, say, organ donation or charitable donations) leads to dramatically higher rates of participation than forcing



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them to opt in.

Clearly, these forces also apply at the first moment of truth (FMOT), when people are making purchase decisions.

- In one well-known study, the addition of a small sign (“No more than 12 cans per customer”) actually doubled shoppers’ average quantity of soup purchases, by effectively anchoring their decision process.
- In another case, employing reciprocity (by changing the structure of a frequent user rewards program) increased the program enrollment by over 80 percent.
- Time and again, we find that how choices are framed impacts purchase decisions. When shown product lines, shoppers consistently gravitate towards middle options (medium sizes, the second highest-priced item, etc.).

None of these cases involved actively persuading, convincing or changing people’s beliefs. Instead, they centered on seemingly minor changes that had a dramatic impact on shoppers’ decisions.

Two frameworks

In his book, *Nudge Marketing: Winning at Behavioral Change*, Eric Singler of PRS IN VIVO introduced two frameworks:

The Drivers of Influence: The drivers are a distillation of approximately 20 of the most powerful and prevalent behavioral economics forces acting upon human decision-making, including relatively familiar concepts (such as framing, loss aversion and reciprocity). Collectively, these drivers provide a foundation for analyzing and influencing behavior.

The NudgeLab Process: NudgeLab is a four-step process for identifying and executing nudge opportunities, rooted in a behavioral economics-driven approach to ethnography and ideation. This process won several ESOMAR awards (upon its introduction and piloting in 2014) and has been applied across over 50 nudge initiatives.

Over the past three years, Singler and our “Nudge Unit” have worked with marketers across a variety of industries. Recent initiatives have in-

cluded: nudging to facilitate purchase and adoption of a new form of pest control (in India); nudging shampoo buyers in the Philippines to also purchase conditioner (“system” purchasing); nudging to promote new usage occasions for a familiar food product (in France); and nudging buyers of dry dog food in the U.S. to also visit and shop from the wet food aisle

Through these experiences, we’ve learned a great deal about applying behavioral economics principles in a marketing context. In particular, we can share three underlying principles, which are critical to using nudge successfully:

Nudge is a complement to (not a replacement for) traditional marketing. While some people speak of behavioral science as the opposite of traditional economics, it is best viewed as an additional dimension. Similarly, nudge is not a replacement for traditional marketing. Certainly, there’s a need to create the desire, by speaking to shoppers’ aspirations and conveying product features and benefits. In fact, we’ve found that it is nearly impossible to nudge people towards actions that they don’t want to take. Therefore, marketing is needed to persuade – and then nudge can be valuable in facilitating the follow-through (helping people to take action).

Nudge is about creating positive “habits.” An important underlying truth of behavioral economics is that many human behaviors are a function of our ingrained habits. These daily habits serve as triggers to certain activities, while simultaneously creating micro-barriers to adopting new behaviors. For example, many of us truly want to eat healthier. But our ingrained habits (such as picking up fast food on the way home or buying a candy bar from the checkout line) often overcome our desired behavior, resulting in low compliance.

In our experience, the true strength of nudge lies in applying drivers of influence to help overcome inertia and establish new habits. For example, in several recent cases, we’ve helped companies develop habit loops (cycles of cue/routine/reward) to reinforce desired behaviors.

Given that nudges often work in

this manner, we’ve found that they are best-suited to impact category-level behavior – such as adopting a new product form or driving incremental purchases – rather than driving brand preference. To put it another way, a nudge may encourage someone to cook at home – or perhaps to visit a store aisle – but marketing is needed to drive them to your brand of spaghetti sauce.

Nudging for good. Consistently, we’ve found that the best nudge opportunities come at the intersection of what’s good for both companies and individuals. In other words, they promote healthy or desirable behaviors that are also financially beneficial for marketers. And these intersections are actually quite common, as we’ve seen successful cases of: nudging people to drink more water (via packaging with built-in reminder systems); and nudging to encourage positive personal health behaviors, including more frequent handwashing and tooth-brushing.

Interestingly, we’ve also found win-win opportunities in less obvious situations: For example, portion control (for snacks, candies, beverages, etc.) is potentially desirable for consumers and more profitable for marketers.

Certainly, nudge techniques can also be used to promote excess consumption – and perhaps towards purchases that are beyond their means. But as noted above, these tools are most effective when supporting behaviors that people want to do; tricking people into misguided purchases is neither ethical nor in the long-term interest of most companies.

Three emerging opportunities

Clearly, we are still only beginning our efforts to apply behavioral economics to shopper marketing. However, based on our learning to date, we see three emerging opportunities to nudge fundamental behavioral changes.

1. Nudging shoppers in the store.

First and foremost, we know that there is a significant opportunity to apply behavioral economics thinking to develop more effective packaging, pricing and shop-

per marketing. For example, we recently conducted a nudge initiative in Thailand to help a company reassure (and retain) its loyal users in the midst of major packaging change.

Beyond these more tactical applications, we also see an opportunity to apply a new lens to address two key challenges common to nearly all retailers: driving cross-purchasing (within product categories) and nudging shoppers to visit additional store aisles.

2. Nudging digital adoption. As a society, we are in the midst of a massive transition from physical to digital across nearly all areas of our lives. And in many ways, the digital transition is ideally-suited for nudge approaches: it provides benefits (of convenience, cost, etc.) for both consumers and marketers and it is a transition that many people want to make, yet some are held back by inertia and their ingrained habits.

Thus, we've been working with companies to help customers create new habits in the digital realm such


as promoting Web-based shopping for financial services (as opposed to working through a broker or insurance agent). In a recent initiative, we identified opportunities to apply behavioral economics levers to influence duty-free shoppers, both at the planning stage (via social media) and within airports (during the shopping experience).

3. Educating marketers. Finally, perhaps the largest opportunity lies in moving beyond individual nudge initiatives and toward the broader education of the marketing community. Increasingly, we are teaching marketers the basic tenets of behavioral economics and training them on applying the nudges as a complement to traditional marketing efforts. In a recent European workshop, managers created their own "first little nudge" as an important step to immersing them in a new way of thinking. And ultimately, we envision that nudging will join the toolbox alongside the 4 Ps and other levers for impacting shopper behavior.

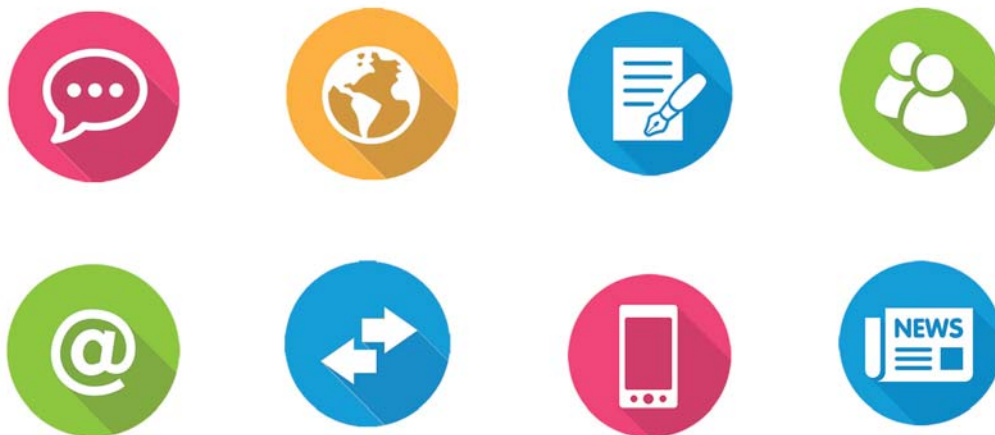
Exploring new ways

In a world of overwhelming choice and increasing product parity, marketers are recognizing that they cannot differentiate effectively through traditional features, benefits and claims – and that persuasion (via advertising) does not necessarily lead to action (in the store).

Instead, many are exploring new ways to grow and they are finding it easier to help people follow through on their existing intentions (vs. trying to change their underlying beliefs). As importantly, they are finding it more profitable to help people create new habits and drive category growth rather than fighting for brand share in declining markets.

Nudge holds the potential to shift the paradigm, by helping companies to think beyond marketing and to systematically apply a new way of thinking – and a more effective way of changing shopper behavior. 

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Founded 1972 | 325+ employees
Matt Hayes, President and CEO



The Bernett Group is a marketing research firm providing organizations with data collection services and survey solutions. We collect actionable, reliable data empowering our clients to make informed business decisions – ranging from sales, product development and R&D to customer experience, employee insight and brand identity. Headquartered in Boston and operating call centers across the United States, Bernett's capabilities include call center services, rich-media online surveys,



smart panels and virtual focus groups. With over 40 years of experience in the marketing research industry, when you have questions, we know how to provide you with the answers you need to move your business forward.

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www.bernett.com



CANADIAN
VIEWPOINT INC.

Canadian Viewpoint, Inc.

Founded 1980 | 50 employees
Carol Udell, CEO

Canadian Viewpoint specializes in high-quality fieldwork and data collection solutions for offline, online, qualitative and quantitative research. We are experts in English and French



Canada and also offer fieldwork services globally. Our proprietary online panels include a Canadian consumer panel of more than 300,000 double opt-in validated panelists, as well as other specialized panels (e.g., medical). We offer programming, sampling, face-to-face (e.g., intercept/mall research, taste/pack tests, exit interviews, IDIs, groups) and CATI with our own in-house phone center. We pride ourselves on building innovative and unique solutions to meet your fieldwork needs in a timely, friendly and collaborative manner.

Phone 905-770-1770
canview.com



Capture Information Services Group

Founded 1991 | 50 employees
Stuart H. Marion, Managing Partner

With more than 25 years of experience and expertise, we have extensive knowledge in not only every aspect of the survey process but with many survey topics,



allowing us to zero in on the best practices. We don't use pre-made, off-the-shelf programs but rather work closely with you to create programs and reporting options customized to best meet your needs and budget. We specialize in executing customer service assessment programs and organizational effectiveness research interviews. Using our toll-free inbound call centers or online methodologies, Capture also provides in-depth personal and professional interviews for employee, consumer and B2B research.

Phone 772-223-5400, 866-463-8638
www.captureisg.com



Founded 1996
Terry Lawlor, Executive Vice President



Confirmit enables organizations to develop and implement market research and customer experience programs that deliver insight and drive business change. Confirmit's clients create multichannel, multilingual feedback and research programs that engage customers, deliver a compelling respondent experience and provide high return on investment. We have over 20 years of experience in listening to the requirements of market research agencies and developing software to meet their ever-evolving needs. As clients demand faster,

cheaper and more strategic insights to drive business decisions, Confirmit understands your challenges and is constantly developing solutions that allow you to deliver rapid, high-quality and cost-effective research results.

Phone 800-864-5266
www.confirmit.com



Founded 2011 | 160+ employees globally
Hugh Davis and Keith Price, Co-CEOs



Our passion is simplifying access to insights for better business decisions. Leading companies around the world rely on our easy-to-use, collaborative tools for seamless access to global target audiences, survey programming and management, data visualization and reporting. Work together with us, do it yourself or let us do everything

for you. No matter the size or type of project, Critical Mix believes that you should always be able to contact someone to get help or a question answered. Our experienced team cares deeply about your business, anticipates your needs and is always available whenever needed.

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www.criticalmix.com



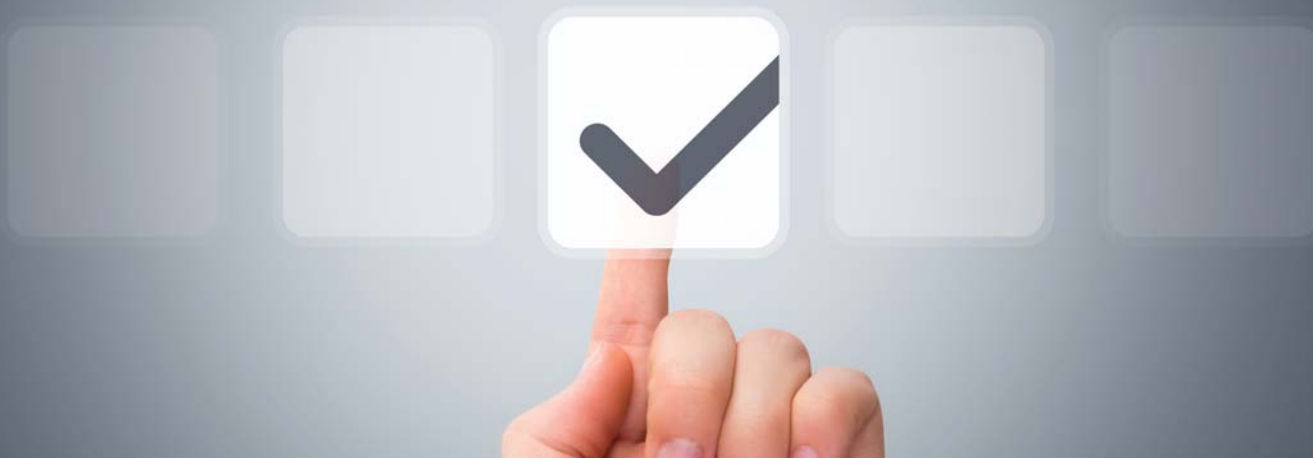
DEEPER CONNECTIONS. DEEPER INSIGHTS.



Founded 1988 | 480 employees
Laura Livers, CEO

FPG provides high-quality marketing research data collection services by leveraging new techniques and technologies that make market

insights more accessible, accurate and affordable. Whether quick-turn insights or more in-depth research,



FPG incorporates accepted methodologies with digital solutions. Its team of survey experts has the sampling expertise for pinpoint accuracy in delivering the right participants, at the right time, in the right environment. FPG's 1.6 million-member panel provides the participants required for any qualitative or quantitative study. With 18 focus group facilities in major U.S. markets, FPG is committed to providing unrivaled research solutions with professional integrity and the highest level of service quality.

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FV Decipher®

FV Decipher

Founded 1994 | 400 employees
 Jamin Brazil, CEO

FV Decipher is the fastest, easiest and just plain best online mobile survey solution. It's the only real-time insight platform built for researchers,



by researchers. FV Decipher delivers best-in-class survey programming, data collection and reporting. The solution's mobile-first design works on virtually any device and 90 percent of the world's largest companies and market research firms have utilized it. We continually partner with pro researchers to improve completion rates, increase programming productivity and ease systems integration. Top enterprise clients include: eBay, Microsoft, Nielsen, Facebook, Johnson & Johnson, Disney, Coca-Cola, Visa, Lightspeed GMI, Eli Lilly and many Fortune 500 companies.

Phone 844-712-6777
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GRAVIC®

Gravic, Inc. – Remark Software

Founded 1979 | 50 employees
 Dr. Bruce Holenstein, President and CEO

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software technology and survey solution leaders with over 75,000 customers in 130+ countries, Remark Software powers countless surveys across the globe. Remark Office OMR collects and analyzes data from plain-paper surveys you create and print. You scan your completed surveys with an image scanner or multifunction printer (no special forms/hardware needed). Create and administer online surveys with Remark Web Survey® on your Web site. Use the products together for mixed-mode surveys. Both products contain built-in analysis reports and allow exporting data to a variety of formats.

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IRONWOOD INSIGHTS group, LLC

Ironwood

Founded 2017
Brad Larson, Founder/CEO

Ironwood Insights Group leads the market research industry by offering a seamless combination of all research methodologies into one point of service. Our ability to provide consultation, design questionnaires, source sample, field surveys, analyze data and report valuable insights to our clients is unmatched. Our clients can focus on implementation and strategy rather than fielding and tabulations. Our qualitative and quantitative methodologies enhance one another as a combined solution or can be provided as stand-alone services. We are a smaller firm dedicated to providing the best research solutions at reasonable rates. Call or visit our Web site today for "Insights that provide clarity and drive action."

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www.ironwoodinsights.com



jibunu

Jibunu

Founded 2003 | 18 employees
Ken Berry, CEO

Jibunu is a pioneer in technology-enabled research services with roots as a software development company and a history of cutting-edge online data collections services and solutions. Known for quantitative survey programming, Jibunu focuses on the respondent experience while addressing the researcher's needs. With their unique combination of technological prowess and understanding of the research industry, Jibunu allows researchers the flexibility to bring their ideas to life. They work collaboratively with research teams, using technology to differentiate them from their competitors. From quantitative collection needs to qualitative support to data migrations and integrations, Jibunu has your technology needs covered.

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www.jibunu.com

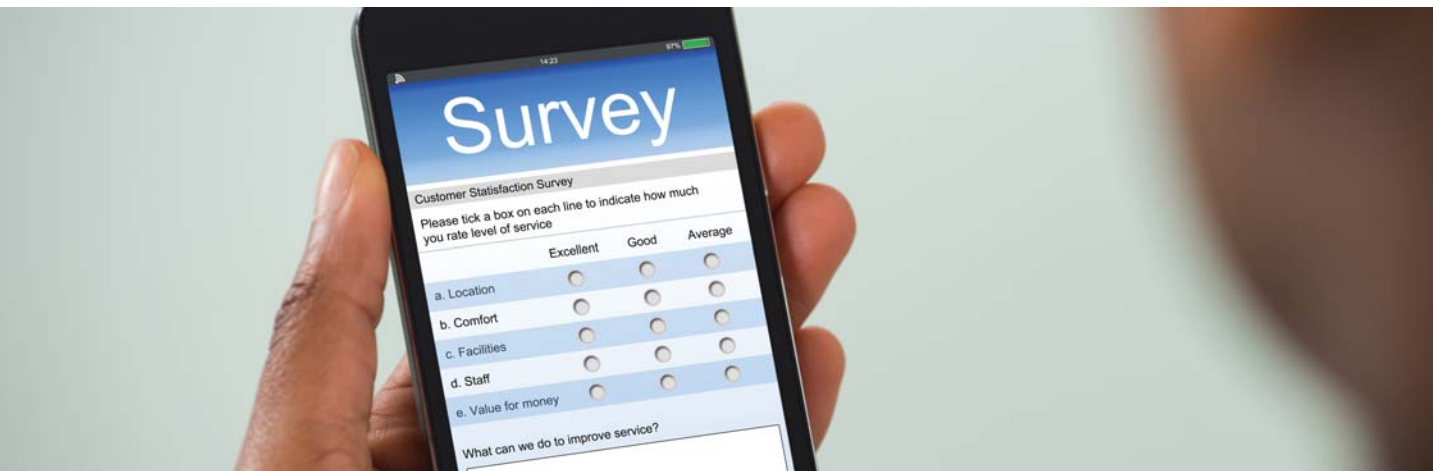


LIGHTSPEED Lightspeed

Founded 1996 | 700+ employees globally
Caroline Frankum, Global CEO

Lightspeed is bringing brands closer to their customers than ever before. Our incredibly talented and award-winning survey design team (29 awards and counting in the last five years!) can help connect you to your target customer. And from incorporating video open-ends and tracking emotional reaction, to designing the perfect mobile-optimized survey to meet consumers in the moment, we're embracing technology to illuminate data through deeper conversations and richer insights. Headquartered in Warren, N.J., with offices around the globe, Lightspeed is part of Kantar, one of the world's leading data, insight and consultancy companies.

Phone 908-605-4500
www.lightspeedresearch.com





M3 GLOBAL RESEARCH

M3 Global Research

Founded 2006 | 200+ employees
Amber Leila Esco, CSO

M3 operates in the Americas, Asia and Europe with 3.5 million+ physician members via our medical portals. Within the health care/life sci-



ence industry, M3 focuses beyond market research with medical education, ethical drug promotion, clinical development, job recruitment and clinic appointment services. M3 Global Research provides the most comprehensive and quality research recruitment and support services available industry-wide, with relationships reaching respondents in over 70 countries. M3 maintains ISO 26362 and 27001 certifications and provides management services that cover the spectrum of research methodologies utilized today. Beyond HCPS, M3 creates and maintains panels of patients and caregivers.

Phone quantitative: 844-M3-QUANT;
qualitative: 844-M3-VIEWS
www.m3globalresearch.com



Your Global Research Partner

Markelytics Solutions

Founded 2003 | 300 employees
Mr. Jasal Shah, MD/CEO

Markelytics Solutions is a leading global agency providing end-to-end research solutions, trusted by the best. We are a worldwide presence facilitating real market intelligence using the latest methodologies, best-in-class research techniques and cost-effective measures for the world's leading research professionals and agencies. We have created multiple success sto-

ries for 90+ clients from 80+ markets across the globe, covering Asia, Africa, Middle East, America and Europe.



Having completed 4.1 million surveys and more, we have established ourselves as the most preferred partner for providing survey solutions. We also have proprietary health care panels in nine countries and our services include global project management, global data collection, survey programming and data processing.

www.markelytics.com





MARKETSIGHT

MarketSight LLC

Founded 2006 | 25 employees
Michael DeNitto, CEO

MarketSight is the easiest and most powerful data visualization and reporting software for researchers and data analysts. Transform any sur-

vey into meaningful insights with MarketSight's intuitive and robust



reporting tools and interactive dashboards. MarketSight seamlessly integrates with all leading survey platforms and data formats for fast and easy uploads, data editing, automated statistical testing and instant access to survey results. Only MarketSight offers the unique ability to easily collaborate among colleagues and share key findings across enterprises, within a secure, dynamic environment at no additional charge. Start a free trial today at www.marketsight.com.

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Mindfield – Tech Integration and Audience Insights

Founded 1980 | 110 employees
Gary McMillion, CEO



Boasting a rich tradition of almost 40 years in market research and data collection as McMillion Research, Mindfield is the high-end, single resource for all of your online and CATI needs. State-of-the-art online solutions that are robust and pleasing to both the client and online users are daily deliverables for our team. Coupled with MindField Online, the premier consumer panel, research is done right and in high-quality with our real-time electronic countermeasures to insure quality data (IQD™). Real-time reporting, dashboards and crosstabs that are presentation-ready are always a few clicks away on all projects. We are the solution you're looking for.

Phone 800-969-9235
mindfieldtech.com



mo'web GmbH

Founded 2004 | 43 employees
Herbert Höckel, CEO

Mo'web utilizes digitalization to make better market research. With more than 1.5 million users in proprietary panels and equipped with a diverse set of innovative tools, mo'web conducts national and international surveys. Mo'web offers the whole spectrum of classical market research. Leading your project as a full-service company or as a provider of selected services only. The company was founded in 2004 in Düsseldorf, Germany. To this day it is independent and managed by its founders.

Phone +49 211 8282800
www.mo-web.net



Opinion Access Corp.

Founded 1995 | 400+ employees
Lance Hoffman, CEO

Opinion Access Corp. (OAC) has been delivering expert survey solutions through superior project management for over 20 years. Regarded as one of the leading companies in the industry, OAC provides researchers and consultants with a one-stop shop for all data collection and data processing needs. Our 350+ CATI interviewing stations alongside our unique online surveying solutions enable us to cater to clients with a wide range of varying budgets and goals. 100 percent Web-enabled, we offer CATI and CATI over Web from any of our 350+ interviewing stations, along with programming and hosting for full-service or sample-only online studies.

Phone 718-729-2728
www.opinionaccess.com



Reconnect Research

Founded 2015 | 9+ employees
Scott Richards, Co-Founder and CEO;
James Diorio, Co-Founder

Reconnect Research offers a new telephone research methodology that is fresh, random, representative sample. RICS (Redirected Inbound Call Sampling) is an inbound call-sampling tool, where the respondent initiates the call. RICS' mission is to provide telephone research with precision at a fraction of the time and cost of outbound DFRDD surveying. Compared to DFRDD, RICS yields unweighted samples that more closely match the characteristics of the general population. "We had an UWE of 1.14 ... I was shocked ... I've fielded well over 100 outbound telephone surveys and I've never had results that matched the population this nicely," said Burton Levine of RTI International.

Phone 1-800-Reconnect
www.reconnectresearch.com





Red Centre Software

Founded 2007 | 6 employees
Dr. Dale Chant, Director

Red Centre Software develops and markets Ruby, the world's premier crosstabulator for data processing and analysis on desktop and mobile platforms. Only Ruby gives you the confidence that, no matter how big, complex and dynamic the survey, the client's requirements can always be met. Quantum-style levels, global FMCG trackers, transaction data (millions of cases) – we have yet to encounter a job Ruby could not handle. Intuitive modern GUI, scriptable, online dashboards, auto-coded verbatims, many stats and direct links to R, push/pull to MS Office and open architecture for integration into wider processes. Also available as a pure engine for powering your own custom portals.

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consultants and online specialists accessing over 40 million globally. Niche organization offering a solution based on client needs. With 15+ years, a proven process, consistent management, a research background in addition to the common technology experience, we have achieved the perfect balance in key attributes making our ability to "Simplify Complexity" greater than any other single company. Single point of contact using the right methodology to find low-incidence, DMs, IT, executives, health care, B2B, B2C. Programming, fast turnaround and flexible pricing.

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Secret Shopper®

Founded 1990 | 50 employees
Paul F. Ryan, CEO

At Secret Shopper®, our expertise is evaluating the customer experience both in the digital and brick-and-mortar worlds. Whether

you're reaching out to customers, employees or vendors, we provide survey options online, over the phone or yes, even by mail. With over 25 years of experience, we have the participants in place to get the job done. Our in-house IT group can create innovative mobile apps; apps that are easy to navigate/read on any device to meet any business objective. Our Minneapolis-based technical support team prides itself on providing world-class customer service. Find out more here: www.secretshopper.com.

Phone 763-525-1460
www.secretshopper.com



Snap Surveys

Snap Surveys, Ltd.

Founded 1981 | 60 employees
Dr. Steve Jenkins, Managing Director/CEO

Building on a unique combination of survey software and research expertise, Snap Surveys has developed innovative survey solutions, becoming a

leading survey software provider. Snap Surveys offers both survey software and feedback management solutions with the flexibility of desktop survey software, data collection solutions and survey design services to offer you a fully comprehensive solution. Snap Survey software offers professional researchers a suite of integrated solutions for questionnaire design and administration across all modes of survey research – online, paper and mobile, including: smartphone, tablet and kiosk surveys, in any language. Collect data and easily analyze and generate reports in a complete survey software solution.

Phone U.S. office: 603-610-8700;
U.K. office: 01454 280800
www.snapsurveys.com



ReRez

Founded 2002 | 10 employees
Debbie Peternana, CEO

"If We Can't Do It, It Cannot Be Done!" ReRez specializes in online panel research and creative mixed-mode recruitment. Methodology



SSI (Survey Sampling International)

Founded 1977
Chris Fanning, President and CEO

Celebrating 40 years in business, SSI is the premier global provider of data solutions and technology for consumer and business-to-business survey research. SSI reaches participants in 90+ sample countries via Internet,

telephone, mobile/wireless and mixed-access offerings. SSI staff operates from 40 offices and remote staff in over 20 countries, offering



sample, data collection, CATI, questionnaire design consultation, programming and hosting, online custom reporting and data processing. SSI's employees serve more than 3,500 customers worldwide.

Phone 203-567-7200
www.surveysampling.com



Survata

Founded 2012 | 25 employees
Chris Kelly, CEO

Survata is a technology-driven research company that sells brand intelligence to the world's leading brands. We let clients measure consumer behaviors and mind-sets after every brand touchpoint. We pioneered retargeted survey technology that tags consumer actions (page visits, purchases, ad impressions, etc.) then retargets those consumers with a survey across our enormous publisher network. The respondents take a survey to unlock the publisher's existing content. This approach reaches non-panel respondents, hyper-targeted by specific online and offline actions. Our solutions include market research, ad research and customer research. We are based in San Francisco and serve clients globally.

Phone 800-736-0025
www.survata.com



VOXCO Inc.

Founded 1976 | 65 employees
Vincent Auger, VP of Sales

Voxco offers one of the broadest and most flexible survey software platforms in the industry. Maximum survey efficiency from a central database that serves multiple survey channels. Collect and process respondent data via device-responsive online surveys, phone interviews (CATI, IVR and dialers) or face-to-face interviewing (CAPI).

Clients appreciate the flexible data hosting options, advanced logic features, robust panel management capability and personalized service

that Voxco offers. A global industry leader in survey software for 25+ years, currently supporting hundreds of clients in over 30 countries from offices in Canada, USA, France, U.K., Germany and Australia.

Phone 514-861-9255
www.voxco.com



Q

Names of Note

■ In Milford, Conn., *Subway Restaurants* has appointed **Karlin Linhardt** as senior vice president of marketing for North America.

■ Chicago-based food company *Conagra Brands Inc.* has named **Barry Calpino** as vice president of innovation.

■ In London, research agency *Harris Interactive* has appointed **Taneem Salim** as a research executive for its technology, media, telecoms and entertainment research practice.

■ *Mazda North American Operations*, Irvine, Calif., has appointed **Dino Bernacchi** as CMO for the company's U.S. operations.

■ *Toyota Motor North America*, Plano, Texas, has appointed **Vinay Shahani** as vice president, integrated marketing operations.

■ Workforce management company *iWorkGlobal*, San Francisco, has promoted **Andrea Norup** to vice president of product and implementation.

■ **Kate Sandman** has joined *MFour Mobile Research*, Irvine, Calif., as a senior solutions executive, while **David Jeong** has joined as a solutions development representative. Separately, **Rob Chrono** has joined the firm as CFO.

■ Market intelligence firm *InCrowd*,

Boston, has hired **Janet Bays** and **Kathy Relias** each as vice president of business development and **Katie Ka** as senior director of client success.

■ Des Moines, Iowa, agricultural research and consulting firm *KG MarketSense* has appointed **Kevin Ryan** as the key account manager serving animal health clients in Europe as well as animal health and other agricultural clients in Canada. Ryan will also assist in developing new information products for the animal health market. He will be located in Montreal.

■ **Byrne Hobart** has joined research and analytics firm *M Science*, New York, as a senior analyst.

■ Needham, Mass., marketing intelligence software firm *Visual IQ* has appointed **Wayne St. Amand** as CMO.

■ Researcher *GfK's* global health practice has named **Pankaj Thapar** as health industry lead for North America. He will be based on the West Coast in GfK's Bay Area offices in San Francisco and Sunnyvale, Calif. **Jan Güse** moves to a similar leadership role in the Germany/Switzerland region.



Ryan



Thapar



Güse

■ **Jonathan Kateman** has been appointed as general manager for Waltham, Mass., e-mail marketing firm *Constant Contact*.

■ Pittsburgh-based research firm *Olson Zaltman* has named **Gayle Fuguitt**, chief of customer insights and innovation at *Foursquare*, and **Catharine Hays**, executive director of the Future of Advertising program at The Wharton School, to its board of advisors.

■ **Helen Parfitt** has joined health care research and consulting firm *Research Partnership* as head of its *Therapy Watch* market-tracking tool at the company's global head office in London.



Parfitt

■ Sales and marketing services company *Maritz*, St. Louis, has appointed **Charlotte Blank** as chief behavioral officer.

■ Omaha, Neb., researcher *The MSR Group* has hired three new employees to support business growth: **Karl Petersen** as director of research analytics; **Joni Williams** as senior project manager; and **Brandie Allen-Rezac** as marketing and public relations manager.

■ San Diego digital marketing agency *BrightHaus* has promoted **Natacha Gaymer-Jones** to vice president.

■ Columbia, Md., marketing agency *Merkle* has appointed **Paul Walczyk** as vice president, client service group leader.

■ Minneapolis-based food company *General Mills* has named **Jeffrey Harmening** as CEO. He has also been elected to the General Mills board of



directors. Harmening succeeds **Ken Powell**, who has served as chairman and CEO since 2007. Powell will continue to serve as chairman for a transition period until his retirement, expected within the next year.

■ **Shaun Hawley** has joined Warren, N.J., researcher *Lightspeed Health* as director, global healthcare panels. In London, *Lightspeed* has appointed **Hannah Soar** as director, business transformation.

■ Seattle-based mobile marketing and advertising technology company *Vehicle* has hired **Rich Davis** as senior manager of insights and analytics.

■ Germany-based researcher *Kleffmann Group* has named **Goran Jovcevski** as managing director for the firm's Australian operation, based in the Melbourne head office.

■ In London, data collection firm *SHC Universal* has hired **Olga Mordovina** as senior project manager in the EU.

■ India-based research firm *MRSS India* has appointed **Indroneel Dutta** as vice president (client servicing).

■ Market intelligence firm *InCrowd*, Boston, has named **Rob Lubash** as chief financial officer.

■ Dublin-based customer engagement solutions firm *Openet* has appointed **Janne Ohtonen** as director of customer experience management.

■ Digital market intelligence company *SimilarWeb*, San Francisco, has appointed **Stephen Kraus** as chief of insights.



Hawley



Soar



Mordovina

■ *Phoenix Marketing International* has appointed **Michael Arluck** as a vice president in its converged technology and media practice. Arluck will be based in the firm's New York City office.

■ Atlanta researcher *CMI* has added **Matthew Colón-Díaz** as research associate to its life sciences team, while **Will Leopold** has been promoted to account director.

■ Albuquerque, N.M., researcher *Ameritest* has appointed **Emily Higgins** as vice president in the firm's Chicago office.

■ St. Louis-based research agency *Brädo Creative Insight* has promoted the following individuals to vice president: **Kim Bowers**, who will serve as head of the shopper insight business unit; **Brad Fuller**, who will serve as head of internal design and branding; **Zach Foster**, responsible for driving the firm's new business efforts; and **Sabina Ramic**, who will lead the project management team.

■ **Tim Sauer** has joined *Iselin*, N.J.-based research firm *Schlesinger Associates* as senior vice president, client solutions. Sauer is based in St. Louis.

■ State College, Pa., in-store behavior analytics firm *VideoMining* has added **Mike Burkenbine** as SVP, retail solutions.

■ Marketing analytics firm *Analytic Partners*, New York, has appointed **Marcia Awobuluyi** as CFO.

■ **Simon Hay**, former CEO of U.K.-based customer science company *dunnhumby*, and **Anne Roggeveen**, professor of marketing at Babson College in Boston, have been nominated as board members for Sweden-based researcher *Nepa*.



Colón-Díaz



Sauer

■ *The MSR Group*, an Omaha, Neb., research company, has appointed **Cherie Carlson** as vice president research, Energy Division, a newly-created position.

■ In Washington, D.C., researcher *Harris Insights & Analytics* has appointed a new executive management team. **John Gerzema** and **Will Johnson** will become co-CEOs, while **Mark Penn**, managing partner of *The Stagwell Group*, will become chairman. **Jonathan Gardner** will serve as COO.

■ Framingham, Mass., firm *IDC Health Insights* has appointed **Mutaz Shegawi** as research director for its Provider IT Transformation Strategies service.

■ *Ipsos Marketing*, New York, has appointed **Alison Chaltas** as global president, path to purchase.

■ Des Moines, Iowa, agricultural research firm *KG MarketSense* has appointed **Greg Roggenkamp** as a key account manager for the company's AMIS panels and **Kyle Staley** as key account manager for ad hoc research.

■ Research firm *Opinions LTD*, based in Chagrin Falls, Ohio, has hired **Tami Bergman** and **Trudy Fula** both as client services/project manager.

■ **Karim Belhadjali** has joined Bethesda, Md., researcher *Abt Associates* as a principal associate of environment and natural resources.

■ **Scott Popaditch**, CEO of White Plains, N.Y., merchandising and marketing services company *SPAR Group Inc.*, has resigned from the company. The firm's board of directors has begun the search for a replacement. Current chief operating officer **Kori G. Belzer** will serve as interim-CEO.



Roggenkamp



Staley

Q

Research Industry News

News notes

■ **Nielsen**, New York, has announced plans to replace paper diaries by installing nearly 15,000 television audience meters in approximately 7,000 homes across the 140 markets that are currently measured by Local TV paper diaries. This is part of Nielsen's drive to implement universal electronic television measurement in all 210 Local TV markets. The installation of the electronic meters will provide coverage that will address the limitations of solely using set-top-box data for audience measurement in Local TV markets.

■ Stockholm-based software company **Cint** has reported that the consumer base in its platform has reached 40 million globally, up from 19 million six months ago. Cint CEO Morten Strand says the company is on track to surpass 100 million registered unique consumers by the end of 2018.

■ Baldwinsville, N.Y., firm **Research & Marketing Strategies Inc.** marked its 15-year anniversary on May 5.

Acquisitions/transactions

■ **Essman/Research**, the research division of Des Moines, Iowa-based Essman/Companies, which includes Essman/Associates and Essman/

Research, has been acquired by **State Public Policy Group** (SPPG), located in West Des Moines, Iowa. Deborah Stearns, vice president of Essman/Companies and director of Essman/Research, will lead Essman/Research as a division of SPPG. Essman/Research will move from its current location to a new research focus facility adjacent to SPPG's headquarters. Denise Essman, president and CEO of Essman/Companies, will retain ownership of Essman/Associates.

■ Research company **mTAB**, Anaheim, Calif., has expanded its global capabilities through the acquisition of **Gamma Associates** in the U.K., the establishment of an office in Japan and a partnership with research training firm **Analytic Edge** in China. Gamma Associates and mTAB will be fully integrated under the leadership of mTAB CEO Alex Gelman.

■ Private equity fund **Stagwell Media LLC** has acquired **SCOUT**, an Atlanta-based marketing communications firm focused on health care and consumer marketing. Terms of the deal were not disclosed. SCOUT's leadership team will continue to manage agency operations.

■ Mobile survey platform **Osurv**, Los Angeles, has reported that its technology has been acquired by **Tan Capital Partners**, a private equity firm in Singapore, for an undisclosed sum. Tan Capital Partners plans to integrate Osurv's technology into the hotels it owns and operates throughout Asia.

■ U.K. consumer insight agency **Join the Dots** has undergone a management buyout by its senior management team, led by Managing Director Quentin Ashby and Sales and Marketing Director Graeme Lawrence. The deal sees company founders and previous majority

shareholders Pete and Trish Comley reducing their shareholding in the £9.8 million revenue business. Trish will step down as chairman of the company and Pete will remain on the board as a non-executive director along with Ashby and Lawrence. Also taking part in the buyout are Andy Buckley, innovations director; Andy Cumming, head of international; and Adele Mann, operations strategy director.

■ Sweden-based eye-tracking technology company **Tobii** has acquired substantially all of the assets of **Sticky**, a San Francisco-based eye-tracking and emotion measurement platform. Sticky will be integrated with Tobii Pro, the business unit that provides eye-tracking research solutions. Prior to the transaction, Tobii was a minority shareholder in Sticky.

Alliances/strategic partnerships

■ Scottsdale, Ariz., firm **JDA Software Group Inc.** has partnered with U.K.-based consumer science company **dunnhumby**. The partnership combines consumer insights via dunnhumby with JDA's space and category execution solutions to provide a one-stop insight and execution capability. The offering will allow retailers and trading partners to develop and execute shopper-centric merchandising plans with localized assortments, offers and space plans built to drive further automation, sales and growth.

■ In London, **Research Now** has expanded its partnership with U.K. loyalty program **Nectar**. Research Now will manage the Nectar Canvass panel, an online panel of individuals who have opted in to take surveys in return for Nectar points.

■ U.K. customer science company **dunnhumby** has formed a partner-



quirks.com/articles/2017/20170714.aspx

ship with **Twitter** to help FMCG brands in the U.K. quantify how their investment in Twitter's targeted advertising impacts sales. Tesco's active ClubCard users are anonymously linked to Twitter's active U.K. users, showing the effect of ad exposure on actual sales.

■ Online payments-as-a-service platform **CCBill** has joined the **National Retail Federation** (NRF) as an associate member of Shop.org, a global trade community of online retailers, technology, research and consulting companies. CCBill will contribute to Shop.org's efforts to promote technology development in the digital marketplace by introducing its ecosystem of merchants, affiliates and integration partners to the NRF community.

■ San Francisco-based social media analytics company **Socialbakers** has become a data partner with New York-based statistics company **Statista**. Socialbakers will supply Statista with social media data pertaining to Twitter and YouTube, giving Statista customers access to data around fan growth, engagement, interactions and content posts.

■ New York-based data management platform **Lotame** has formed a partnership with San Francisco-based research company **Survata** to create Segment Validation, which provides a universal "ratings currency" for digital advertising. The partnership also allows for tracking and measurement of survey responses, which can be combined with other first-, second- and third-party data segments via the Lotame DMP. Marketers, agencies and publishers can conduct segment validation and audience profiling as well as custom segment creation.

■ New York-based marketing technology company **Tapad** has partnered with Reston, Va., consumer intelligence firm **Resonate**.

Through the partnership, Resonate will leverage the Tapad Device Graph to better understand its mobile app audiences and provide brands with a more direct connection to their intended consumers.

■ In New York, research agency **Kantar Millward Brown** has partnered with location data firm **Cuebiq** to help marketers measure the offline ROI of their advertising. The partnership will provide a new tool that integrates geolocation and campaign effectiveness capabilities to evaluate a campaign's ability to drive audiences to key physical locations.

■ In London, **Research Now** is partnering with **Air Miles** in the Middle East to launch research panels in the UAE, Qatar and Bahrain. The partnership will allow Air Miles Middle East members to participate in research surveys by enrolling in the Air Miles Voice Panel. In return, members will receive rewards for their participation in surveys with Air Miles. The partnership will also provide researchers access to a sample of customers across the region.

Association/organization news

■ **ESOMAR** has named the following as U.S. Ambassadors: Fiona Blades, president and chief experience officer, MESH Experience, New York; Simeon Chow, director, consumer and marketplace insights, Altria Client Services, Richmond, Va.; John DeBiasio, partner, Russell Research, East Rutherford, N.J.; Carol Glasheen, vice president, IDC, Boston; Camille Nicita, president and CEO, Gongos, Auburn Hills, Mich.; Joanne Robbbaro, senior vice president, general manager, LRW, Los Angeles; Juan Carlos Sanchez, VP audience insights and analytics, Sony Pictures TV, Miami; and Brett Sciotto, president and CEO, Aimpoint Research, Columbus, Ohio.

■ **The American Marketing Association** (AMA), Chicago, has appointed Jeremy Van Ek as chief operations officer and Jennifer Faris Severns as chief experience officer. They will also serve on AMA's executive committee.

■ **The Social Media Research Association** (SMRA) has formed to develop best practices for privacy to measure and responsibly use social media as a source for insights and marketing efficiency. The association will focus on social media analytics, social listening and brand reputation management. The founding board of advisors include: Kathy Doering (SMRA founding president), Ann Michaels & Associates Ltd.; Seth Grimes, Alta Plana Corporation; Tom Anderson, Odin Text; Michael Lieberman, Multivariate Solutions; Dan Foreman, Hatted; Annie Pettit, FMRIA; Vivek Shivpuri, Prelytics; Imran Anwar, Cloud 9 Global Inc.; Lane Mann, Phoenix Marketing International; Jim Matorin, Smartketing; and Mark Michelson, (SMRA executive director), Association Advisors.

■ **The American Marketing Association**, Chicago, has announced its 2017 Fellows, recognizing members who have made contributions and gained prominence in the field of marketing research. The 2017 honorees include: Ajay Kohli, professor of marketing and chair at Georgia Institute of Technology; V. Kumar, director of the Ph.D. program in marketing, Georgia State University; John G. Lynch, Jr., Ted Anderson professor of marketing, University of Colorado-Boulder; and Christine Moorman, T. Austin Finch professor, sr. of business administration, Duke University.

Awards/rankings

■ Los Angeles nonprofit organization **Women in Research** has released its Top 10 Female MR Entrepreneurs list: Fiona Blades, MESH Experience; Roz Calder, Needscope; Dianne Hessian, C-Space; Rana el Kaliouby, Affectiva; Janet Kosloff, InCrowd; Kristin Luck, Luck Collective and Shelley Zalis, TFQ (co-founders of OTX); Roseanne Luth, Luth Research; Deborah Mattinson, Britain Thinks; Leslie Townsend, Cannabiz (founder of Kinesis); and Kristi Zuhlke, Knowledge Hound.

■ U.K. insight consultancy **Firefish** and **PayPal** have won the Best Client-Supplier Collaboration Award at the MRMW Awards 2017 in Chicago. Firefish was recognized for its work with PayPal on generating insight that helped in developing PayPal's new global positioning.

■ U.K. researcher **Vision One** has won the **Recommended Agency Register's** (RAR) Best Market Research Agency Award 2017. The RAR awards are based on client recommendations and reviews of their agencies, with satisfaction scores used as a measurement for success. Ratings are collected for criteria such as creativity, effectiveness, strategic thinking, value for money and client service.

■ Madeline Doering, Mingyan Zhang and Meghan Adams from **Loyola University Chicago** have won **GfK's** Next Generation Competition, which encourages undergraduate students to design and execute research and data analysis on issues for brands and marketers. The winning team looked for a correlation between co-branding and loyalty programs in the fashion industry in an age of omnishopping. Through a survey and a mobile simulation game, they found a lack of customer attention to co-branding campaigns while shopping online, compared to higher engagement while shopping in-store. The team receives a \$1,000 cash prize and a visit to GfK's New York City headquarters.

■ Canadian marketing and re-

search consultancy **Sklar Wilton & Associates** took first place at the **Great Place to Work** awards ceremony held in Toronto, winning the award for Best Workplaces in Canada for Small Companies.

■ Mario X. Carrasco, co-founder and principal of Burbank, Calif., firm **ThinkNow Research**, has been awarded the 2017 Young Entrepreneur of the Year award on behalf of the Los Angeles District Office of the **U.S. Small Business Administration**.

■ Oslo, Norway-based researcher **Confermit** has announced the winners of the 2017 Confermit Achievement in Customer Excellence (ACE) Awards, which recognize Confermit clients who demonstrate innovation in their voice of the customer programs. Some winners of the Judges' Choice Award include: Ally Financial and Philadelphia Insurance Companies in the Business Impact category; Canon Solutions America, LexisNexis and Survey Sampling International with Orange in the Innovation category; and W5 with eir Business in the Insight through an MR Agency category. A full list of winners can be found on Confermit's Web site.

New accounts/projects

■ **Nielsen**, New York, has been named to **Google's Marketing Mix Model Partner** program, allowing Nielsen to collect Google advertising impression and spend data directly from Google. Collectively, this combines Nielsen's marketing mix modeling capabilities and Google's media data, giving advertisers the ability to measure the ROI of their digital investments and understand the drivers of ROI to improve returns year-over-year.

■ Boston-based consumer insights firm **Crimson Hexagon** has expanded its participation in the **Twitter Official Partnership** program, giving the firm complete access to Twitter data products and streams. Crimson Hexagon is also collaborating with Twitter's product team to bring new co-developed solutions

to market and working to identify new ways that Twitter data can help brands and agencies.

■ Baldwinsville, N.Y., firm **Research & Marketing Strategies Inc.** has been granted conditional approval from **Centers for Medicare & Medicaid Services** to conduct the CAHPS for Merit-based Incentive Payment System Survey for the 2017 performance period survey administration. The survey measures 12 key domains of beneficiaries' experiences of care.

■ In London, researcher **Toluna** was named the official survey partner for **Cannes Lions 2017**. The partnership ran throughout the International Festival of Creativity between June 17-24 in Cannes, France. Toluna's digital insights platform QuickSurveys was used to administer surveys and provide reporting and insight to attendees.

■ Oslo, Norway-based researcher **Confermit** has been chosen by Naperville, Ill., food distributor **KeHE Distributors** to power its voice of the customer program. KeHE selected the Confermit Horizons platform to replace an ad hoc survey tool and allow the company to build a customer experience initiative. Rollout will begin with an online customer relationship survey to help KeHE deliver customer experiences across its distribution network.

New companies/new divisions/relocations/expansions

■ After 14 years as head of marketing for Plymouth, Minn., restaurant chain **Davanni's**, veteran researcher Tim Huberty has restarted his own firm, St. Paul-based **Huberty Research and Marketing**.

■ Montreal-based voice of the customer solutions firm **iPerceptions** has consolidated its Audience Recognition and Audience Optimization solutions under the Datacratic brand. Datacratic was acquired by iPerceptions in October 2016 and now operates as an iPerceptions company. The move creates two

separate brands: iPerceptions, which maintains its focus on voice of the customer solutions, and Datacratic, which focuses on audience data solutions for digital marketing campaigns and Web site personalization efforts.

■ **Branded Research**, San Diego, has introduced its new Branded Insights Department, headed by Kristen Miles. The company will provide clients with custom insights solutions and focus on market segmentation, gaining insights about habits and tastes within specific demographics to provide data to clients and for Branded Research white papers.

■ **Research Partnership**, based in London, is expanding its U.S. operations across the West and East Coasts. Director Tom Winter has relocated from London and is opening a new office in San Francisco, while Director Rachel Howard is opening a new office in New York. Winter is supported by Associate Director Birgit Eschmann and Research Manager Will Simpson. Michelle Toennies, senior research executive, and Rebecca D’Orazio, research executive, are both relocating from the Philadelphia office and two local graduates will join the team in June. Howard is supported by Fara Mboge, head of business development, syndicated and tracking services, and Alyssa Pritchard, senior research executive. Two local graduates will also join the New York team in June.

■ U.K.-based research agency **The Source** has opened an Australian office in Melbourne, led by Matt Swinson as managing director, who relocated from the London office.

■ **CourtLynn Enterprises Inc.** has launched **Griffin Wilds**, a new market intelligence arm based in Woodbridge, N.J., that works with digital research platforms to create products that uncover key motivators of customers. Senior leadership for Griffin Wilds includes Courteney Wilds as managing partner and Katherine McKeithen as senior associate.

■ Waban, Mass., research and consulting firm **Temkin Group** has

launched the Customer Experience (CX) Institute, a new division that offers online customer experience training for organizations. The CX Institute will initially offer corporate training, allowing organizations to license training for employees, and individual training.

■ Warren, N.J.-based researcher **Lightspeed** has opened a new office in Bangkok. Benchawan Phumphuengsri has been appointed client development manager and will manage local client relationships and operations across Thailand. Lightspeed has also appointed Anis Teh as client development manager in Malaysia.

■ **The Southeastern Institute for Research**, Richmond, Va., has re-branded, officially changing its name to **SIR** and creating a new brand identity that it says represents its evolution from a research-only business to a strategic consulting firm with research capabilities.

■ Data and analytics firm **Ugam**, New York, has opened a new office in Chicago to support the company’s growth.

■ Philadelphia-based branding agency **Finch Brands** has expanded its market research practice with the launch of FinchSight Research Communities. The expansion will be led by Chief Innovation Officer Tom Finkle. The proprietary platform will offer features like surveys, ideation sessions, live chats, focus groups and journals.

■ Armonk, N.Y., research firm **VeraQuest** has relaunched with a new focus on generating low-cost custom research. Specifically, the firm uses survey testing, soft launch and fraudulent respondent detection systems and handles all programming, sample acquisition and field management responsibilities.

Research company earnings/ financial news

■ **Nielsen**, New York, reported revenues of approximately \$1.53 billion

for first-quarter 2017, an increase of 2.6 percent compared to the first quarter of 2016. The company also announced that its board of directors approved an increase in the company’s quarterly dividend of 10 percent to \$0.34 per share.

■ Columbia, Md., marketing agency **Merkle** reported a net revenue of \$560 million for 2016, a 28.7 percent increase over its 2015 revenue of \$435 million.

■ For the first quarter of 2017, Paris-based researcher **Ipsos** reported revenue of €390.1 million, up 0.8 percent compared to the first quarter of 2016.

■ India-based researcher **MRSS India** reported a consolidated net profit of Rs 46.3 million for the year ended March 31, up 146 percent from last year.

■ For the first three months of 2017, Nuremberg, Germany, researcher **GfK** reported a decline in sales and income. In organic terms, consolidated sales were down 2.7 percent, with sales totaling €352 million. Adjusted operating income amounted to €21.6 million, compared to €32.1 million the prior year.

■ Research software firm **Dapresy**, headquartered in Sweden, has received support from a new investor, Nordic private equity fund Verdane Capital IX. Funding from the investment will be primarily used for development and support activities for its Dapresy Pro software, which allows users to create and deploy online dashboard reporting solutions for market research and customer experience management.

■ Seattle-based videoconferencing platform **Discuss.io** has closed \$5.025 million in Series A funding led by Unilever Ventures and Pereg Ventures, bringing the firm’s total funding to \$6.35 million. The company says the funding will be used to innovate its platform and expand its engineering and sales teams.

CALENDAR OF EVENTS

●●● can't-miss activities

The 2017 Pharma CI Asia Conference and Exhibition will be held on **July 13-14** in **Singapore**. Visit asia.pharmaciconference.com.

WAPOR will hold its 2017 Annual Conference on **July 15-17** in **Lisbon, Portugal**. Visit wapor.org/70th-annual-conference.

Insight Exchange Network will hold an event, 'Sentiment, Emotional and Behavioral Analytics to Boost Brand and Customer Insights,' on **July 17-18** at Marines' Memorial Club in **San Francisco**. Visit www.insightxnetwork.com/sentiment-emotional-behavioral-analytics.html.

Semiofest 2017 will be held on **July 19-22** at the Gladstone Hotel in **Toronto**. Visit 2017.semiofest.com.

AMA will hold its 2017 Summer Conference on **August 4-6** at the San Francisco Marriott Marquis in **San Francisco**. Visit www.ama.org.

AMSRS will hold its 2017 National Conference on **September 7-8** in **Sydney**. Visit www.amsrs.com.au/conference-information.

ESOMAR will hold its 2017 Congress on **September 10-13** in **Amsterdam**. Visit www.esomar.org.

AMA will hold its 2017 Annual Conference on **September 11-13** at Caesars Palace in **Las Vegas**. Visit www.ama.org.

Vegas. Visit www.ama.org.

The 2017 Pharma CI USA Conference and Exhibition will be held on **September 12-13** at the Hilton Parsippany hotel in **Parsippany, N.J.** Visit usa.pharmaciconference.com.

Research Association New Zealand will hold its annual conference on **September 14** in **Auckland, New Zealand**. Visit www.researchassociation.org.nz/2017-Conference.

The Strategy Institute will hold its Fourth Annual Digital Customer Experience Strategies Summit on **September 19-20** at the Fairmont Chicago, Millennium Park in **Chicago**. Visit www.digitalcustomerexp.com.

The Strategy Institute will hold its Digital Marketing for Financial Services Summit Europe event on **September 21-22** at The Tower Hotel in **London**. Visit www.digitalfinancialmarketing.com.

The Insights Association will hold its 2017 Insights Leadership Conference on **September 26-28** in **Palm Beach, Fla.** Visit www.insightsassociation.org/conference/2017-insights-leadership-conference.

The 2017 PMRG Institute will be held on **October 2-4** in **New Brunswick, N.J.** Visit www.pmr.org.

NMSBA will hold its Shopper Brain Conference - Europe

event on **October 5-6** at Hotel Casa400 in **Amsterdam**. Visit www.shopperbrainconference.com/amsterdam.

The Merlien Institute will hold its Qualitative360 APAC event on **October 11-12** in **Singapore**. Visit apac.qual360.com.

IQPC will hold its Call Center Week (CCW) Fall event on **October 16-19** at Horseshoe Bay Resort in **Horseshoe Bay, Texas**. Visit www.callcenterweekfall.com.

The Insights Association will hold the 2017 Corporate Researchers Conference (CRC) on **October 16-18** in **Chicago**. Visit www.insightsassociation.org/conference/2017-corporate-researchers-conference-crc.

LIMRA will hold its 2017 Annual Conference on **October 22-24** at the Gaylord National Resort and Convention Center in **National Harbor, Md.** Visit www.limra.com/annual.

KNect365 (IIR) will hold The Market Research Event (TMRE) on **October 22-25** at the Rosen Shingle Creek in **Orlando, Fla.** Visit marketing.knect365.com/tmre.

The 2017 Pharma Market Research Conference (Europe) will be held on **October 24-25** in **Dusseldorf, Germany**. Visit europe.pharmamarketresearchconference.com.

Research & Results will hold its annual trade show on **October 25-26** at the MOC Convention Centre in **Munich**. Visit www.research-results.com/trade-show/overview/index.html.

ESOMAR will hold its Global Qualitative 2017 event on **November 5-7** at the Crowne Plaza Porto in **Porto, Portugal**. Visit www.esomar.org.

The Merlien Institute will hold its MRMW Europe 2017 event on **November 8-9** in **Berlin**. Visit eu.mrmw.net.

KNect365 (IIR) will hold its 2017 OmniShopper International event on **November 13-15** at Tryp Barcelona Apolo Hotel in **Barcelona, Spain**. Visit marketing.knect365.com/omnishopper-intl.

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.

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10 minutes with...

Denise Offutt

Manager, Market Research, Epson



“Now the consumer approach has shifted to Internet panels and social media, while B2B still includes telephone. Nevertheless, it always comes down to the same concern: Are we speaking to the right audience?”

What excites you about coming to work each day?

Whether the job is studying crosstabs or observing interviews, I love watching and listening to people – to understand how they think, what they feel, why they act the way they do. I want to know why!

Describe your first job in MR and how it is different from your current position.

My first research position was in packaged goods. Among my chief responsibilities were tracking, analyzing and distributing Nielsen data – the audit. This was when people actually went into stores and counted bottles and boxes on the shelf. Purex’s share of bleach and laundry detergent was a key focus!

Today the point-of-sale data is just as critical but everything comes from check stand scanner records. Now I’m responsible for Epson’s relationship with NPD and GfK in the U.S., Canada and Latin America. So the process has changed thanks to UPC and scanners but the information is still critical to managing the brand.

On the proprietary side, mail and telephone were the most popular methodologies. Now the consumer approach has shifted to Internet panels and social media, while B2B still includes telephone. Nevertheless, it always comes down to the same concern: Are we speaking to the right audience? Are we speaking to them in a way they can understand?

Talk about your greatest achievement within marketing research to date.

Product development – the biggest thrill I ever had was standing in the Heathrow airport in London at Dixons – the largest consumer electronics retailer in the U.K. – looking at Epson PictureMate knowing that the product began in a focus group facility in Chicago in the middle of winter two years earlier! I don’t believe I ever thought something I worked on would be sold around the world.

From a methodology perspective, leading the team that established Epson’s first online ink tracking panel was a very important achievement that opened up new perspectives. I got to work with many people across Seiko Epson.

Do you feel any of your go-to research techniques are overlooked by the industry?

Out-of-box experience – watching someone set up a new piece of hardware is fascinating! Listening to them talk to themselves and problem solve offers so much insight into next-steps needed to make our products even more user-friendly. It’s time-consuming work but always offers new insights and benefits.

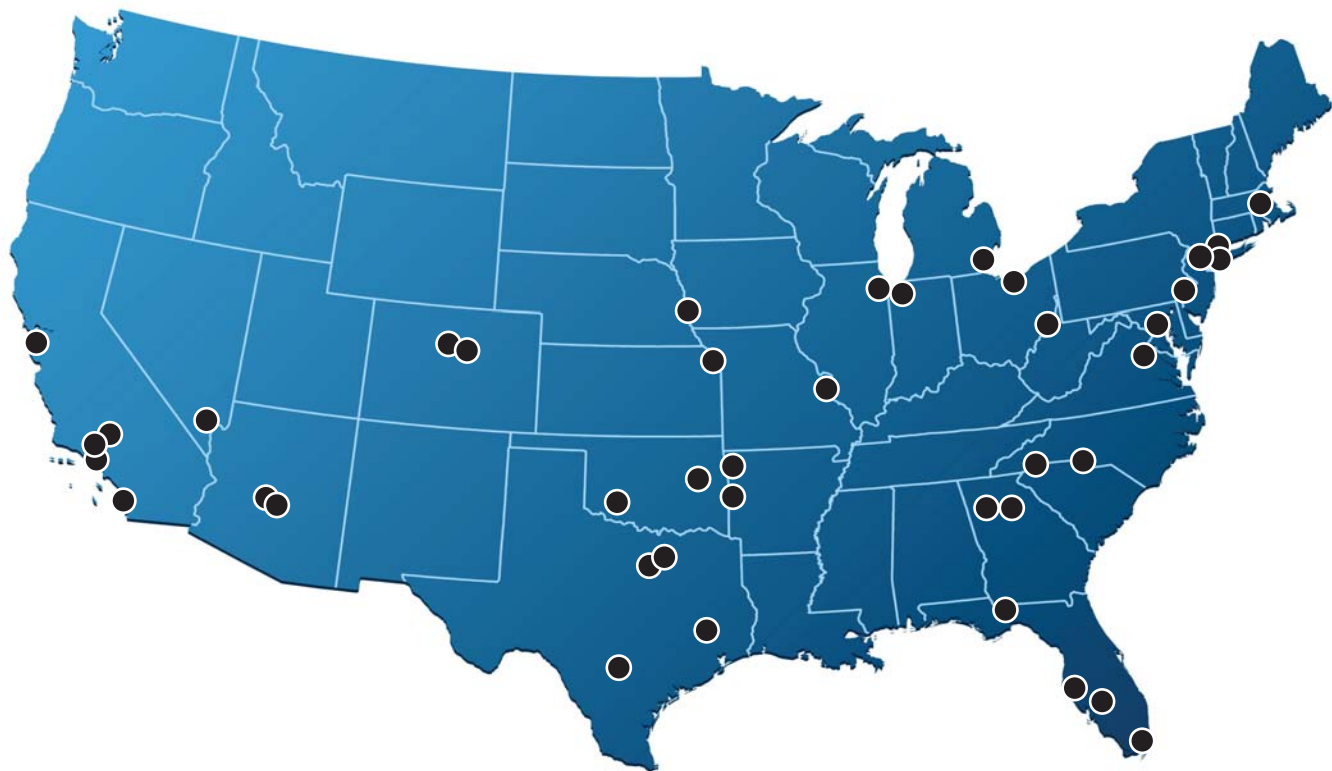
What advice would you give a researcher starting out in a tech company like Epson?

I would advise someone to start at a research vendor or packaged goods to get exposure to more audiences, products, methodologies and objectives. Technology can be highly focused – it would be harder to work a range of projects without that prior experience.

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